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OPEN SYSTEMS® Accounting Software

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**ODBC Kit**  
**User's Manual**

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Document Number 2210.OD65

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Printed in U.S.A. This manual is recyclable.

April 2003, Release 6.5

This document has been prepared to conform to the current release version of OPEN SYSTEMS Accounting Software. Because of our extensive development efforts and our desire to further improve and enhance the software, inconsistencies may exist between the software and the documentation in some instances. Call your customer support representative if you encounter an inconsistency.

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# Introduction

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# Welcome to OSAS®

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The OPEN SYSTEMS Accounting Software (OSAS) product line consists of several accounting applications. Each application addresses a different phase of your financial operations; together, they form a powerful accounting solution to your daily and periodic accounting needs.

## Customer Support

Open Systems, Inc. has a strong commitment to customer service and product quality. If you have difficulty using Open Systems, Inc. products, consult your user's manual and other OSAS reference materials. If you need more information, consult a customer support representative.

## OSAS Overview

### Resource Manager

The Resource Manager application is the foundation or shell of OSAS. It provides the operating environment that holds the other applications. Resource Manager also includes three powerful business features: Global Inquiry, Executive Information Summary (EIS), and Print Manager. With Global Inquiry, you can drill through your accounting data to find selected information throughout your system. With EIS, you can access company information quickly and view summaries of all aspects of a company or a group of companies. With Print Manager, when you print reports to file, your reports can be stored, sorted, printed, and searched for specific text.

### Base Applications

Base applications are designed and produced with the largest possible number of industries in mind. They are most effective when you interface them with each other. Base applications are usually named after common accounting operations. Examples are: General Ledger, Accounts Payable, Purchase Order, Accounts Receivable, Sales Order, Payroll, and Inventory.

## Running OSAS

OSAS runs on an operating system supported by 150 megabytes of permanent storage and 4MB of RAM. You may need additional space or memory, depending on the size of your data files and the operating system you use. Consult your reseller for more information.

### Starting OSAS in Windows

To start OSAS on a computer running Windows, double-click the OSAS shortcut on the desktop or access the program from the **Start** menu.

### Starting OSAS on Other Operating Systems

To start OSAS on an operating system other than Windows, enter **osas** at the operating system prompt.

The **osas** command can recognize three parameters: **-t**, **-c**, and **-a**.

The terminal ID (**-t**) is the identification code assigned to the terminal you are using to run OSAS. On multiuser systems, each terminal usually has a default ID assigned when the terminals were added to the system. Use the **-t** parameter only when you want to log on with an ID other than the default ID. The terminal parameter is valid only if you are using Resource Manager for LANs.

The company ID (**-c**) is the identification code assigned to a company. If your system carries two or more companies and you do not enter a company ID, the menu of the company entered by the last person who used the terminal appears.

The access code (**-a**) is your personal password. Use the **Access Codes** function on the Resource Manager **Company Setup** menu to set up access codes.

The most general expression for getting into OSAS takes all the parameters into account. For example, if you are on terminal 2 (**T2**) working with company **B**, and the password is **apple**, specify that information to access the system:

```
osas -t T2 -c B -a apple
```

---

In UNIX you can enter the parameters in any order, and you can use any combination. You must leave a space between the parameter mark (**-t**, **-c**, or **-a**) and the parameter itself.

**Note**

In Windows, you can set up OSAS such that it always opens using a certain access code. Open the OSAS program shortcut's properties and enter the access code and your company ID in the **Target** box. For example, using **apple** as your access code and **H** as your company ID, enter the following:

```
C:\osas\progRM\osastm.exe -m4096 -tT00 -nT00 - -aapple -cH
```

If you want the system to prompt for an access code after opening, enter **-a** in the **Target** field, followed by a space, followed by **-c** and the company ID.

In the Windows icon properties, the parameter marks (**-m**, **-t**, or **-n**) can be entered in any combination but must be before the separation dash. The access code and company ID commands (**-a** and **-c**) must be entered *after* the separation dash. See the Resource Manager Installation Manual for more information on these parameters.

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# The ODBC Kit

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Use the ODBC Kit to access your OSAS company information from any ODBC-compliant application such as Microsoft Access, Excel, Query™, or Word™; Crystal Reports, and so forth. The functions available from the OSAS menu are used to manage the data dictionaries and the ODBC driver.

## Menu Structure

The ODBC Kit menu structure is similar to the structure of other OSAS applications: functions appear roughly in order of use.

### Edit CONFIG.TPM

Use the **Edit CONFIG.TPM** function to set up a database configuration file for each company installed in OSAS whose data you want to access using the ODBC drivers.

### Dictionary Tools

Use the functions on the **Dictionary Tools** menu to set up and maintain information about your data dictionary. For example, use the **Update Reserved Words** function to establish and update information about reserved words for the version of SQL you use.

### Dictionary Reports

Use the Dictionary Reports functions to verify that field names are not SQL reserved words, to produce a list of field and file names in the data dictionary.

## Application Interaction

The ODBC Kit is an application that translates your OSAS data into fields accessible through SQL (Structured Query Language). You can use SQL to access any application included in the data dictionary to which you have access rights.



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# Conventions

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This manual helps you install OSAS on any standard computer running any of several popular operating systems and helps with your accounting software questions. Use the manual as a reference for the OSAS interface and application functions.

## Manual Conventions

This manual is divided into the following sections:

- This introduction provides an overview of this application and the OSAS system, the basic functionality of the application including graphical and text-based application features, and function key references.
- The remainder of the chapters explains the set up, workflow, and functions of the application: where each function fits within the application and how to use each function to get the most out of the application.

## Mouse Conventions

The standard mouse has two buttons, left and right, each performing certain functions. In this manual, these terms are used for operating the mouse: *click*, *right-click*, *double-click*, and *deselect*.

The *click* is a single press on the left mouse button. Place the cursor over the desired function, and press the left button to enable, or *select*, that function.

A *right-click* is a single press of the right mouse button.

To *double-click*, move the cursor over the desired function and quickly press the left mouse button twice. If there is too long a pause between clicks, the computer may interpret your action as two separate clicks and may not perform the desired function.

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To *deselect* an object, move the cursor off the icon or folder onto a blank space within the window and press the left mouse button.

**Note**

Some mouse manufacturers allow you to change the function of the mouse buttons for those who prefer (for example) to use the mouse with their left hand. In this case, reverse the commands when you use them. For example, a *click* refers to a single press of the right mouse button, while the term *right-click* refers to a single press of the left button.

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## GUI/Text Command Conventions

When you see the phrase “use the **Proceed (OK)** command” in the user’s manuals, press **PgDn** in either text or graphical mode. In graphical mode, clicking **OK** has the same effect as pressing **PgDn**.

## GUI/Text Menu and Function Conventions

When you start OSAS, the main menu appears and lists the applications available for use. If you are using UNIX or Linux, the text main menu appears.

If you are using Windows, you can choose between the text main menu, the graphical main menu, or the start-style main menu. Use the **Defaults** function under the Resource Manager **Workstation Configuration** menu to select the style of menu you want to appear by default, or you can press **Shift+F5** to toggle between the menu styles from any menu. You can use any of the menus regardless of whether you use the text or graphical modes for the OSAS functions.

In addition, if you are using Windows, you can use either text or graphical function screens independently of the main menu. For example, you can use text function screens even if you are using the graphical main menu and vice versa. Select **GUI Functions** from the **Modes** menu or press **Shift+F6** to toggle between the text and graphical modes for function screens.

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## Access Codes

Your company can limit use of the system by defining access codes and assigning them to employees. Each code allows access to specific applications, menus, and functions. If you cannot select a menu, your access code is not authorized for it.

Use the **Access Codes** function on the Resource Manager **Company Setup** menu to set up access codes.

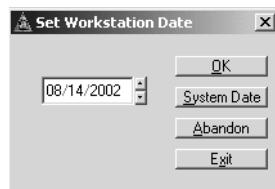
If you have more than one access code, select **Access code** from the **File** menu or press **F4**. The Access Code box appears (the example below uses the graphical mode).



Enter the access code you want to change to, then click **OK** or press **Enter**.

## Workstation Dates

To change the workstation date, select **Workstation date** from the **File** menu or press **F6**. The Workstation Date box appears (the example below uses the graphical mode).



Use the buttons or your keyboard to enter the date and click **OK** or press **Enter** to change the workstation date. Click **System Date** to change the workstation date to match the operating system date, click **Abandon** to restore the original date, or click **Exit** or press **F7** to close the box without changing the date.

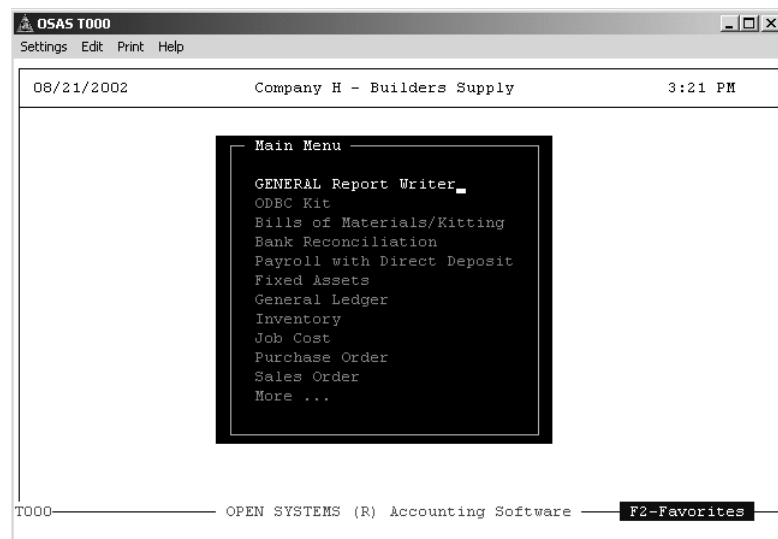


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## OSAS Text Menu

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The text main menu can be used on all operating systems. Using text-based menus, the text menu (shown below) offers easy access to your applications.



When you select an application, the application's menu, which presents several related functions, is superimposed over the main menu. Selecting a function leads you to a function screen or to another menu.

You can select applications from the main menu in these ways:

- Use the arrow keys to move the cursor up or down, highlighting the application you want to use. Then press **PgDn** or **Enter** to select it.
- Press the first letter of the application you want to use. The cursor jumps to the first application beginning with the letter. Continue to press the letter key or the down arrow until the application you want is highlighted. When your choice is highlighted, press **PgDn** or **Enter** to select it.

- 
- Position the mouse cursor over the application and click. The application briefly highlights and switches to the application screen.
  - To jump to the first application on the menu, press **Home**. To jump to the last application on the menu, press **End**.

To select a function from an application menu, highlight and select your choices the same way you do on the main menu—with one exception: you can press **PgDn** only when an option leads to another menu. You must press **Enter** to select a function.

On an application menu, you can press **PgUp** to move to the menu immediately above it. If you are several menu levels away from the main menu, you can return to the main menu by pressing **PgUp** repeatedly or by pressing the **Tab** key.

You can exit from a menu in these ways:

- Press **PgUp** to go to the previous menu (one menu up).
- Press the **Tab** key to go to the main menu.
- Use **Exit (F7)** to go to the operating system.

## Commands

Several commands are available within the menu to perform various tasks such as changing the system date, entering access codes, switching between sample data and live data, and so on. To access a command, press the corresponding key. If you're working with a keyboard that lacks function keys (labeled with an **F** followed by a number) or if you're working with an emulator in UNIX (which can cause function keys to become unavailable), press the appropriate alternate key combination to access the command.

Command Key	Alternate Key	Description
<b>Esc</b>		Opens a menu listing available commands.

---

<b>Command Key</b>	<b>Alternate Key</b>	<b>Description</b>
<b>F1</b> (Help)	<b>Esc+H</b>	Opens the help description for the selected application/function. You must be within an application menu to access this command.
<b>F2</b> (Favorites)	<b>Esc+W</b>	Toggles between the <b>Favorites</b> and main menus.
<b>F3</b> (Change Company)	<b>Esc+D</b>	Allows you to switch to a different company.
<b>F4</b> (Access Code/Other)	<b>Esc+O</b>	Allows you to enter an access code. Pressing this key (or key combination) twice opens a utility menu similar to the <b>Other Commands</b> menu on graphical screens. See “Other Commands Menu” on page 1-22 for more information on the commands available.
<b>F5</b> (Live/ Sample Data)	<b>Esc+X</b>	Switches between live and sample data.
<b>F6</b> (Workstation Date)	<b>Esc+F</b>	Allows you to change the workstation date.
<b>F7</b> (Exit)	<b>Esc+M</b>	Exits from OSAS.
<b>F8</b> (Print Screen)	<b>Esc+L</b>	Allows you to output the current screen to a printer, print preview window, or file.
<b>F9</b> (Change Year)	<b>Esc+U</b>	Allows you to change to a different fiscal year when you are inside the <b>General Ledger</b> or <b>Payroll</b> menus.

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<b>Command Key</b>	<b>Alternate Key</b>	<b>Description</b>
<b>F10</b> (Add to/ Delete Favorites)	<b>Ctrl+Z</b>	Pressing this key (or key combination) on the main menu adds the selected application or function to your <b>Favorites</b> menu. Pressing this key on the <b>Favorites</b> menu removes the selected application or function from the <b>Favorites</b> menu.
<b>Shift+F2</b> (Application Info)	<b>Esc+I</b>	Opens a screen listing information about the applications you have installed.
<b>Shift+F5</b> (Menu Style)	<b>Esc+G</b>	On Windows workstations, pressing this key combination toggles between graphical and text main menus.
<b>Shift+F6</b> (Toggle GUI screens)	<b>Esc+K</b>	On Windows workstations, pressing this key combination toggles between graphical and text function screens.
<b>PgUp</b>		Moves back one menu level.
<b>Tab</b>		Moves back to the main menu from any application menus.
<b>Enter</b>		Selects an application menu or function from a menu.
<b>Up/Down arrow</b>		Moves the cursor up or down through the menu selections.

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## OSAS Graphical Menu

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In a Windows environment, you can choose from two types of graphical-style menus. The standard graphical menu features application selections that resemble many Windows functions. The start-style menu is named so because of its functional resemblance to the **Start** menu in Windows 95, 98, NT, and 2000.

Both graphical menus provide pull-down menus, convenient tool buttons, and easy access to your installed applications and their functions using either the mouse or keyboard. The two graphical menus provide you with a visual choice in your interaction with OSAS and your data.

When you select an application in either graphical OSAS menu, the application's main menu, presenting several related functions, appears beside the OSAS menu. Selecting a function leads you to either a function screen or another menu.

Several commands are available within the menu to perform various tasks such as changing the system date, entering access codes, switching between sample data and live data, and so on. You can access commands in these ways (if a button or pull-down menu selection is muted or gray, it is not available for use):

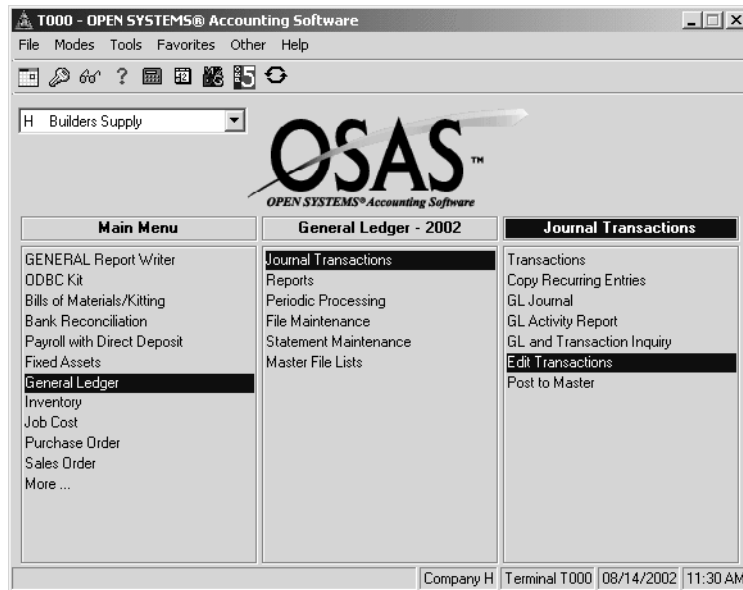
- Click the appropriate graphical tool button.
- Select the command from a pull-down menu.
- Press the associated keyboard hot key.

If you use the graphical menu, you can select application menus and functions by clicking the function or menu name on the menu or by highlighting your choice and pressing **Enter**. If you choose the start-style menu, you can select applications from the main menu by using the arrow keys to highlight your choice and pressing **Enter**, by clicking the selection, or by holding the mouse cursor over the selection until the menu appears.

From any application menu, you can select a button from the previous menu to move directly to that menu. If you are several menu levels away from the main menu, you can return to the main menu by clicking items on the previous menus.

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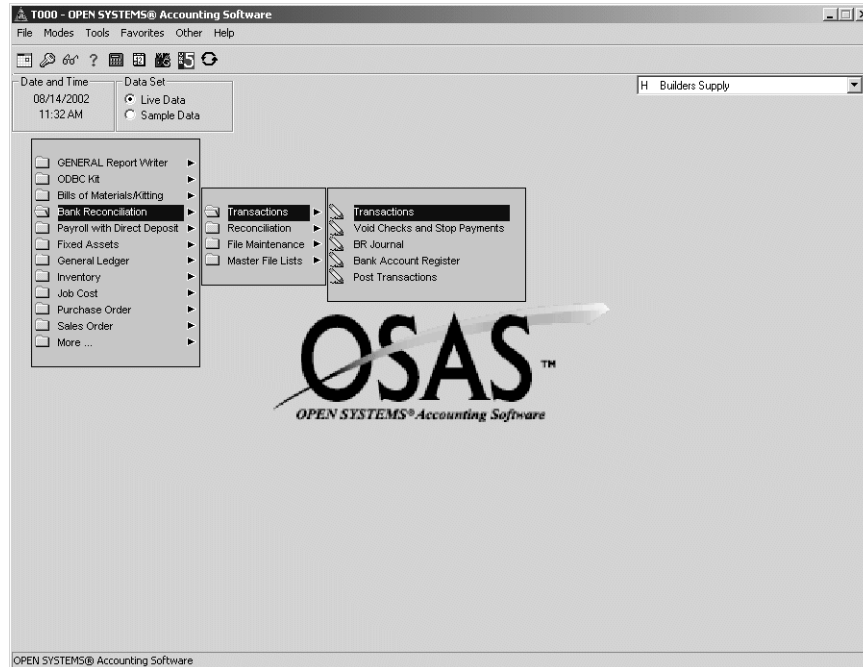
## Graphical Main Menu



You can exit from a graphical menu in these ways:

- Select a button from a previous menu.
- Press the **Tab** key to go to the OSAS menu.
- Click the Close box in the upper-right corner of the window.
- Use **Exit (F7)**.
- Select **Exit** from the **File** menu.

## Start-Style Main Menu



You can exit from a menu in these ways:

- Press the left arrow key to go to the previous menu (one menu up).
- Hold the mouse over a different menu choice.
- Press the **Tab** key to go to the OSAS menu.
- Click the Close box in the upper-right corner of the window to close OSAS.
- Use **Exit (F7)** to close OSAS.
- Select **Exit** from the **File** menu to close OSAS.

## Main Menu Elements

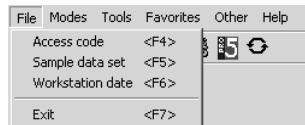
### Pull-Down Menus

When using the graphical menus, you can use the pull-down menus and toolbar buttons to access functions without using the function keys. While the function keys work in graphical menus, the menu bar and toolbar buttons give you a choice in accessing these functions. The OSAS pull-down menu bar is shown below.



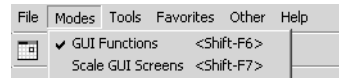
To access the menu's commands, click one of the menu titles. The menu for that heading appears and lists available commands followed by any hot key combinations in brackets <>. To use a command, either click the command name or press the hot key(s) listed.

### File Menu



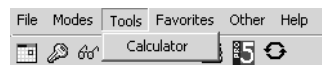
Command	Description
<b>Access Code</b>	Opens the Access Code dialog box. See "Access Codes" on page 1-11 for more information.
<b>Sample data set/Live data set</b>	Toggles between Sample and Live data.
<b>Workstation date</b>	Opens the Workstation Date dialog box. See "Workstation Dates" on page 1-11 for more information.
<b>Exit</b>	Exits OSAS.

### Modes Menu



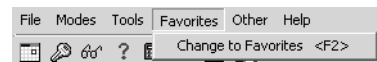
Command	Description
<b>GUI Functions</b>	Toggles between graphical and text function screens.
<b>Scale GUI Screens</b>	Toggles scaling of graphical screens on and off. When selected, this command enlarges graphical screens. When off, the command restores the OSAS screens to their original size. This command does not take effect until you access a function.

### Tools Menu



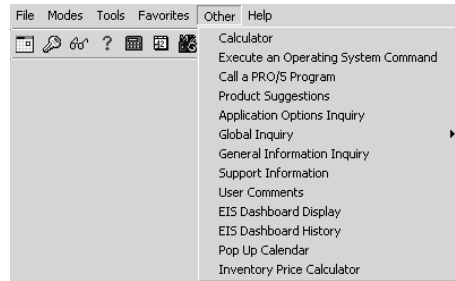
Command	Description
<b>Calculator</b>	Opens the OSAS calculator.

### Favorites Menu



Command	Description
<b>Change to Favorites</b>	Toggles between the <b>Favorites</b> and main menus. See “Favorites Menu” on page 1-49 for more information.

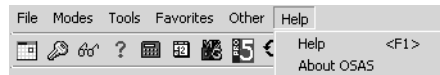
## Other Commands Menu



Command	Description
<b>Calculator</b>	Opens the OSAS calculator.
<b>Execute an Operating System Command</b>	Allows you to enter an operating system command from within OSAS.
<b>Call a PRO/5 Program</b>	Allows you to execute a PRO/5 program.
<b>Product Suggestions</b>	Creates a report for future OSAS product suggestions.
<b>Application Options Inquiry</b>	Allows you to view the application options you have set up for a particular application.
<b>Global Inquiry</b>	Allows you to search across your data. You can select from the installed applications which data to search.
<b>General Information Inquiry</b>	Allows you to search for information on employees, customers, and vendors.
<b>Support Information</b>	Displays the OSAS Support Information.
<b>User Comments</b>	Allows you to record comments for your own use.
<b>EIS Dashboard Display</b>	Displays the EIS Dashboard.
<b>EIS Dashboard History</b>	Displays the EIS Dashboard history.

Command	Description
<b>Pop-Up Calendar</b>	Allows you to create and read date reminders in OSAS.
<b>Inventory Price Calculator</b>	Allows you to calculate prices and view quantity, cost, and pricing information for inventory items.

### Help Menu












Command	Description
<b>Help</b>	Opens help descriptions for the application menus and functions.
<b>About OSAS</b>	Opens the About OSAS dialog box.

### Main Menu Toolbar

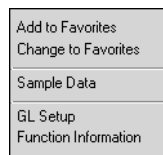
The main menu toolbar gives you quick access to frequently-used OSAS commands. To access a command, click the appropriate button.



Button	Description
	Opens the Workstation Date dialog box to change the date. See “Workstation Dates” on page 1-11 for more information.
	Opens the Access Code dialog box to switch between access codes. See “Access Codes” on page 1-11 for information.
	Displays the <b>Application Information</b> dialog box.

Button	Description
	Opens help descriptions for the application menus and functions.
	Opens the OSAS calculator.
	Displays the pop-up calendar screen. You can use the calendar to add and review reminders for any date.
	Opens an MS-DOS command window.
	Displays a screen for calling any BBx program that does not require variables to be passed to it. For more information, see “Appendix F” in the <i>Resource Manager User’s Manual</i> .
	Toggles between the <b>Favorites</b> and main menus. See “Favorites Menu” on page 1-49 for more information.

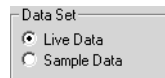
## Right-Click Menu



On the graphical and start-style main menus, the right-click menu gives you quick access to commands that help you manage commands on your **Favorites** menu, switch between sample and live data, perform certain setup tasks, and view function information. To access the menu, click the right mouse button anywhere on the graphical or start-style main menu.

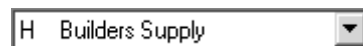
Command	Description
<b>Add to/Remove Favorites (F10)</b>	Use the <b>Add to/Remove Favorites Menu</b> button to add the desired submenu or function to or from your <b>Favorites</b> menu.
<b>Change to Favorites/Main (F2)</b>	Toggles your display menu between the <b>Favorites</b> and main menus.
<b>Sample Data/Live Data (F5)</b>	Switches between sample and live data.
<b>Setup (F9)</b>	Performs certain application setup tasks. For example, in General Ledger, you can select the year with which you want to work. If Setup is required in an application, the application's user's manual describes its use.
<b>Function Information (F1)</b>	Displays information about the selected function.

## Data Set



On the start-style main menu, you can select the **Live Data** radio button to work with live data or select the **Sample Data** radio button to work with sample data. You can also press **F5** to toggle between sample and live data.

## Change Company Field



On the start-style or graphical main menu, select the company to change to from the list box.



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## OSAS Text Functions

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Like the text menu, OSAS text function screens can be used on all operating systems. On Windows workstations, text function screens can also be used with graphical menus (or vice versa—the text menu can be used with graphical function screens).

Function screens provide you an interface to the data in your data files, allowing you to view, update, and change information as needed. Function screens also allow you to print reports or perform tasks on your data, such as calculations, purges, or the resetting of accumulated totals.

The screenshot shows a window titled "OSAS T000" with a menu bar containing "Settings", "Edit", "Print", and "Help". The main area is titled "Invoices" and "Header Information". The data is as follows:

Batch ID	000001	Transaction Type	Invoice
Trans No	0023	Location	MINNEAPOLIS WAREHOUSE
Location	MN0001	Sold to:	CASHCA CASH SALES-OAKLAND, CA
Sales Rep 1	GPD	Percent	100.0
Sales Rep 2		Percent	.0
Cust Level	RETAIL	Ship to:	
Terms Desc	C.O.D.	Ship Method	
Terms%	.0 Days	Ship Via	
Order No		Pick Slip No.	
Ord Date		Ship Date	08/23/2002
Inv No		GL Period	08
		Taxable	YES
		Tax Group	CA
		Description	California

At the bottom of the screen, there is a command bar with buttons for "Company H", "Info", "Maint", "Inquiry", and "Verify".

You can move around the screen in these ways:

- Press the down arrow or **Enter** to move from field to field.
- Select the appropriate command on the command bar.

- 
- Use commands to access information screens or to toggle commands on and off. See “Commands and Flags” on page 1-28 for more information.
  - If a screen contains more than one section, press **PgDn** when prompted to move to the next section.
  - If a menu appears prompting you for the kind of information to enter or maintain (such as on Transaction or File Maintenance screens), select the appropriate option and press **Enter**.
  - Press **F7** to exit the screen and return to the main menu.

## Text Function Screen Elements

### Command Line

The command line appears at the bottom of the screen and gives you access to commands that allow you to move around the screen, add or edit information, change settings for selected lines, or select output devices. Press the highlighted key to use a command.

<code>Enter = edit, Append, View, Workstation ID, Header</code>
---

The commands that are available depend upon the function you are using. Consult the user’s manual for the appropriate application for information on commands in the command line.

### Commands and Flags

Like the text menu, text function screens also contain several commands that allow you to perform tasks related to the function you are using. Some of these commands are not available for every function; when a command is available, a flag appears at the bottom of the screen.

To access a command, press the corresponding key. If you're working with a keyboard that lacks function keys (labeled with an **F** followed by a number) or if you're working with an emulator in UNIX (which can cause function keys to become unavailable), press the appropriate alternate key combination to access the command.

<b>Command Key</b>	<b>Alternate Key</b>	<b>Description</b>
<b>Enter</b>		Moves the cursor to the next field and accepts the data entered or access a line for editing.
<b>Esc</b>		Opens a window listing available commands for the screen.
<b>Ins</b>		Toggles between insert and overwrite modes for entry. When the <b>Ins</b> flag appears, the characters you enter push other characters in the field to the right. If there is no <b>Ins</b> flag, the characters you enter overwrite other characters in the field.
<b>PgUp</b>		Moves back to the first field on the screen (or the first field after the key field) without erasing any entries.
<b>PgDn</b>		Approves the data on the screen, updates the data file accordingly, and proceeds to the next field or section.
<b>Tab</b>		Moves the cursor to the next block or field that requires an entry.
<b>Up/Down arrow</b>		Moves the cursor up or down through the fields.
<b>F1 (Help)</b>	<b>Esc+H</b>	Opens the help description for the current field.

---

<b>Command Key</b>	<b>Alternate Key</b>	<b>Description</b>
<b>F2</b> (Inquiry)	<b>Esc+W</b>	Opens the Inquiry screen for the current field. This command is available for a field when the <b>Inquiry</b> flag appears at the bottom of the screen. See “Inquiry Commands” on page 1-44 for more information.
<b>F3</b> (Delete)	<b>Esc+D</b>	Deletes the current record or line item (when allowed).
<b>F4</b> (Others)	<b>Esc+O</b>	Opens a utility menu similar to the <b>Other Commands</b> menu on graphical screens. See “Other Commands Menu” on page 1-22 for more information on the commands available.
<b>F5</b> (Abandon)	<b>Esc+X</b>	Abandon processing or clear all fields.
<b>F6</b> (Maint)	<b>Esc+F</b>	Opens the appropriate File Maintenance function where you can view or update master file information. This command is available when the <b>Maint</b> flag appears at the bottom of the screen.
<b>F7</b> (Exit)	<b>Esc+M</b>	Exits from the function.
<b>F8</b> (Print Screen)	<b>Esc+L</b>	Allows you to output the current screen to a printer, to a print preview window, or to a file.
<b>F9</b> (Undo Typing)	<b>Esc+U</b>	Clears the contents of the current field.
<b>F10</b> (Delete)	<b>Ctrl+Z</b>	Deletes information to the end of the line.
<b>Shift+F2</b> (Info Menu)	<b>Esc+I</b>	Opens an information menu for the function when the <b>Info</b> flag appears at the bottom of the screen. The commands that are available depend on the applications you have installed. See “Information Menu” on page 1-37 for more information.

---

<b>Command Key</b>	<b>Alternate Key</b>	<b>Description</b>
<b>Shift+F3</b>	<b>Esc+B</b>	<p>Uses the item alias lookup when the <b>IN Search</b> flag appears for an <b>Item ID</b> field. See “Inventory Lookup” on page 1-46 for more information.</p> <p>In Sales Order, pressing this key combination allows you to enter purchase requisitions from the <b>Ordered, Units, Shipped, and Backordered</b> fields.</p> <p>In sales tax fields, pressing this key combination allows you to view sales tax breakdowns.</p>
<b>Shift+F4</b> (Part # Lookup)	<b>Esc+C</b>	<p>Uses the customer/vendor part number lookup when the <b>IN Search</b> flag appears for an <b>Item ID</b> field. See “Inventory Lookup” on page 1-46 for more information.</p>
<b>Shift+F5</b> (Item Detail Lookup)	<b>Esc+G</b>	<p>Uses the item detail lookup when the <b>IN Search</b> flag appears for an <b>Item ID</b> field. See “Inventory Lookup” on page 1-46 for more information.</p>
<b>Shift+F6</b> (Lot Lookup)	<b>Esc+K</b>	<p>Uses the lot lookup when the <b>IN Search</b> flag appears for an <b>Item ID</b> field. See “Inventory Lookup” on page 1-46 for more information.</p>
<b>Shift+F7</b> (Serial Number Lookup)	<b>Esc+N</b>	<p>Uses the serial number lookup when the <b>IN Search</b> flag appears for an <b>Item ID</b> field. See “Inventory Lookup” on page 1-46 for more information.</p>
<b>Shift+F8</b> (Item Descr. Lookup)	<b>Esc+Q</b>	<p>Uses the item description lookup when the <b>IN Search</b> flag appears for an <b>Item ID</b> field. See “Inventory Lookup” on page 1-46 for more information.</p>

Command Key	Alternate Key	Description
<b>Ctrl+F</b> (Quick Entry)		Toggles quick entry on and off. If this option is off, the cursor stops at every field possible. If you want to skip the fields that are not required (thus speeding data entry), turn this option on. Quick entry is on when the <b>Quick</b> flag appears at the bottom of the screen.
<b>Ctrl+G</b> (Bell)		Toggles the bell on or off. If the bell is on, it sounds at an error or when you must verify a command.
<b>Ctrl+O</b> (Online Hints)		Toggles function key display on and off. If this option is on, the available function keys appear at the bottom of the screen to remind you of their use.
<b>Ctrl+V</b> (Verify)		Toggles verification on and off. If verification is turned on, you must press a key twice to verify that you want to perform an operation. Verification is on when the <b>Verify</b> flag appears at the bottom of the screen.

## Messages

Messages appear at the bottom of the screen when a command is unavailable or when OSAS needs information to continue.

```
Verification _____
                          Press <PgDn> to proceed
```

---

## OSAS Graphical Functions

---

On Windows workstations, you can choose to use the graphical mode for function screens. These screens contain all the functionality of text screens presented in a graphical mode similar to other Windows software programs.

Class	Description	Sales Tax	Purch Tax	Tax Collected	Tax Paid
00	Consumer Goods	0.500	0.500	.00	.00
01	Resale Sales	0.000	0.000	.00	.00
02	Exempt Sales	0.000	0.000	.00	.00
03	Ind/Agr Prod.	0.000	0.000	.00	.00
04	Interstate Comm	0.000	0.000	.00	.00
05	Motor Vehicles	0.000	0.000	.00	.00
06	Food Products	0.000	0.000	.00	.00
07	Clothing	0.000	0.000	.00	.00
08	Gasoline	0.000	0.000	.00	.00
09	Services	0.000	0.000	.00	.00
Total				.00	.00
Calculated				.00	.00
Over/Short				.00	.00

You can move around the screen in these ways:

- Use the mouse or press **Tab** to move from field to field. Use the scroll buttons to move from line to line in scrolling regions.
- If a screen appears prompting for the kind of information to enter or maintain (such as on File Maintenance or Transactions screens), select the appropriate option and click **OK** to continue.
- Press **PgDn** if prompted to move to the next section.
- Click **Header** when it appears to return to the screen's header section.
- Press **F7** to exit the screen and return to the main menu.

## Graphical Function Screen Elements

Like the main menu, graphical function screens also contain pull-down menus and toolbars. These menus and toolbars are described below.

### Function Pull-Down Menus

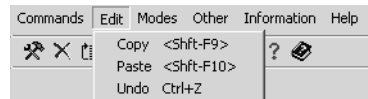
#### Commands Menu

Commands	Edit	Modes	Other	Information	Help
Inquiry	<F2>				
Maintenance	<F6>				
Proceed	<PgDn>				
Start Over	<PgUp>				
Field Up	<Up>				
Field Down	<Down>				
Abandon	<F5>				
Delete	<F3>				
Jump	<Ctrl-J>				
Exit	<F7>				

Command	Description
<b>Inquiry</b>	Lists valid entries for the current field.
<b>Maintenance</b>	Opens the appropriate File Maintenance function.
<b>Proceed/OK</b>	Proceeds to the next screen or saves your entries.
<b>Start Over</b>	Moves back to the first field on the screen or to the first field after the key field without erasing any entries or changes.
<b>Field Up</b>	Moves the cursor to the previous field.
<b>Field Down</b>	Moves the cursor to the next field.
<b>Abandon</b>	Clears data from all fields and moves the cursor to the first field on the screen.
<b>Delete</b>	Deletes information on the screen. Since this command deleted an entire record, use it with caution.

Command	Description
<b>Jump</b>	Moves the cursor to the next block of data on the screen or to the next field that requires an entry.
<b>Exit</b>	Exits from a screen or a window without saving data.

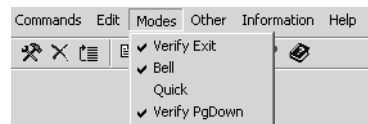
### Edit Menu



Command	Description
<b>Copy</b>	Copies the contents of the current field.
<b>Paste</b>	Pastes the value you copied from a previous field into the current field.
<b>Undo</b>	Restores the contents of the current field from before you made changes to it.

### Modes Menu

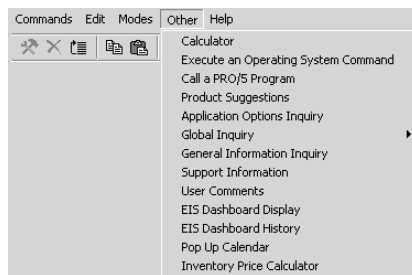
Select the options you want to use.



Command	Description
<b>Verify Exit</b>	When verification is on, you must press a key twice to verify that you want to exit or abandon functions.

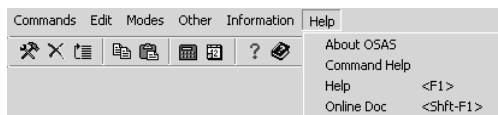
Command	Description
<b>Bell</b>	When the bell is turned on, it sounds at an error or when you must verify a command.
<b>Quick</b>	When this option is off, the cursor stops at every field possible. To make the cursor skip the fields that do not require an entry in certain application functions, select the option.
<b>Verify PgDown</b>	If verification is turned on, you must press <b>PgDn</b> twice to proceed to the next screen or to save your entries.

### Other Commands Menu



See “Other Commands Menu” on page 1-22 for information on this menu’s commands.

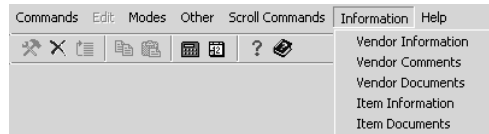
### Help Menu



Command	Description
<b>About OSAS</b>	Opens the About OSAS dialog box.
<b>Command Help</b>	Opens the OSAS Key Help screen.

Command	Description
<b>Help</b>	Lists information about the field on which you are working.
<b>Online Doc</b>	Launches your .PDF file viewer and opens the documentation for the appropriate OSAS application.

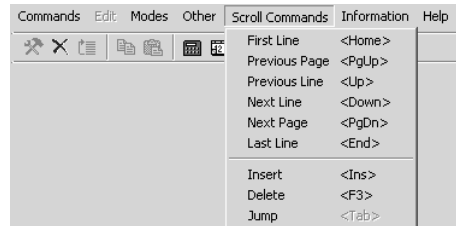
### Information Menu



The **Information** menu appears on some function screens in certain applications. The functions on the menu are determined by the applications installed.

The **Information** menu also gives you access to documents attached to customer, vendor, employee, invoice, or other records. When the **Information** menu appears, select the appropriate **Documents** command to open the Documents screen where you can view document information or open attached documents.

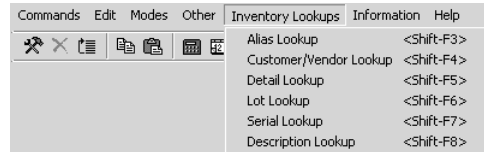
## Scroll Commands Menu



The **Scroll Commands** menu appears only on screens with scroll regions.

Command	Description
<b>First Line</b>	Moves the cursor to the first data entry field.
<b>Previous Page</b>	Displays the previous page.
<b>Previous Line</b>	Moves the cursor up to the previous line.
<b>Next Line</b>	Moves the cursor down to the following line.
<b>Next Page</b>	Displays the following page.
<b>Last Line</b>	Moves the cursor to the last data entry field.
<b>Insert</b>	Inserts characters between pre-existing entries in a field.
<b>Delete</b>	Deletes the selected characters.
<b>Jump</b>	Moves the cursor to the next section of the screen in some functions.

## Inventory Lookups Menu












If you use the Inventory application and the cursor is in an **Item ID** field, you can use any of the **Inventory Lookups** commands to search for information about items and select an item for entry in the field you are in.

Command	Description
<b>Alias Lookup</b>	Searches for items with a specified alias listed as an alternate item. When you enter the alias, you can use the * and ? wildcard characters to restrict or widen the search.
<b>Customer/Vendor Lookup</b>	Searches for an item based on customer ID or vendor ID. When you enter the customer or vendor ID, you can use the * and ? wildcard characters to restrict or widen the search.
<b>Detail Lookup</b>	Searches for detailed information about an item. You can enter search information in any of the fields that appear using any of the following wildcard characters to restrict or widen the search: * ? < > =.
<b>Lot Lookup</b>	Searches for an item based on lot number. When you enter the lot number, you can use the * and ? wildcard characters to restrict or widen the search.
<b>Serial Lookup</b>	Searches for an item based on serial number. When you enter the serial number, you can use the * and ? wildcard characters to restrict or widen the search.
<b>Description Lookup</b>	Searches for an item based on item description. When you enter the description, you can use the * and ? wildcard characters to restrict or widen the search.

## Function Screen Toolbar



Like the main menu's toolbar, the toolbar located near the top of function screens gives you quick access to frequently-used commands. Click the appropriate button to access a command.

Button	Result
	Opens the appropriate File Maintenance function to update information about the field you are in.
	Deletes the information on the screen. Since this command can delete an entire record, use it with caution.
	Moves the cursor back to the first field on the screen or to the first field after the key field without erasing any entries or changes.
	Copies the contents of the current field.
	Pastes the contents you copied from a previous field into the current field.
	Opens the OSAS calculator screen.
	Opens the pop-up calendar. Use the calendar to add and review reminders for any date.
	Displays information about the field you are in.
	Opens your .PDF file viewer so that you can view the online documentation.


## Right-Click Menu



The right-click menu gives you quick access to commonly used commands such as those used to access help, move around the function screen, work with information on EIS dashboards, and so on. The commands that are available on the right-click menu depend on the function and the field you are currently using.

## Function Field Inquiry



When the Inquiry button appears next to a field on a function screen, you can either click the  button or press the **F2** (Inquiry) key to open the inquiry screen and search for information.

## Verification Buttons



When you've completed data entry on a function screen, you can either click **OK** or press **PgDn** to proceed to the next screen or to save your entries. Click **Abandon** or press **F5** to abandon entries.



---

## Menu and Function Commands

---

OSAS lets you navigate around the main menu and function screens in a variety of ways. This section describes the commands that are available when you access a specific command. For example, accessing the **Help** command makes the **Maintenance** and **Exit** commands available while you are in that function. This section also describes how to navigate within scroll regions and fields while you work with OSAS functions.


### Help Commands

When you use the **Help (F1)** command, you can use these commands.

Key	Operation
<b>F3</b> (Delete)	Deletes the help screen content. To recover a deleted screen, copy the <b>xxHELP</b> file from the distribution media to the <b>/PROGxx</b> subdirectory ( <i>xx</i> is the application ID). The copying process overwrites changes you made to other help screens.  In graphical mode, you must first press <b>F6</b> to enter the edit screen for the help content before you can press <b>F3</b> .
<b>F6</b> (Maintenance)	Edits a help screen.
<b>F7</b> (Exit)	Exits the help screen and closes the window.

---

## Inquiry Commands

When the Inquiry button  appears next to a field or the **Inquiry** flag appears in the lower-right corner of the screen, the **Inquiry** command is available. Click the button or press **F2** to open the Inquiry screen to look up and select an appropriate entry.

The Inquiry screen operates in two modes: **Search** and **Sort**. You can toggle between these modes within an **Inquiry** window by pressing the **Ins** (Insert) key. You can also choose the default mode for Inquiry windows by using the **Defaults** function on the **Workstation Configuration** menu within **Resource Manager**.

- In **Search** mode, you can move through the keys listed by typing progressively larger portions of the key you want to find. For example, when you press **C**, the window displays keys beginning with the letter C. When you next press **A**, the window displays keys beginning with CA, and so on.
- In **Sort** mode, you can change the order of certain **Inquiry** windows by pressing the letter key associated with the window sort. You can see the available sorts in any **Inquiry** window by pressing **Esc** (**Command Help**).







---

**Note**

To shorten your data search, use a partial-key inquiry to cut down the size of the inquiry list. For example, if you know that the ID starts with **JAR**, enter **JAR** in the **ID** field *before* you use the **Inquiry** command. The Inquiry list starts with **JAR** and runs through the end of the list.

---

The following commands are available inside Inquiry windows. The scroll buttons are available in graphical mode only.

Key	Button	Description
<b>Home</b>		Moves directly to the first item on file.
<b>PgUp</b>		Displays the previous page of the window.
<b>Up</b>		Moves up one item.
<b>Down</b>		Moves down one item.
<b>PgDn</b>		Displays the next page of the window.
<b>End</b>		Moves directly to the last item on file.
<b>Ins</b> (Look Up)		Toggles between <b>Search</b> mode and <b>Sort</b> mode.
<b>F7</b> (Exit)		Leaves the <b>Inquiry</b> window without selecting anything.
<b>Enter</b>		Selects the item to which the cursor is pointing.
<b>Esc</b> (View Commands)		Opens a window that shows <b>Inquiry</b> window commands and the Window ID. The <b>Esc</b> key is available in text mode only.  In graphical mode, select <b>Command Help</b> from the <b>Help</b> menu to view a list of commands available.

---

## Inventory Lookup







If you use the **Inventory** application and the cursor is in an **Item ID** field on a function screen, you can use any of the **Inventory Lookup** commands to search for information about items and select an item for entry in the field. In graphical mode, these commands are available on the **Inquiry Lookup** menu. In text mode, the **IN Search** flag appears at the bottom of the screen to alert you that these commands are available.

<b>Command</b>	<b>Hot Key</b>	<b>Operation</b>
<b>Alias Lookup</b>	<b>Shift+F3</b>	Searches for items with a specified alias listed as an alternate item. When you enter the alias, you can use the * and ? wildcard characters to restrict or widen the search.
<b>Customer/ Vendor Lookup</b>	<b>Shift+F4</b>	Searches for an item based on customer or vendor ID. When you enter the ID, you can use the * and ? wildcard characters to restrict or widen the search.
<b>Detail Lookup</b>	<b>Shift+F5</b>	Searches for detailed information about an item. Enter information in any of the fields that appear, using these wildcards to restrict or widen the search: * ? < > =.
<b>Lot Lookup</b>	<b>Shift+F6</b>	Searches for an item based on lot number. When you enter the lot number, you can use the * and ? wildcard characters to restrict or widen the search.
<b>Serial Lookup</b>	<b>Shift+F7</b>	Searches for an item based on serial number. When you enter the serial number, you can use the * and ? wildcard characters to restrict or widen the search.
<b>Description Lookup</b>	<b>Shift+F8</b>	Searches for an item based on item description. When you enter the description, you can use the * and ? wildcard characters to restrict or widen the search.

---

## Scroll Region Commands

When the prompt (>) is in a line-item scroll region, you can use the following commands. The buttons are available only in graphical mode.

Hot Key	Button	Operation
Home		Moves to the first line item in the entire list.
Page Up		Moves to the previous screen or to the first line if you are on the first screen.
Up		Moves up one line item.
Down		Moves down one line item.
Page Down		Moves to the next screen or to the last line if you are on the last screen.
End		Moves to the last line item in the entire list.
F3		Deletes the line item in the selected line.
Insert		Inserts a line item at the selected line.
Enter		Edits or views the line item in the selected line.

## In-Field Editing Commands

When the cursor is in a field that contains information, you can use the following commands:

Hot Key	Description
Right	Moves the cursor to the right.
Left	Moves the cursor to the left.
Delete	Deletes the character the cursor is on.

---

Hot Key	Description
<b>Insert</b>	Switches insert mode on and off. When the <b>Insert</b> flag appears at the bottom of the screen, characters you enter push characters after the cursor over. When insert mode is turned off, characters you enter write over existing ones.
<b>Home</b>	Moves the cursor to the beginning of the field.
<b>End</b>	Moves the cursor to the end of the field.
<b>F9</b> (Undo)	Restores a field to the way it was before you changed it. You can use this command only while you are in the field; once you move past it, you must use the <b>Abandon (F5)</b> command.
<b>F10</b> (Delete to End of Line)	Deletes the characters in the field to the right of the cursor. If insert mode is turned off and you enter a character in the field's first position, everything in the field is deleted.
<b>Shift+F9</b> (Copy Field Contents)	Copies the contents of the current field.
<b>Shift+F10</b> (Paste Field Contents)	Pastes the value you copied from a previous field into the current field.

---

## Favorites Menu

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The **Favorites** menu operates in any of the menu formats and gives you quick and easy access to the OSAS functions you use most, allowing you to add selections for entire menus or particular functions. After you've set up the menu, you can access the functions either by pressing **F2** or by selecting **Change to Favorites** from the graphical **Favorites** pull-down menu.

With the **Favorites** menu, you save time by eliminating the need to switch between applications. For example, if you perform tasks in several applications, such as using the **Transactions** and **Cash Receipts** function in Accounts Receivable, **GL Account** function in General Ledger, and **Price and Availability** and **Item Inquiry** functions in Inventory, you can set up a **Favorites** menu rather than moving between each application. The **Favorites** menu for the graphical main menu is illustrated below.



To set up the **Favorites** menu, do the following:

1. Select the function you want to add to the menu and press **F10** (or use the right-click menu in graphical mode).
2. Press **F2** to confirm that your selection was added.

To remove a function from the menu, follow these steps:

1. Select the function on the **Favorites** menu that you want to remove.
2. Press **F10** (or use the right-click menu in graphical mode).



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## Information Menu

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The **Information** menu appears on some function screens in certain applications and gives you access to additional information about a customer, vendor, item, job, bill of material, or employee.

The commands available on the **Information** menu are determined by the applications you have installed, and can include:

- General Information
- Comments
- History
- Documents

Not all of the commands above appear on every **Information** menu; instead, commands are available only as they are relevant to the task you are performing. For example, if you are entering a transaction in Accounts Receivable, you can access comments or documents about items or customers but not about employees or vendors.

### Information

The **Information** command gives you general information about the subject. For customers, the **Information** command lists sale amounts and important dates, while for inventory items, the same command lists quantities, types, and base prices.

When the Information screen appears, enter the ID for which you want to view information. Use the commands available at the bottom of the screen to scroll between or select a new ID, then use the **Exit (F7)** command to return to the function screen from which you accessed the **Information** command.

## Comments

Use the **Comments** command when it appears to view comments added through File Maintenance functions or to add comments about a customer, item, vendor, employee, or job.

The Comments screen appears after you access the **Comments** command. The Customer Comments screen is shown below as an example.

Date	Ref	Comment
06/15/2002	003	SPOKE WITH JON RE. EMAIL CONF. AND ORDER TRACKING
01/20/2002	2	PLEASE NOTIFY JANE OF ANY SHORT SHIPMENTS.
01/20/2002	2	TRACER PUT ON LAST SHIPMENT.
01/14/2001	3	ACE AGREED TO PAY \$3000 ON 2-1.
06/04/2000	1	PLEASE NOTIFY JANE AT ACE WHEN ITEM IS MAILED.
01/04/1999	1	CALLED CUSTOMER ABOUT PAST DUE BALANCE.

1. Enter the ID for which you want to view or enter comments in the ID field at the top of the screen. The **Inquiry (F2)** command is available.
2. The ID of the terminal you are working at appears in the **Ref ID** field. To work with comments for only the default reference ID, press **Enter**. To work with comments for a different reference ID, enter that ID. To work with all comments, clear this field and press **Enter**.
3. Enter the date of the most recent comment you want to work with in the **End Date** field, or press **Enter** to work with all comments.

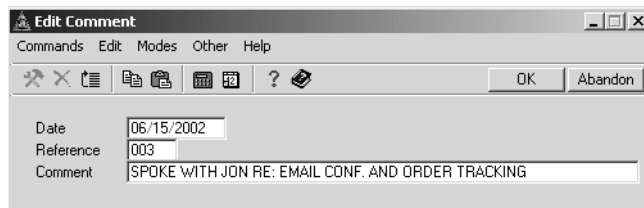
The date, reference, and text that appear for each comment depend on the reference ID and end date you enter. The comments are arranged by date—the most recent date first—then by reference ID.

4. Use these commands to work with the comments on the screen:
  - Press **R** to return to the **Ref ID** field to enter a new reference ID.
  - Press **D** to return to the **End Date** field and enter a new end date by which to sort comments.
  - Press **I** to return to the ID field and enter a new ID for which to view or enter comments.
  - Press **A** to add a new comment. The Append Comment screen appears.
  - Press **E** to edit a selected comment. The Edit Comment screen appears.
  - Press **F** to view comments for the first ID on record.
  - Press **N** to view comments for the next ID on record.
  - Press **P** to view or edit comments for the previous ID on record.
  - Press **L** to view or edit comments for the last ID on record.
  - Press **G** to go to a specific comment. This command is available only when there is more than one screen of comments.

---

## Adding or Editing Comments

The Append Comment screen appears when you add a new comment. The Edit Comments screen appears when you edit an existing comment. Other than the title, these screens are identical.



1. If you are working with a new comment, the system date appears; otherwise, the date entered for the comment you are editing appears. Accept this date, or enter a different date.
2. The current terminal ID appears in the **Reference** field. Edit this reference, if necessary.
3. Enter or edit the comment, then press **Enter** to save the comment record.

## History

When available, the **History** command gives you access to customer history in a manner similar to OSAS Inquiry functions. Select the customer for which you want to view detail information, enter a date from which to view information (if desired), then press **Enter** to view invoice or payment information.

Use the commands at the bottom of the screen to switch between or change customers, view totals, or select the line item to view. Use the **Exit (F7)** command to return to the function screen from which you accessed the **History** command.

---

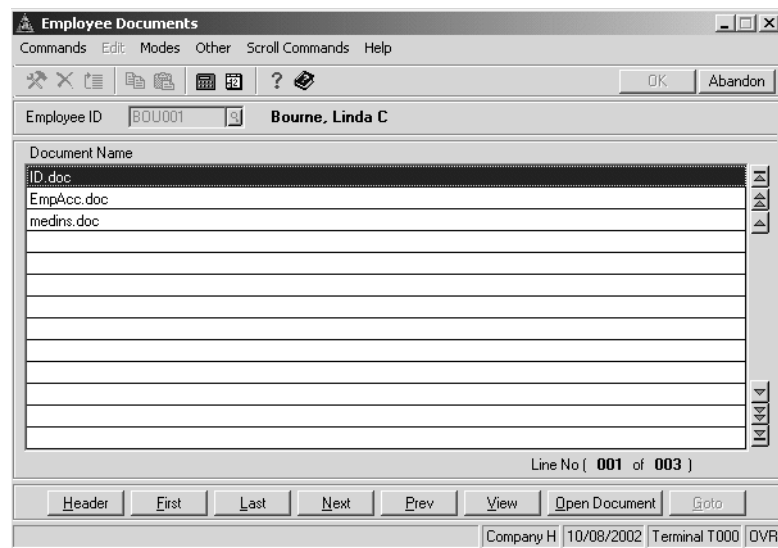
## Documents

The **Documents** command lets you view or open documents attached to certain master file records. You cannot use this command to attach a document to a record; instead, use the appropriate File Maintenance function to attach documents.

### Note

Before you can open documents, you need to have the appropriate file associations set up in the **File Types** function on the Resource Manager **Workstation Configuration** menu. The entries you make in this function help OSAS identify which software applications to use to open attached documents. See the *Resource Manager User's Manual* for more information.

The Documents screen appears after you access the **Documents** command. The Employee Documents screen is shown below as an example.



---

Enter the ID for which you want to view attached documents. The **Inquiry (F2)** command is available.

Use these commands to view document information, open an attached document, or switch between or select a new ID:

- Press **H** to return to the header section to select a new ID.
- Press **F** to view documents attached to the first ID on record.
- Press **L** to view documents attached to the last ID on record.
- Press **N** to view documents attached to the next ID on record.
- Press **P** to view documents attached to the previous ID on record.
- Press **V** to view document information. The View Documents screen appears and lists the file name, directory path, and description of the attached document. Press any key to return to the Documents screen.
- Press **O** to open the attached document in the appropriate software application. You may need to edit the Resource Manager **File Types** function in order to associate files with your preferred applications.

---

**Note**

If you have problems opening a document, return to the function in which the document was attached and edit the attachment to change the direction of the slashes used in the directory path. If the directory path contains backward slashes (\), change them to forward slashes (/) and vice versa.

---

- Press **G** to go to a specific document line. This command is available only when there is more than one screen of line items.

Use the **Exit (F7)** command to return to the function screen from which you accessed the **Documents** command when you finished viewing documents.

---

# Reports

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## Selecting a Range of Information

To produce a report, you must specify the amount of information you want in the report.

- To produce a report that includes all the available information, leave the **From-Thru** fields on the report screen blank. For example, if you want information about all the vendors to be in a report, leave the **Vendor ID From** and **Thru** fields blank.
- To limit the amount of information in the report, enter the range of information in the **From-Thru** fields. For example, if you want a report to include information only about vendor ACE001, enter ACE001 at both **From** and **Thru**. If you want the report to include information only about vendors that start with CO, enter **CO** at **From** and **COZZZZ** at **Thru**.

Each field where you enter information on a report screen usually restricts the overall output of the report. For example, if you leave the **Vendor ID From** and **Thru** fields blank, the report contains information about all the vendors. But if you enter invoice **100** in the **Invoice Number From** and **Thru** fields, and invoice **100** is assigned only to vendor ACE001, the report includes information only about vendor ACE001.

## Sorting

Information for reports is sorted first by a space (\_), then by special characters, then by digits, then by uppercase letters, and finally by lowercase letters. No matter what you enter in the **From** and **Thru** fields, however, your entries are sorted in alphabetical order (unless the function provides an option to sort the information differently).

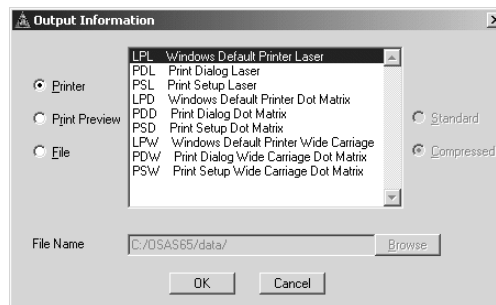
Sorting by alphabetical codes or IDs is easy. For example, the ID **ACL** comes before the ID **BB** because A comes before B.

Use caution when you enter codes or IDs consisting of characters other than letters; the order might not be what you expect. For example, if 20 items are labeled 1 through 20, and all are included in a report, you might enter **1** at **From** and **20** at **Thru**, expecting them to be listed 1, 2, 3. . . 19, 20. However, since OSAS sorts in alphabetical order, the numbers are listed in this order: 1, 10–19, 2, 20. In this example, numbers 3 - 9 are not included in the sort since they fall after 20 in an alphabetical sort. To prevent this situation, pad extra spaces in codes and IDs with zeros so that numbers in alphabetical order are also in numerical order. In the example above, the items would be labeled 000001 through 000020.

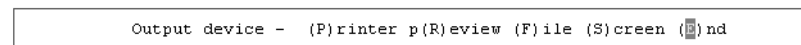
## Output the Report

The type of menus you use controls which options are available to output reports. If you are using graphical function screens, you have the following output options: **Printer**, **Print Preview**, **File**, or **E-mail** (for selected reports). If you are using text function screens, you have these options: **Printer**, **Preview**, **File**, **Screen**, or **E-mail** (for selected reports). See the following instructions for details.

If you are using graphical screens, the Output Information dialog box appears after you select the range of information to print in the report.



If you are using text screens, these options appear at the bottom of the screen after you select what to print in the report and how it is organized.



---

### Print the Report

1. Select **Printer** (in graphical screens) or enter **P** (in text screens).
2. If multiple printers are available for the terminal, either select the printer from the list or enter the appropriate code for the printer and press **Enter**.

Use the **Devices** function on the Resource Manager **Workstation Configuration** menu to add printers to the terminal.

3. When available, either select **Standard** or enter **S** if you want to print the report in standard width or select **Compressed** or enter **C** if you want to print it in compressed width.
4. Click **OK** or press **Enter** to begin printing the report.
5. If you want to stop printing after it has begun, press **Ctrl+Break**.
6. Click **OK** or press **Enter** to continue.

### View the Report using Print Preview (Windows Workstations Only)

The Print Preview option is only available for workstations running Windows. However, before Print Preview will work, you must add a **sysprint** device line in the **config.bbx** file for that printer. Use the **Devices** function on the Resource Manager **Workstation Configuration** menu to add this line.

Follow these steps to view a report using Print Preview:

1. Select **Print Preview** (in graphical screens) or enter **R** (in text screens).
2. If multiple printers are available for the terminal, either select the printer from the list or enter the appropriate code for the printer and press **Enter**.

Use the **Devices** function on the Resource Manager **Workstation Configuration** menu to add printers to the terminal.

3. Click **OK** or press **Enter** to continue.

4. When available, either select **Standard** or enter **S** if you want to view the report in standard width or select **Compressed** or enter **C** if you want to view it in compressed width.
5. Press **Enter**. The **Print Preview** screen displays the report as it will look when printed out in hard copy.
6. To print from this screen, select **Print** from the **File** menu. To exit from this screen, select **Exit** from the **File** menu.

### Save the Report as a File

To save the report as a text file, select **File** or enter **F**. The data path set up for the workstation in the **Defaults** function on the Resource Manager **Workstation Configuration** menu appears. If necessary, enter a new data path or click the **Browse** button to navigate to the correct directory, then enter the file name followed by the **.txt** extension. The file name plus extension that you enter must be less than 35 characters. Press **Enter** to save the report in that directory.

### View the Report on Screen (Text Screens Only)

If you are using text screens, you can view selected reports directly in the OSAS screen. Keep in mind that this option displays the report one page at a time, storing previously viewed pages in the workstation's memory. Use the **Defaults** function on the Resource Manager **Workstation Configuration** menu to limit the number of screen pages you can view to conserve memory resources.

Follow these steps to view the report on screen:

1. Enter **S** to select **(S)creen**.
2. When available, enter **S** if you want to view the report in standard width or **C** if you want to view it in compressed width.
3. When the report appears, press **Enter** to view the next page or **Page Up** to view previous pages.

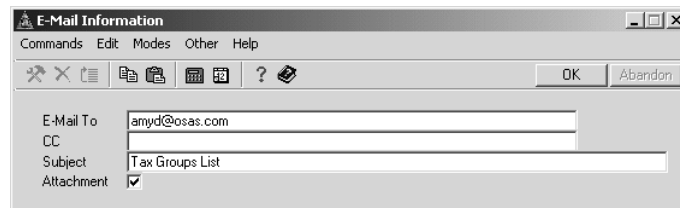
## E-mail the Report

Before you can e-mail reports, you must enter details about your e-mail system using the **E-Mail Setup** function on the Resource Manager **System File Maintenance** menu.

You can e-mail only selected reports. In general, any report or form that makes up part of your audit trail cannot be e-mailed.

Follow these steps to e-mail a report:

1. Select **E-mail** or enter **M**.
2. When available, select **Standard** or enter **S** if you want to e-mail a standard width report or select **Compressed** or enter **C** if you want to e-mail it in compressed width. The E-Mail Information screen appears.



3. If you e-mailed this report previously, the last e-mail address to which you sent the report appears. Press **Enter** to use this address, change it if necessary, or enter a new e-mail address.
4. Enter another address to send the e-mail to as a carbon copy, if necessary.
5. OSAS automatically enters the name of the report in the **Subject** field. Change this subject line, if necessary.
6. Select the **Attachment** check box (or enter **Y** in text mode) to send the report as a text file attachment to the e-mail message. If you clear this box (or enter **N** in text mode), the report is sent in the body of the e-mail.
7. Click **OK** or press **Enter** to e-mail the report.

---

## Report Commands

Use the following commands when a report appears on the screen:

<b>Key</b>	<b>Operation</b>
<b>PgUp</b>	Moves to the previous page of the report.
<b>PgDn</b>	Moves to the next page of the report.
<b>Home</b>	Moves directly to the top of a group of pages.
<b>End</b>	Moves directly to the bottom of a group of pages.
<b>F7 (Exit)</b>	Exits to the menu from any point in the report.
<b>Left</b>	Moves left one character.
<b>Right</b>	Moves right one character.
<b>Tab (Toggle)</b>	Toggles between the left and right halves of a report.
<b>Up/Down</b>	Moves a line up and down the screen to line up information when you toggle between halves of a report.

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# Installation

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# 2

Installing BASIS™ ODBC Drivers	2-3
Installation For Windows 95/98/NT/2000	2-5
Installing ODBC Drivers	2-19



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## Installing BASIS™ ODBC Drivers

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Follow these steps to install and set up the ODBC Kit on your computer:

1. Use Resource Manager to install the OSAS ODBC Kit on your computer. See the *Resource Manager Installation Manual* for installation instructions.
2. Use the **Edit CONFIG.TPM** function (page 3-3) to set up a configuration file pointing to a company.
3. Install the BASIS ODBC drivers. The BASIS ODBC driver is a 32-bit driver for Windows 95/98, Windows NT, and Windows 2000. Installing the drivers is a two-step process: you must first install the drivers on the computer, then run a separate installation program to install the drivers into the operating system.

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**Note**

If you have not installed the Windows ODBC Administrator, you may need the Windows installation disks or CDROM. Windows prompts you for the required media if it is necessary.

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**Note**

If you have single-user ODBC serial and authorization numbers, use the instructions below to install and register the ODBC drivers.

If you have a multiuser key, you must use the BASIS License Manager, and you need to register and install the license through the License Manager. Follow the instructions in the Reregistering/Reinstalling a BASIS License section in chapter 2 of the *Resource Manager Installation Manual* to install the License. Then continue with the instructions below.

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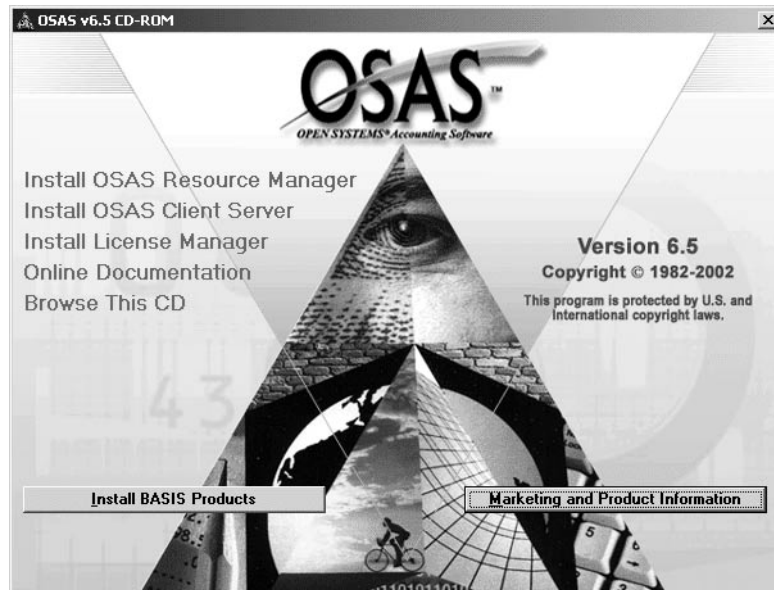
## Installation For Windows 95/98/NT/2000

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1. Start Microsoft Windows.
2. Insert the OSAS CD into your CD-ROM drive. The installation screen (shown below) should appear automatically. If it does, continue with step 6 to install ODBC. If the installation screen does not appear, continue to step 3.
3. Click **Start** and select **Run**.
4. Type the letter of the CD-ROM drive, a colon, and a backslash. Then type **autorun** to start the setup program. For example,

**d:\autorun**

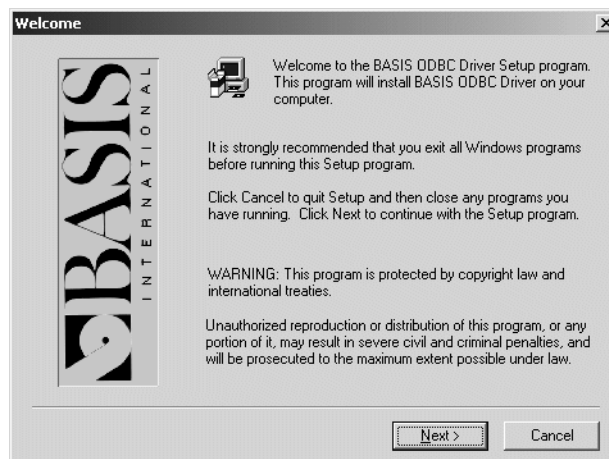
5. Click **OK**. The Main Installation screen appears:



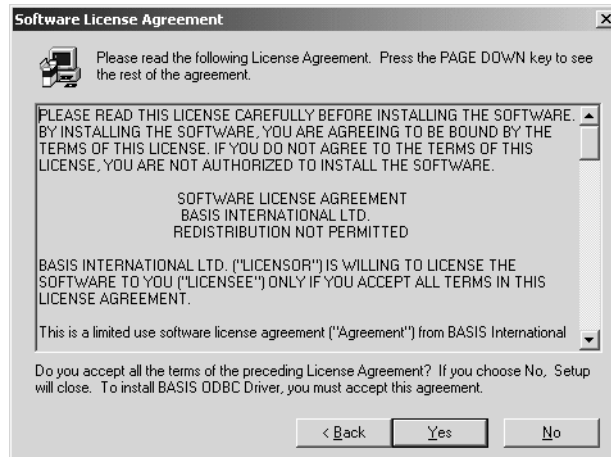
6. Click the **Install Basis Products** button. The Install Basis Products dialog box appears.
7. Click **BASIS ODBC Driver**.
8. The Choose Setup Language box appears. Select the language and click **OK**.



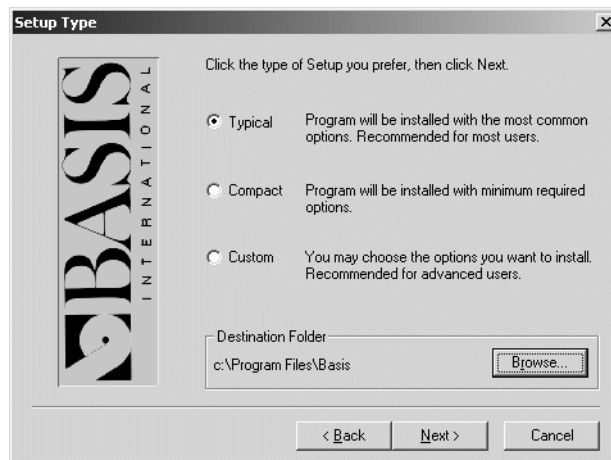
9. The BASIS Welcome screen appears next. Read the text carefully and click **Next** to continue.



10. The Software License Agreement screen appears. After you read the Software License Agreement screen text, click **Yes** to accept the agreement.



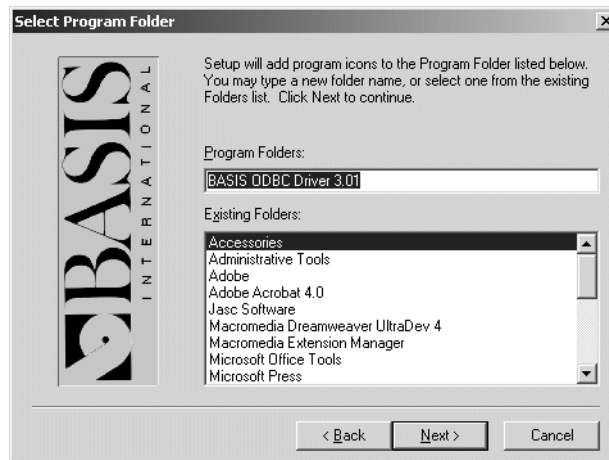
11. The Setup Type screen gives you three choices as to how to install your ODBC software. For new installations, **Typical** is recommended.



The destination folder automatically defaults to your C: drive. If you want to install ODBC on another local drive, click **Browse** and navigate to the folder you want to use.

### Typical Setup

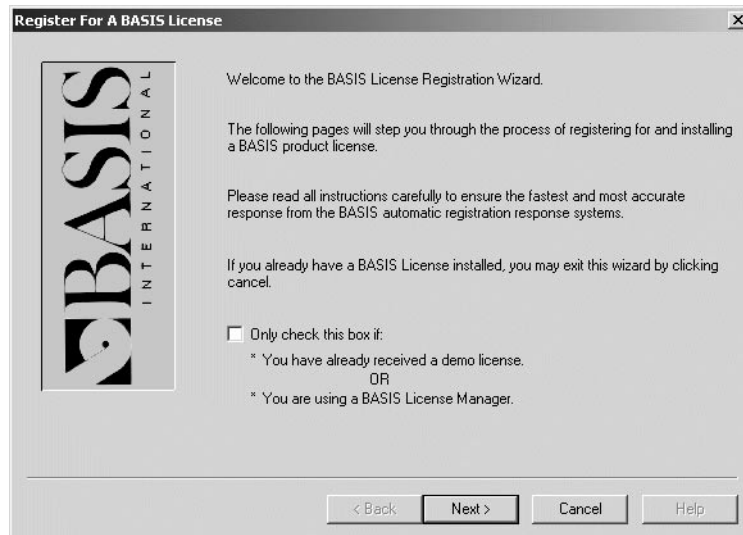
12. The Select Program Folder screen adds a folder on the drive you selected and adds a shortcut for your ODBC driver. Click **Next**.



The BASIS ODBC Driver 3.01 folder is created and the file copy begins.



13. You must now register for a BASIS license. If you have not installed a license, click **Next** and proceed to step 14. If you have already received your license file, or if you are using the BASIS License Manager, check the box, click **Next**, and continue to step 18 on on page 2-13.



14. In the License Registration Information screen fields, enter the information requested. The Serial Number and Authorization Number can be found on the BASIS License Registration Form that was included with the media. Click **Next** when finished.

**License Registration Information**

**Contact Information**  
Your contact information is confidential and will only be used to assist BASIS in further identifying your product license.

Company Name:

First Name:

Last Name:

Email Address:

Phone:

Include your area or country code

I wish to receive ongoing product information

**Product License Information**  
The Serial Number and Authorization Number are provided to you by BASIS and must be typed exactly as shown.

The Host Name provides you an easy method of identifying the Host.

Serial Number:

Authorization Number:

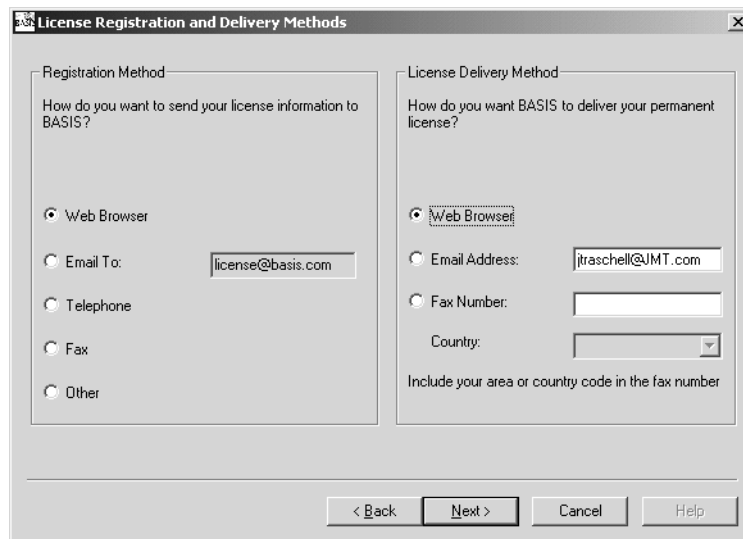
Host Name: (optional)

Host ID:

This is a notebook computer

< Back   Next >   Cancel   Help

15. The License Registration and Delivery Methods screen appears. If the computer is connected to the Internet, use the default **Web Browser** option as the registration method. If you choose any other registration method, follow the appropriate steps in Appendix G. Click **Next**.



The screenshot shows a dialog box titled "License Registration and Delivery Methods". It is divided into two main sections: "Registration Method" and "License Delivery Method".

**Registration Method:** The question is "How do you want to send your license information to BASIS?". The options are:

- Web Browser
- Email To:
- Telephone
- Fax
- Other

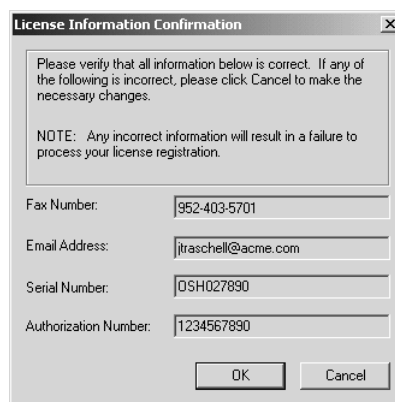
**License Delivery Method:** The question is "How do you want BASIS to deliver your permanent license?". The options are:

- Web Browser
- Email Address:
- Fax Number:
- Country:

Below the "Fax Number" field, there is a note: "Include your area or country code in the fax number".

At the bottom of the dialog box, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

16. The License Information Confirmation screen appears. Check the Serial and Authorization Numbers with those on your License Registration Form and click **OK**.



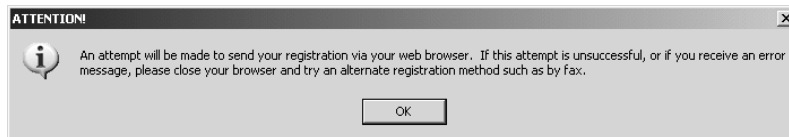
The screenshot shows a dialog box titled "License Information Confirmation". It contains a message: "Please verify that all information below is correct. If any of the following is incorrect, please click Cancel to make the necessary changes." Below this is a "NOTE: Any incorrect information will result in a failure to process your license registration."

The dialog box contains four input fields for verification:

- Fax Number:
- Email Address:
- Serial Number:
- Authorization Number:

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

17. Using the default web browser on your computer, your registration information is sent to Basis and a text file (see example below) is returned to your browser from Basis.



```
# Here is the BASIS product license file you requested.
#
# Please save this page as "C:\TEMP\BASIS ODBC Driver License.txt".
# If "C:\TEMP" does not exist, then please create it and save
# this page there. After you have done this, please run the
# "Install a BASIS License" program from your program folder
# to complete the installation of this license.
#
# DO NOT MODIFY THIS FILE
#
# Host Name: neilp
#
SERVER this_host ANY
VENDOR basis
FEATURE ODBC_RW basis 2.10 permanent uncounted 872B6COD148B \
HOSTID=00aa0053d76c ck=105 SN=OSH109780
```

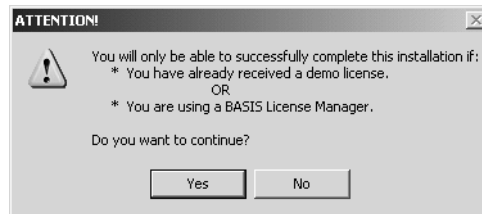
Once you receive the information, follow these instructions:

- Save the page as instructed. If the **Temp** directory does not exist, create it and save the text file in that directory.
- Return to the *BASIS ODBC Driver 3.01* folder window (created in step 12) and double-click the **Install a BASIS License** icon.

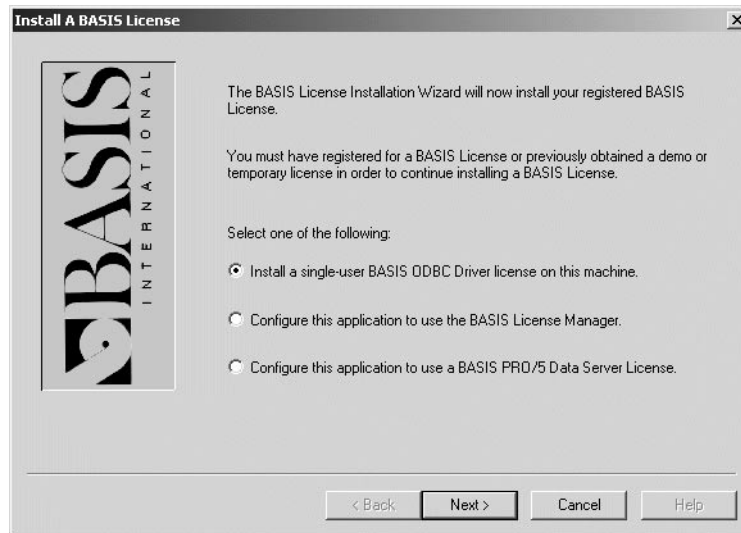
If you closed this window, click **Start**, point to **Programs**, then to **Basis ODBC Driver 3.01**, and then select **Install a Basis License** from the menu that appears.

## License Installation

18. If you have already received the license.txt file, or you are using the BASIS License Manager, this screen appears. Click **Yes**.



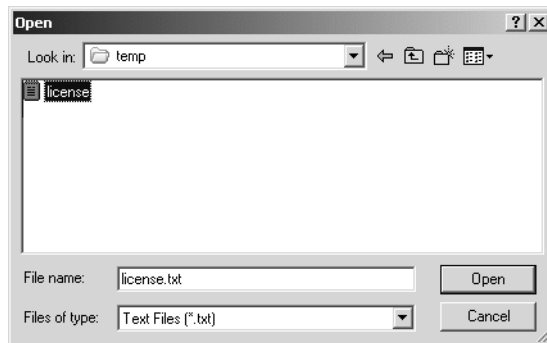
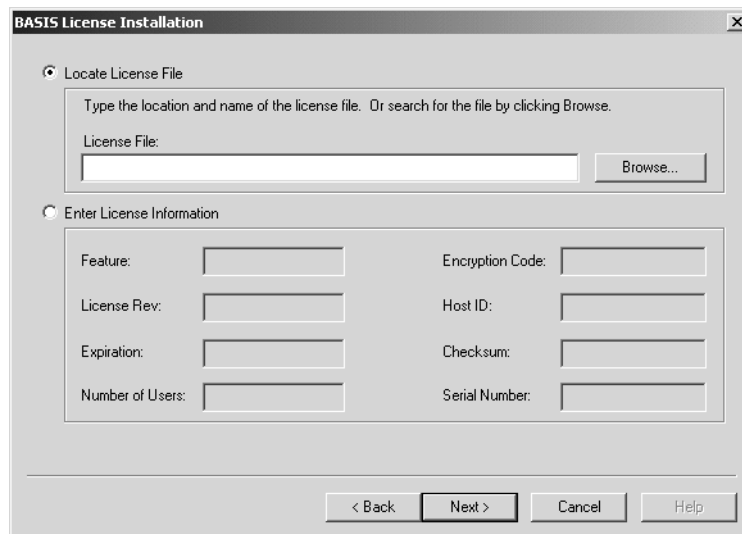
19. The Install a BASIS License screen appears.



If you are using a single-user key and you have already received the license file, click **Next**. Then continue with step 20.

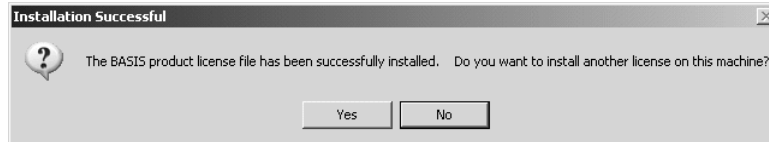
If you are using the BASIS License Manager, click **Configure this application to use the BASIS License Manager**, then click **Next**. Skip to step 23.

20. The Locate License File screen appears. Enter the path for the license.txt file or click **Browse** to navigate to the \Temp directory where it is stored. See the example below..



Click **Open** to enter the directory path in the **License File** text box on the Basis License Installation screen (shown above), then click **Next** to continue.

21. After you have located the license.txt file, the Installation Successful screen appears.



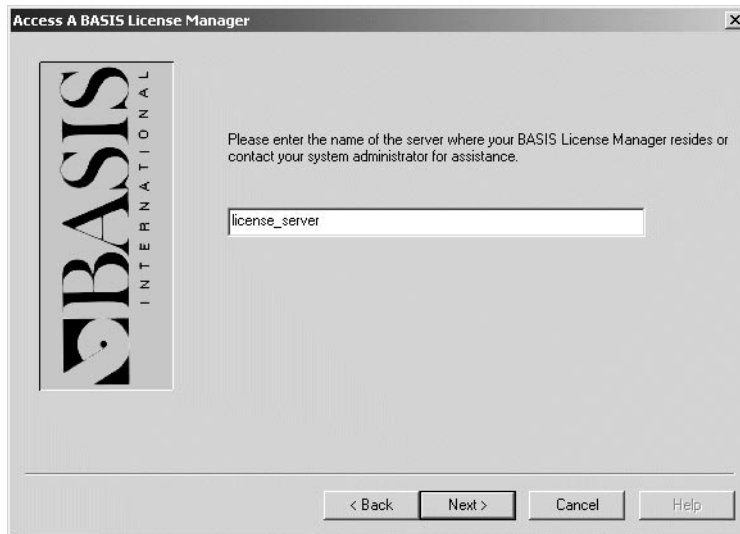
Click **Yes** to install another license and return to the the BASIS License screen. Click **No** to continue.

22. If you use OSAS<sup>CS</sup> for Windows or UNIX/Linux, enter the name of the server that is running the Data Server. If you are using standard OSAS or OSAS<sup>CS</sup> for Novell, leave the field blank.



In either case, click **Next** and skip to step 25.

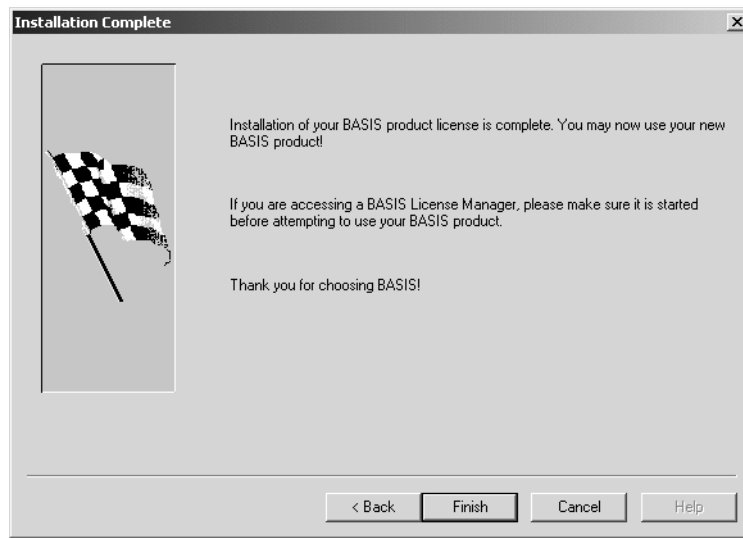
23. If you are using the BASIS License Manager, the following screen appears. Enter the name the server that is running the BASIS License Manager and click **Next**.



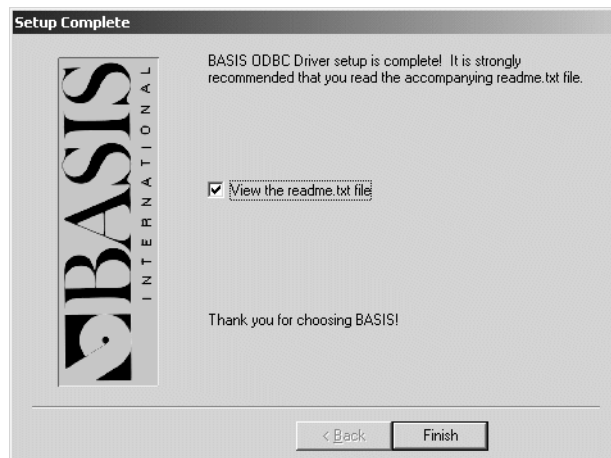
24. The Installation Successful screen appears. Click **OK** to continue.



25. Click **Finish**.



26. If you do not want to view the readme.txt file, clear the box. Otherwise, click **Finish**.



27. Before you use the ODBC driver you must:

- install the ODBC Kit from your OSAS media
- create the config.tmp file (see page 3-3)

Once you have completed these two steps, follow the instructions on on page 2-19.

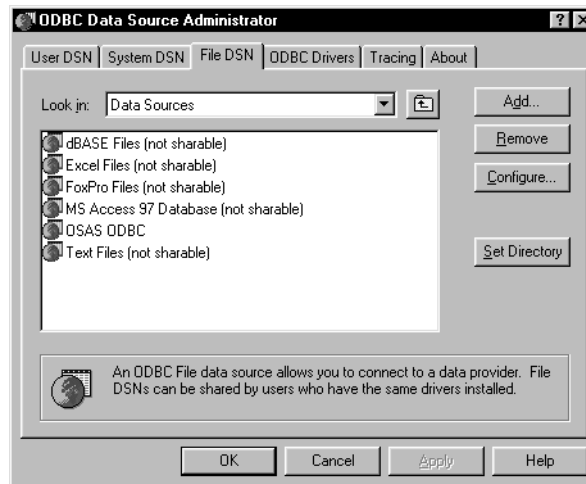
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## Installing ODBC Drivers

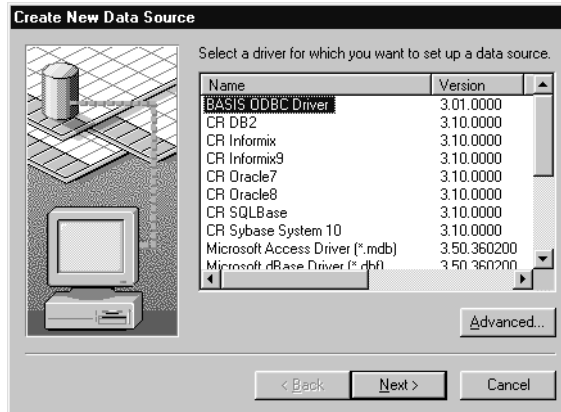
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After installing the ODBC media, you need to create and setup your ODBC drivers.

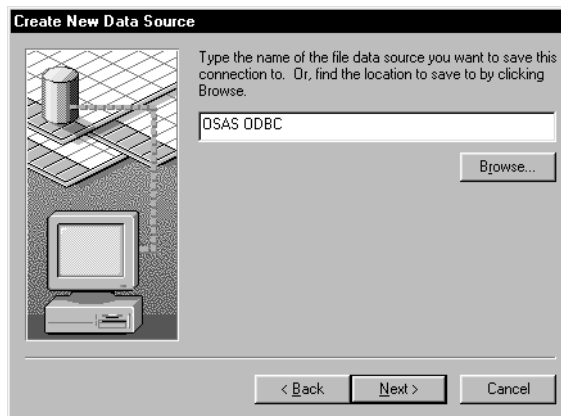
1. Click Start, point to Settings, then select Control Panel from the menu that appears. When the Control Panel opens, double-click the **32 bit ODBC Administrator** icon.
2. On the ODBC Data Source Administrator screen, select the **File DSN** tab and click **Add**.



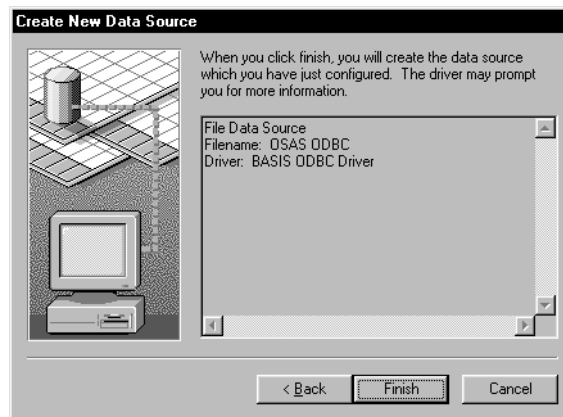
3. Select the Basis ODBC Driver entry and click **Next**.



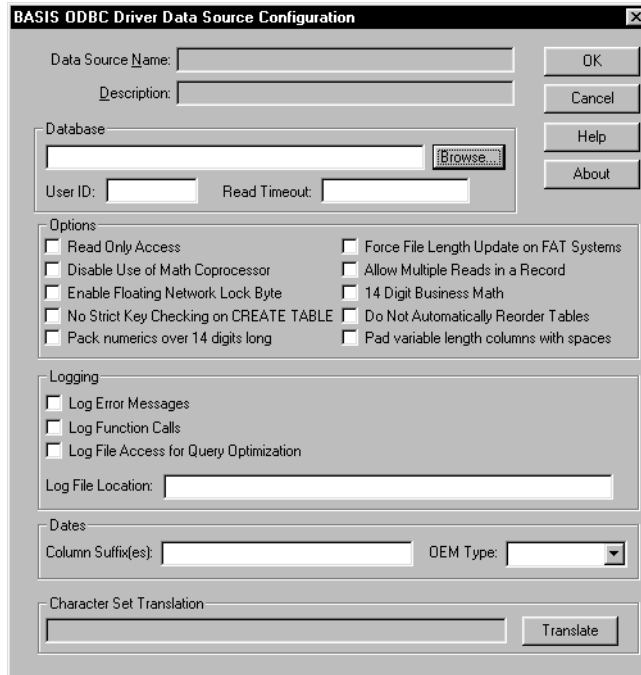
4. Enter the name for your ODBC driver, such as **OSAS ODBC** as in the example below. Click **Next**.



5. The next screen lists the information you have entered for confirmation. Verify that it is correct and click **Finish**. If the information is incorrect, click **Back** and reenter the information as needed.



- The Driver Data Source Configuration screen appears next. In the Database field, enter the path for your config.tpm file.



Click **Browse** to navigate to the directory in which the **config.tpm** file is stored.

- To enhance the usability of your ODBC driver, select the **Pad variable length column with spaces** check box.

If you are allowing only read access, select the **Read Only Access** check box.

Click **OK** to continue.

- 
8. Click **OK** to finish the ODBC setup procedure. For more information on how to manipulate data from within another application, see one of the following:

Microsoft Access      Appendix A

Microsoft Excel      Appendix B

Microsoft Query      Appendix C

Microsoft Word      Appendix D

Crystal Reports      Appendix E



---

## **Create/Edit CONFIG.TPM**

---

**3**

Edit CONFIG.TPM

3-3



---

# Edit CONFIG.TPM

---

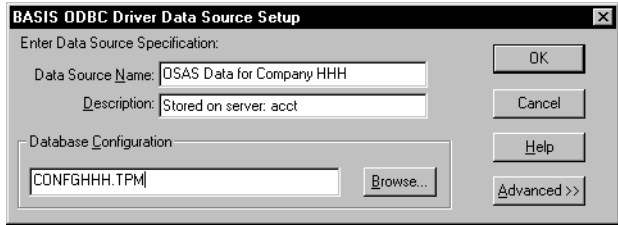
Use the **Edit CONFIG.TPM** function to create and edit database configuration files for the BASIS ODBC driver.

You must create a database configuration file for each company you want to access with the ODBC driver. If you have multiple companies, name each configuration file with some variation of the company ID and the TPM file extension. For example, if the company ID is **HHH**, the configuration file's name would be **CONFGHHH.TPM**.

**Note**

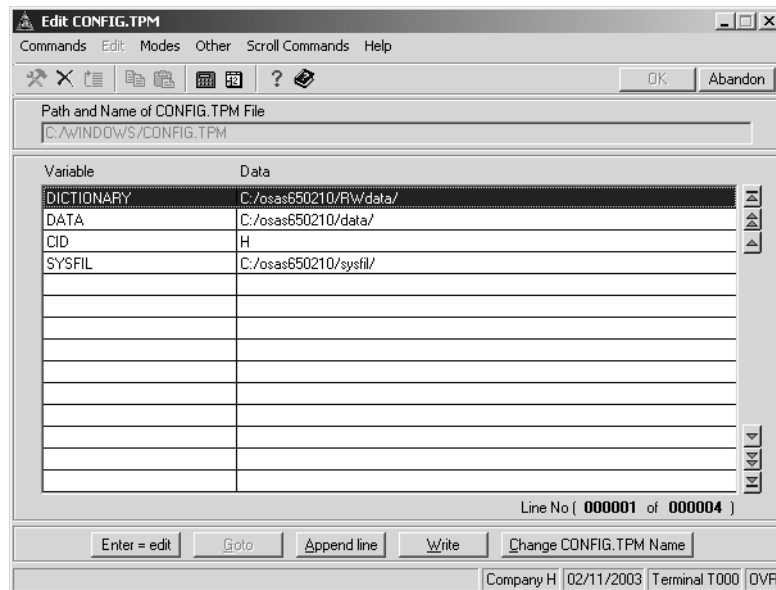
If you want to use the report applets (Microsoft Excel spreadsheets) that come with the ODBC Kit, you must store your configuration file in the **WINDOWS** directory on the C: drive of each computer where the ODBC driver is installed.

Enter the file path and database configuration file name in the **Database Configuration** field in the BASIS ODBC Driver Data Source Setup dialog box when you install the BASIS ODBC driver or when you access OSAS data using the BASIS ODBC driver.



Follow these steps to edit the CONFIG.TPM file:

1. Select **Edit CONFIG.TPM** from the **ODBC Kit** menu in OSAS. The Edit CONFIG.TPM screen appears.



2. Enter the file path and name of the database configuration file you want to edit. Enter a \ at the end of the directory path.

If you enter a new path or database configuration file name, a skeleton file is built.

3. The variables and their related data appear in the scroll region. Press **Enter** to edit the variables:
  - DICTONARY – Enter the file path to the data dictionary files.
  - DATA – Enter the file path to the company data.
  - CID – Enter the company ID for the database configuration file.
  - SYSFIL – Enter the file path to the system data files.

- 
4. Use the commands to add a new variable or save your changes:
    - Press **A** to add a new variable to the list.
    - Press **W** to save your changes.
    - Press **C** to save your changes to a new configuration file.
  5. To save your entries and exit to the main menu, press **W** and then use the **Exit (F7)** command.



---

# Dictionary Tools

---

# 4

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---

# Introduction

---

The functions on the **Dictionary Tools** menu can help you perform these tasks:

- Use the **Copy File(s) to Dictionary** function to copy definitions from one dictionary to another.
- Use the **Files** function to set up data dictionary information, create views of OSAS data files, and delete file definitions as needed.
- Use the **Fields** function to define and edit fields in the data dictionary files.
- Use the **Indexes** function to define the keys used in OSAS Mkeyed data files.
- Use the **Add/Change Reserved Words** function to add or update the words you want to flag as reserved.
- Use the **Tables** function to set up and maintain the ODBC Kit table.



---

## Copy File(s) To Dictionary

---

Use the **Copy File(s) To Dictionary** function to copy file, field, and index definitions from one data dictionary to another.

Follow these steps to copy definitions:

1. Select **Copy File(s) to Dictionary** from the **Dictionary Tools** menu. The Copy File(s) to Dictionary screen appears.

Copy File(s) to Dictionary

Commands Edit Modes Other Help

From Dictionary: 1

To Dictionary: 1

Copy:

- All Application File
- Specific File
- Base Dictionary Tables

File Name: APBT

To Name: FILE\_2

Company H | 02/11/2003 | Terminal T000 | OVR

Inquiry

2. Enter the data dictionary extension from which you want to copy definitions.

Inquiry

3. Enter the data dictionary extension to which you want to copy definitions.

4. Select the type of information to copy: **All Application Files**, a **Specific File**, or **Base Dictionary Files**.

- 
5. If you elected to copy all application files, enter the application from which you want to copy file information.

**Inquiry**

If you elected to copy a specific file, enter the name of the file from which to copy information and the name of the destination file.

6. Use the **Proceed (OK)** command to copy the definitions you selected.
7. To exit to the main menu, use the **Exit (F7)** command.

---

## Files

---

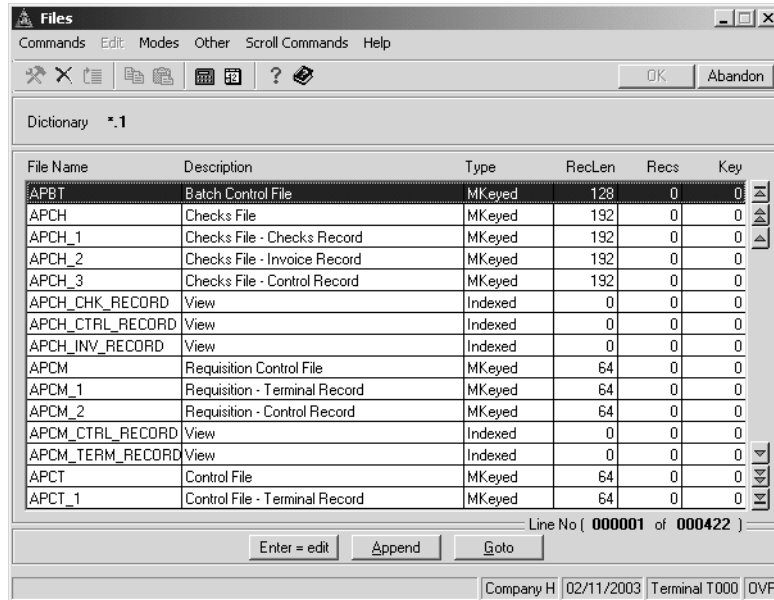
Use the **Files** function to set up and maintain data dictionary information about the data files used in OSAS programs, to construct views of the OSAS data files, and to delete unnecessary file definitions from the data dictionary. Back up data dictionary files—files with .1 as the file extension—before you delete, modify, or create files in case you make mistakes.

A *view* is a structured query language (SQL) term that represents a glimpse at the data contained in your files. The fields in a view can be from more than one file. Views can also have criteria applied. For example, a view can include vendor names and mailing addresses for a form letter, but include only vendors in a selected state. You should be familiar with SQL or become familiar with the predefined views in the data dictionary before you create new views.

You should be familiar with BB<sup>x</sup> field and file types in order to append files to the data dictionary. Back up your data dictionary files before you create files; this lets you restore the dictionaries if problems occur.

Use the **Files** function to delete unnecessary file definitions from your data dictionary to increase performance and decrease the amount of disk space used by the shadow dictionary.

Select **Files** from the **Dictionary Tools** menu. The Files screen appears and lists information about the files in the data dictionary.



The screenshot shows a window titled "Files" with a menu bar (Commands, Edit, Modes, Other, Scroll Commands, Help) and a toolbar. Below the toolbar is a "Dictionary \*1" label. The main area contains a table with the following columns: File Name, Description, Type, RecLen, Recs, and Key. The table lists various files such as APBT, APCH, APCH\_1, APCH\_2, APCH\_3, APCH\_CHK\_RECORD, APCH\_CTRL\_RECORD, APCH\_INV\_RECORD, APCM, APCM\_1, APCM\_2, APCM\_CTRL\_RECORD, APCM\_TERM\_RECORD, APCT, and APCT\_1. At the bottom of the window, there are buttons for "Enter = edit", "Append", and "Goto", and a status bar showing "Company H 02/11/2003 Terminal T000 DVR".

File Name	Description	Type	RecLen	Recs	Key
APBT	Batch Control File	MKeyed	128	0	0
APCH	Checks File	MKeyed	192	0	0
APCH_1	Checks File - Checks Record	MKeyed	192	0	0
APCH_2	Checks File - Invoice Record	MKeyed	192	0	0
APCH_3	Checks File - Control Record	MKeyed	192	0	0
APCH_CHK_RECORD	View	Indexed	0	0	0
APCH_CTRL_RECORD	View	Indexed	0	0	0
APCH_INV_RECORD	View	Indexed	0	0	0
APCM	Requisition Control File	MKeyed	64	0	0
APCM_1	Requisition - Terminal Record	MKeyed	64	0	0
APCM_2	Requisition - Control Record	MKeyed	64	0	0
APCM_CTRL_RECORD	View	Indexed	0	0	0
APCM_TERM_RECORD	View	Indexed	0	0	0
APCT	Control File	MKeyed	64	0	0
APCT_1	Control File - Terminal Record	MKeyed	64	0	0

Line No ( 000001 of 000422 )

Enter = edit   Append   Goto

Company H 02/11/2003 Terminal T000 DVR

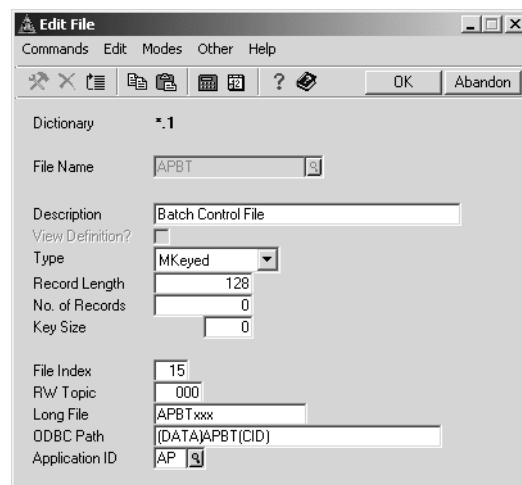
Each entry shows you the file name, description, type (Mkeyed or Indexed), record length, number of records, and number of keys for that file in the data dictionary.

Use the commands to work with the files in the dictionary:

- Press **Enter** to edit information about the selected entry. The Edit File screen (page 4-9) appears.
- Press **A** to add a file to the list. The Append File screen (page 4-9) appears.
- Press **G** to go to a specific file in the list.
- Use the **Exit (F7)** command to save your changes and return to the main menu.

## Append/Edit File Screen

The Append File screen appears when you add a new file to the list. The Edit File screen appears when you edit an existing file in the data dictionary. Other than the names, these two screens are identical. The Edit File screen is shown below.



### Inquiry

1. Enter the **File Name** and **Description**.
2. If the file is a view, select the **View Definition?** check box (or enter **Y** in text mode); if not, clear the box (or enter **N** in text mode).
3. Enter the file type:
  - I** = Indexed
  - L** = Serial
  - K** = Keyed
  - S** = String
  - P** = Program
  - D** = Directory
  - M** = Mkeyed
4. Enter the file record length and number of records the file contains.

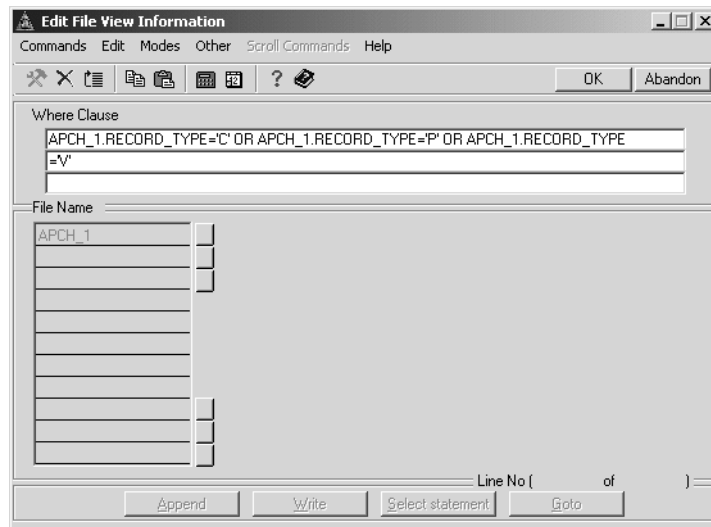
- 
5. Enter the **Key Size** if the file is a single keyed or Mkeyed file.
  6. Enter the **File Index** on which the file is usually opened.
  7. Enter the GENERAL Report Writer topic within OSAS software.
  8. Enter the **Long File Name** for the file.
  9. Enter the path ODBC uses to see the file. Use the variables (DATA) to specify the data path and (CID) to specify a company-specific file. These variables are defined in the CONFIG.TPM file.

**Inquiry**

10. Enter the application ID for the file.
11. If the file is a view, press **PgDn** to enter the SQL WHERE clause selection criteria used to select the data in the view. See “Edit File View Information Screen” on page 4-11 for more information.
12. Use the **Proceed (OK)** command to save your changes and return to the Files screen.

## Edit File View Information Screen

The Edit File View Information screen appears when you add or edit a view and then press **PgDn** to view the WHERE clause that selects data for the view.



The screen lists the WHERE clause selection criteria and the files from which fields are drawn to make up the view.

1. Enter or edit the SQL WHERE clause selection criteria. Use single quotation marks around strings. For example, a valid clause might be:

**APVE.VENDORID = 'ACE001'**

2. Press **Enter** to continue to the File Name section to specify the files to include in the view.
3. Use the commands to work with files:
  - Press **A** to add a new file to the list.
  - Press **W** to save your changes and return to the Files screen.
  - Press **S** to return to the **Where Clause** field.



## Fields

Use the **Fields** function to define and edit the fields in the data dictionary files.

Unless you are working with views, you must be familiar with BB<sup>x</sup> field types and the file layout in order to define fields. If you are working with a view, build the field definitions from existing files with the **Build view from file** command.

Select **Fields** from the **Dictionary Tools** menu. The Fields screen appears.

The screenshot shows a window titled 'Fields' with a menu bar (Commands, Edit, Modes, Other, Scroll, Commands, Help) and a toolbar. Below the toolbar, the 'Dictionary' is set to '\*.1' and the 'File Name' is 'APBT Batch Control File'. The 'File Size' is 128 and the 'Soft Size' is 54. A table lists the fields in the dictionary:

Field Name	Description	Type	Len	Notes
BATCH_ID	Batch ID	C	6*	
LOCK_FLAG	Lock Flag	C	4*	Term ID or blan
DESCRIPTION	Description	C	25*	
STATUS_PURCH_JRN	Status - Purchase Journal	C	1*	U = Unprinted~P
STATUS_DEBIT_JRN	Status - Debits Journal	C	1*	U = Unprinted~P
STATUS_RCPT_JRNL	Status - Receipts/Invoice	C	1*	U = Unprinted~P
RESERVED_OSD1	Reserved for OSD	C	1*	
BATCH_STATUS	Batch Status	C	1*	H = Hold
RESERVED_OSD2	Reserved for OSD	N	1*	
RESERVED_OSD3	Reserved for OSD	N	1*	
RESERVED_OSD4	Reserved for OSD	N	1*	

At the bottom of the window, there are buttons for 'Enter = edit', 'Append', 'Write', 'Build view from file', and 'Goto'. The status bar shows 'Line No ( 0001 of 0011 )', 'Company H', '02/11/2003', 'Terminal T000', and 'DVR'.

### Inquiry

After you select a **File Name** and press **Enter**, the screen lists the file size and soft size—the total of all field lengths added together plus the total number of fields in the file—and the field name, description, field type, and notes for all fields contained in the file.

Use the commands to work with the fields in the file:

- Press **Enter** to edit the selected entry. The Edit Fields screen appears.
- Press **A** to add a new field to the list. The Append Fields screen appears.
- Press **W** to save your changes.
- Press **B** to build fields from a file. This command is only available when the selected entry is a view. Enter the file name from which to build the fields in the **Enter File to Copy From** field that appears and press **Enter**.
- Press **G** to go to a specific field in the list.

To save your entries and return to the main menu, press **W** and then use the **Exit (F7)** command.

## Append/Edit Fields Screen

The Append Fields screen appears when you add a new field to the list; the Edit Fields screen appears when you edit an existing field. Other than the name, these screens are identical.

The screenshot shows the 'Edit Field' dialog box with the following details:

- Field Number:** 0003
- Field ID:** VENDOR\_ID
- Description:** View Column
- Orig. Field:** APCH\_2.VENDOR\_ID
- Field Type:** Character
- Numeric Type:** (dropdown menu)
- Variable Length?:** (checkbox)
- Field Terminator:** 0
- Field Length:** 20
- Array Elements:** 0
- RW Name:** (text field)
- Variable:** (text field)
- Template:** (text field)
- Notes:** A list of 10 numbered rows for entering notes.

**Inquiry**

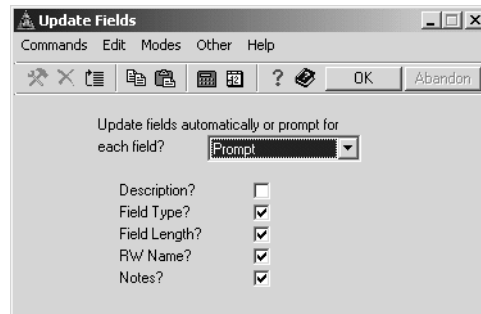
1. Enter the **Field ID**. Any word you enter is checked against the reserved word file, and a warning appears if you enter a reserved word. A reserved word is a key word from a third-party ODBC and SQL language that should not be used for field names.
2. Enter the field's **Description**.
3. If you edited a field from a view, the **Orig. Field** field appears and lists the file the field was pulled from for the view and the original field name. Edit this information, if necessary.

This field does not appear for regular fields contained within files.

4. Enter the **Field Type**:
  - C** = Character
  - N** = Numeric
  - U** = Unsigned Integer
  - I** = Signed Integer
  - F** = IEEE Float
  - D** = BCD Float
  - B** = Business Math
  - X** = 'C' Float
  - Y** = 'C' Double
5. In the **Numeric Type** field, enter **B** if the numeric is a Boolean, **J** if the numeric is a date, or **O** if the numeric is any other numeric. If the field type is non-numeric, this field is not available.
6. If the field is of variable length and requires a field terminator, select the **Variable Length?** check box (or enter **Y** in text mode); if not, clear the check box (or enter **N** in text mode).
7. Enter the length of the field in bytes in the **Field Length** field. The **Array Elements** field is set to **1** and cannot be changed.
8. Enter the name to be used for the field in GENERAL Report Writer in the **RW Name** field.

9. In the **Variable** field, enter the variable ID to be used to represent the field. If this application uses string templates, leave the field blank.
10. Enter the string template ID.
11. Enter any descriptive notes about the field in the **Notes** fields.
12. To save your entries, use the **Proceed (OK)** command. You are returned to the Fields screen. Press **W** to save your changes to the file.

Other files are scanned for field names that match any you changed. If data changes have been made, the Update Fields screen appears to update other fields with changed data.



- Enter **Automatic** (or press **A**) to automatically update fields through the system; enter **Prompt** (or press **P**) if you want to be prompted for every field to be appended or changed.
- If you want to update the type of information listed in related fields with your changes, select the check box or enter **Y**; if not, clear the check box or enter **N**.
- Use the **Proceed (OK)** command to update related fields. If you selected **Prompt** or entered **P**, you are prompted to enter the information you want to update for each related field.



## Append/Edit Indexes Screen

The Append Indexes screen appears when you add a new index to the file. The Edit Indexes screen appears when you edit an existing index. Other than the title, these screens are identical.

The screenshot shows the 'Edit Index' window with the following data:

Seq	Field	Description	Type	Fld	Pos	Len	Disc	Uniq	Bus
001	RECORD_TYPE	Record Type	C	2	1	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
002	VENDOR_ID	Vendor ID	C	3	1	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
003		Invoice Number	C	3	7	8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
004		Invoice Sequence No	C	3	15	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
005	SEQUENCE_NUMB	Sequence Number	C	1	1	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Index ID: RTYP\_VEND\_INV      Key Number: 1

Line No ( 000001 of 000005 )

Buttons: Enter = edit, Append, Description, Goto

You cannot edit the index segments in the scroll region directly. Instead, press **Enter** to edit an index entry. For descriptions of each of the fields on this screen, see “Append/Edit Segments Screen” on page 4-19.

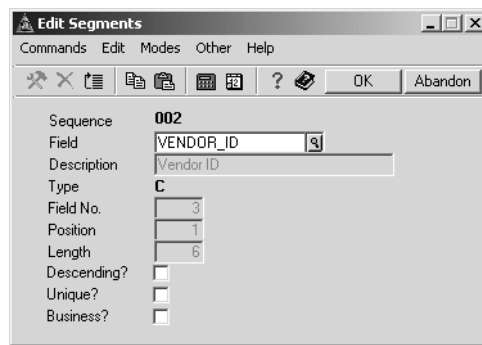
Use the commands to work with the segments that make up the index key:

- Press **Enter** to edit the selected segment. The Edit Segments screen appears.
- Press **A** to add a new index segment to the list. The Append Segments screen appears.
- Press **D** to return to the **Index ID** field to edit the index description.

Use the **Exit (F7)** command to save any changes and return to the Indexes screen.

## Append/Edit Segments Screen

The Append Segments screen appears when you add an index segment to the list on the Edit Indexes screen; the Edit Segments screen appears when you edit an existing segment. Other than the title, these screens are identical.



1. The segment's Sequence number appears and cannot be changed. To change this number, return to the Append/Edit Indexes screen and use the **Delete (F3)** and **Append** commands to rearrange segment entries.

### Inquiry

2. Enter the field name to use in the segment, or leave the field blank if the segment consists of more than one field. If you enter a field name, the following information appears and cannot be changed. Use the **Fields** function (page 4-13) to edit this information.
  - Description
  - Type (**C** for character, **N** for numeric)
  - Field number
  - Starting position of the field in a string
  - Total length of the field
3. Select the **Descending?** check box (or enter **Y** in text mode) if the field is in descending sort order; if not, clear the check box (or enter **N**).
4. Select the **Unique?** check box (or enter **Y**) if the field is a unique field; if not, clear the check box (or enter **N**). Enter **N** for standard OSAS files.

- 
5. Select the **Business?** check box (or enter **Y**) if the field is a business math type and must be sorted as such; if not, clear the check box (or enter **N**). Enter **N** for standard OSAS files.

Your choices for the above three options appear on the Append/Edit Indexes screen.

6. Use the **Proceed (OK)** command to save your changes and return to the Append/Edit Indexes screen.

---

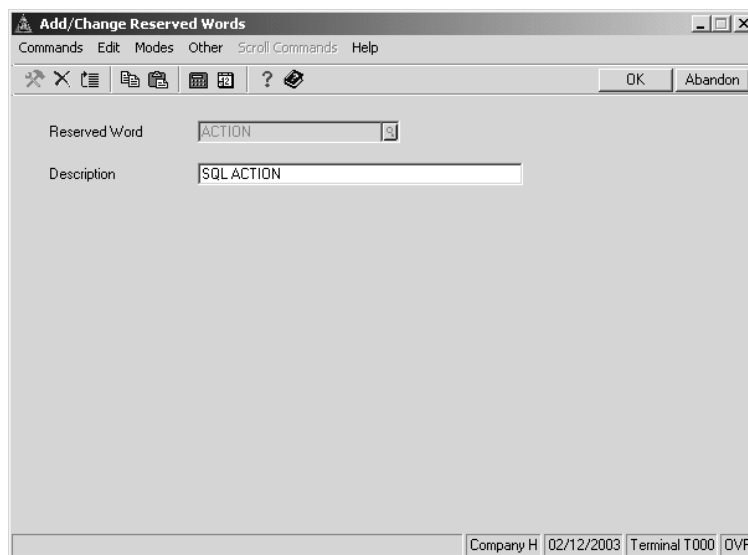
## Add/Change Reserved Words

---

Use the **Add/Change Reserved Words** function to add or update the file of reserved Structured Query Language (SQL) words or to other words you want flagged as reserved. You cannot use reserved words as field IDs or names.

To add or change reserved words:

1. Select **Add/Change Reserved Words** from the **Dictionary Tools** menu. The Add/Change Reserved Words screen appears.



**Inquiry**

2. Enter the word to add or edit in the **Reserved Word** field.
3. Enter or edit the reserved word's description.
4. To delete a reserved word, use the **Delete (F3)** command.
5. Use the **Proceed (OK)** command to save your changes and return to the main menu.



---

# Tables

---

Use the **Tables** function to set up and maintain the ODBC Kit table. Tables store information about the system, data, options, and default settings for other applications.

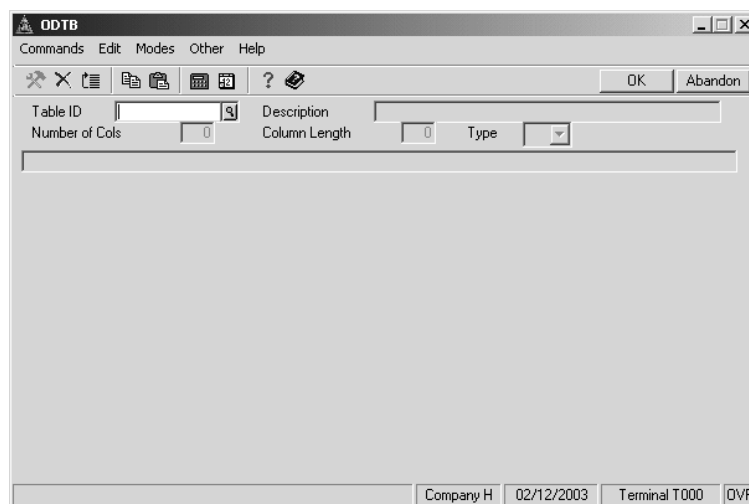
The **ODEXTxxx** and **OPT** tables are related to the ODBC Kit. For more information about the **ODEXTxxx** table, see its description in this section.

The **OPT** (Options) tables store options and interfaces settings. Maintain the information stored in this table through the **Options and Interfaces** function on the Resource Manager **Company Setup** menu, not through the table itself.

## ODEXTxxx Table

The **ODEXTxxx** table stores the data dictionary file extension in use for the current terminal, where **xxx** is the current terminal ID. Follow these steps to access the table and change the file extension, if necessary:

1. Select **Tables** from the **Dictionary Tools** menu. The Tables screen appears.



You can use this screen to add a new table, copy an existing table, delete a table, or set up terminal-specific or company-specific tables. See the *Resource Manager User's Manual* for more information.

Inquiry

2. Enter **ODEXTxxx** (where **xxx** is the current terminal ID) in the **Table ID** field. The remainder of the **ODEXT** field appears.

The screenshot shows the ODTB application window. The 'Table ID' field is populated with 'ODEXT000'. The 'Description' field contains 'Current Data dictionary'. The 'Number of Cols' is set to 1, 'Column Length' is 3, and 'Type' is A. The table below has one row with the value '1' under the 'Dic' header. The status bar at the bottom indicates the current company is 'H', the date is '02/12/2003', the terminal is 'T000', and the user is 'DVR'.

3. Change the data dictionary file extension (**1** in the above example) for the current terminal as necessary.
4. Use the **Proceed (OK)** command to save your changes, then use the **Exit (F7)** command to return to the main menu.

---

# Dictionary Reports

---

# 5

Printing a Dictionary Report	5-3
Dictionary Field List	5-5
Audit Field Names For Reserved Words	5-7
Reserved Words List	5-9



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## Printing a Dictionary Report

---

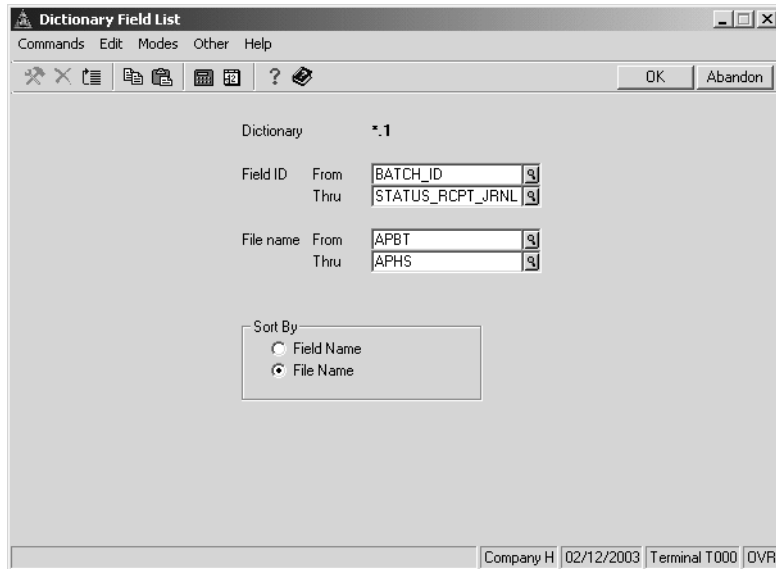
Use the functions in this chapter to print reports that contain information about the information in your data dictionary. The following reports are available:

- Use the **Dictionary Field List** function to print a report listing all field names across files for verification and consistency.
- Use the **Audit Field Names for Reserved Words** function to check for the use of reserved words in applications.
- Use the **Reserved Words List** function to print a list of all reserved words in the data dictionary.

All dictionary reports are produced in the same way. Use the instructions on the next page to print a report, modifying the procedure as necessary for the report you are printing. For example, if the screen for the report you want to print does not contain sort by options, ignore that step and continue to the next.

Follow these steps to print a dictionary report:

1. Select the report you want to print from the **Dictionary Reports** menu. The selection screen for that report appears. The Dictionary Field List screen is shown below as an example.



**Inquiry**

2. Select the range of information to include in the list in the **From** and **Thru** fields. The **Inquiry (F2)** command is usually available for these fields to let you select beginning and end range values from the list that appears.

Leave these fields blank to include all values in the list.

3. If the screen contains options that control how information is sorted, select the option you want to use to sort the information. You can select only one sort option.
4. Select the output device to begin printing the report. See “Output the Report” on page 1-58 for more information. After the report is produced, the **Dictionary Reports** menu appears.

## Dictionary Field List

Use the **Dictionary Field List** function to produce a printout by field name across files. Use the list to verify the consistency of field names in related files.

### Dictionary Field List

02/12/2003 10:03 AM		Builders Supply Dictionary Field List			Page 1
Field	File	Description	Format	Notes	RW Name
BATCH_ID	APBT	Batch ID	C	6	BATCH_ID
BATCH_STATUS	APBT	Batch Status	C	1 H = Hold	BATCH_STAT
DESCRIPTION	APBT	Description	C	25	DESCRIPTION
LOCK_FLAG	APBT	Lock Flag	C	4 Term ID or blank	LOCK_FLAG
RESERVED_OSD1	APBT	Reserved for OSD	C	1	
RESERVED_OSD2	APBT	Reserved for OSD	N	1	
RESERVED_OSD3	APBT	Reserved for OSD	N	1	
RESERVED_OSD4	APBT	Reserved for OSD	N	1	
STATUS_DEBIT_JRN	APBT	Status - Debits Journal	C	1 U = Unprinted P = Printed R = Reprint N = Not Appl.	DEBITS_JOURNAL_STAT
STATUS_PURCH_JRN	APBT	Status - Purchase Journal	C	1 U = Unprinted P = Printed R = Reprint N = Not Appl.	PURCH_JOURNAL_STAT
STATUS_RCPT_JRNL	APBT	Status - Receipts/Invoice Journal	C	1 U = Unprinted P = Printed R = Reprint N = Not Appl.	RCPT_INV_JRNL_STAT
GENERAL_ALPHA_1	APCH	General Alpha 1	C	6	
GENERAL_ALPHA_2	APCH	General Alpha 2	C	8	
GENERAL_ALPHA_3	APCH	General Alpha 3	C	6	
GENERAL_ALPHA_4	APCH	General Alpha 4	C	16	
GEN_NUMERIC_1	APCH	General Numeric 1	N	14	
GEN_NUMERIC_2	APCH	General Numeric 2	N	14	
GEN_NUMERIC_3	APCH	General Numeric 3	N	14	
GEN_NUMERIC_4	APCH	General Numeric 4	N	14	
GEN_NUMERIC_5	APCH	General Numeric 5	N	14	



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## Audit Field Names For Reserved Words

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Use the **Audit Field Names for Reserved Words** function to validate an application for reserved words or check all applications for reserved words.

### Audit Field Names For Reserved Words List

02/12/2003	Builders Supply	Page	1
10:04 AM	Audit Field Names for Reserved Words		
File ID	Field Name	Description of Reserved Word	
-----			
APHS_1	YEAR	SQL YEAR	
APHS_2	YEAR	SQL YEAR	
APHS_3	YEAR	SQL YEAR	
APHS_COMP_RECORD	YEAR	SQL YEAR	
APHS_ITEM_RECORD	YEAR	SQL YEAR	
APHS_VEND_RECORD	YEAR	SQL YEAR	
APUC	DATE	SQL DATE	
End of Report			



---

## Reserved Words List

---

Use the **Reserved Words List** function to printout a list of all the reserved SQL words.

### Reserved Words List

Reserved Word	Description
ABSOLUTE	SQL ABSOLUTE
ACTION	SQL ACTION
ADD	SQL ADD
ALL	SQL ALL
ALLOCATE	SQL ALLOCATE
ALTER	SQL ALTER
AND	SQL AND
ANY	SQL ANY
ARE	SQL ARE
AS	SQL AS
ASC	SQL ASC
ASSERTION	SQL ASSERTION
AT	SQL AT
AUTHORIZATION	SQL AUTHORIZATION
AVC	SQL AVC
BEGIN	SQL BEGIN
BETWEEN	SQL BETWEEN
BOTH	SQL BOTH
BREAK	SQL BREAK
BROWSE	SQL BROWSE
BULK	SQL BULK
BY	SQL BY
CASCADE	SQL CASCADE
CASCADED	SQL CASCADED
CASE	SQL CASE
CAST	SQL CAST
CATALOG	SQL CATALOG
CHARACTER	SQL CHARACTER
CHARACTER_LENGTH	SQL CHARACTER_LENGTH
CHAR_LENGTH	SQL CHAR_LENGTH
CHECK	SQL CHECK
CHECKPOINT	SQL CHECKPOINT



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# Microsoft Access

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# A

This appendix walks you through opening a simple form using the ODBC Kit with Microsoft Access 97 and higher. If you require more information about Microsoft Access, consult the Microsoft Access User's Guide or Online Help.

Please note that the appendix uses Microsoft Access 97 in the example illustrations. If you are using a more recent version of Access, the commands and interface may differ slightly.

Before you can create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Access.

The Microsoft Access example—ACCEXAMP.MDB—which contains two reports and two inquiry forms is included in the ODBC Kit.

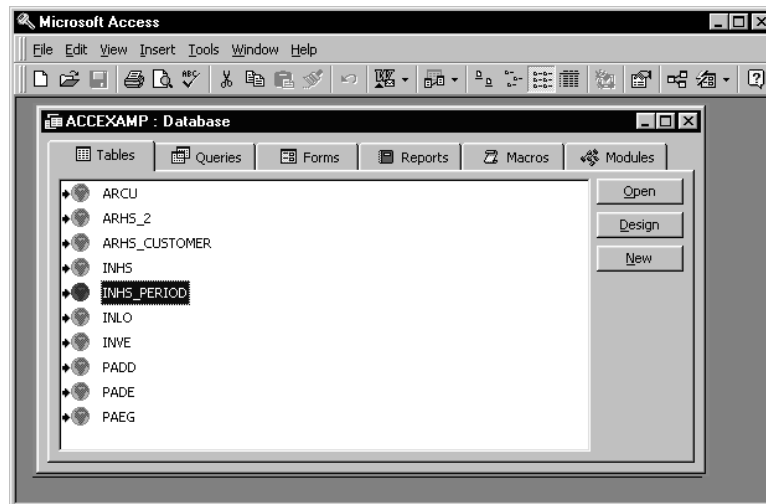
You can find additional information about using ODBC with Microsoft Access on the Open Systems web page on the Internet at <http://www.osas.com>.

## To Work With a Sample Form

1. Start Microsoft Access. If you have security set up, enter your user name and password. The Microsoft Access dialog box appears.



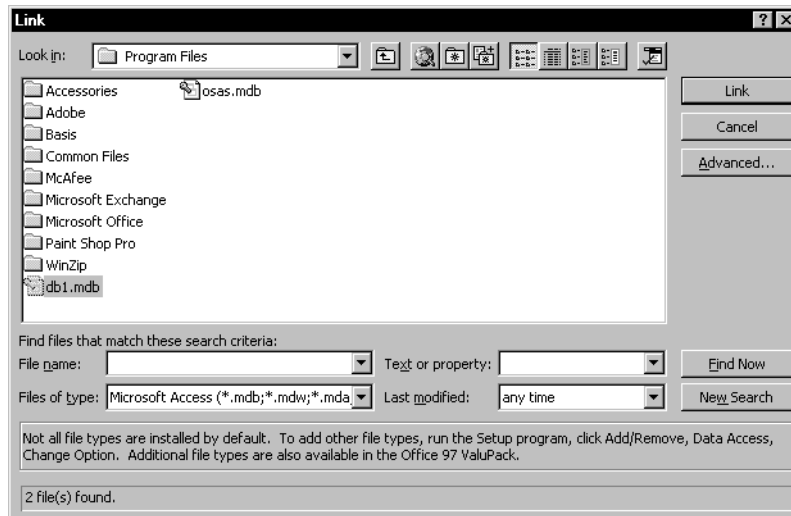
2. Select the sample database, ProfitHistory.mdb (listed in the example above as **ACCEXAMP**). Click **More Files** to navigate to the database, if necessary.
3. The database container appears.



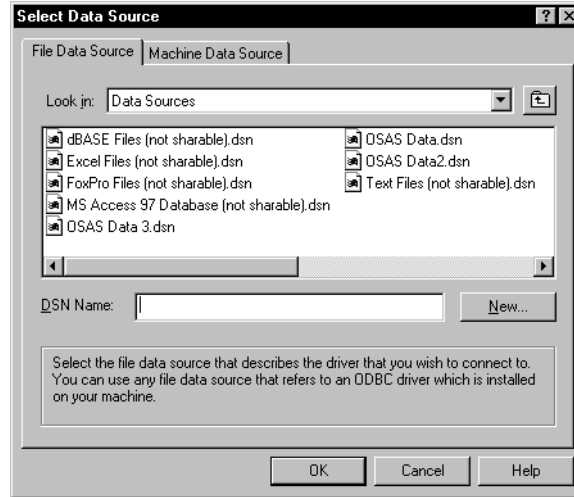
## To Link Tables to Microsoft Access

If you encounter problems with the existing table links in the sample data base, delete them and follow these steps:

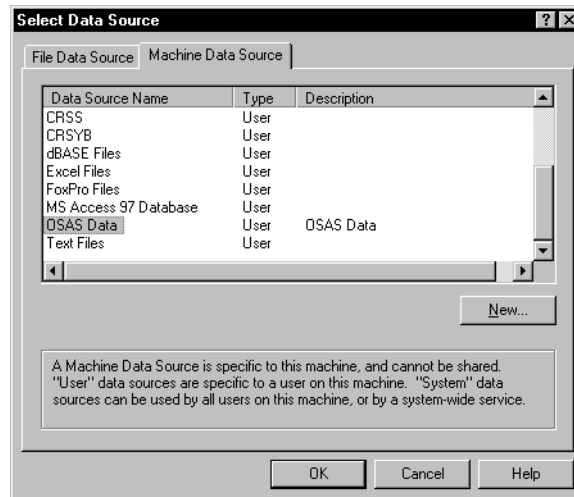
1. From the **File** menu, select **Get External Data** and **Link Tables**, or right-click the database container and select **Link Tables** from the menu that appears. The Link dialog box appears.



2. Select **ODBC Database** in the **Files of type** list box. The Select Data Source dialog box appears.



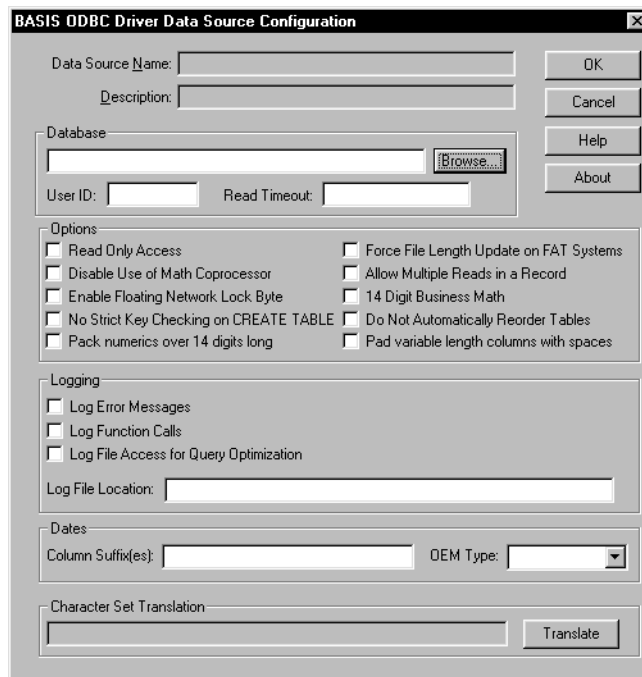
3. Click the **Machine Data Source** tab.



4. If you have set up an OSAS ODBC machine data source, select it and click **OK**. Otherwise, click **New**.

Clicking **New** starts a data source creation wizard that will guide you through the process for setting up a new data source. Refer to chapter 2 for instructions on creating a new data source.

The BASIS ODBC Driver Data Source Setup screen appears.



5. Enter a name and description for the data source. Click **Browse** to locate the CONFIG.TPM file you set up using the **Edit CONFIG.TPM** function (page 3-3) in OSAS.

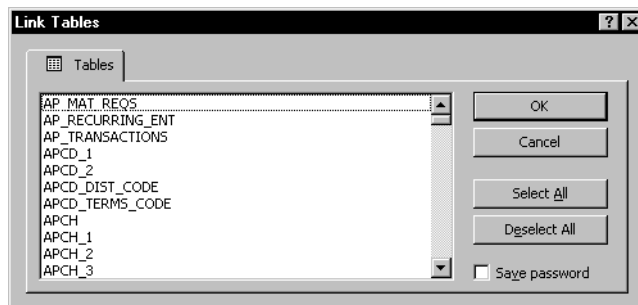
If you have used the ODBC drivers and already created the shadow dictionaries, click **Advanced**. In the additional fields that appear, select the **No Shadow Dictionary Consistency Check** and the **Fast Connect** check boxes to increase the performance of the ODBC drivers.

**Note**

If you are using OSAS<sup>CS</sup> and you use the data server to access your data, enter your login name in the **Network User ID** field.

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6. Click **OK** to connect to the data source. The Link Tables screen appears.

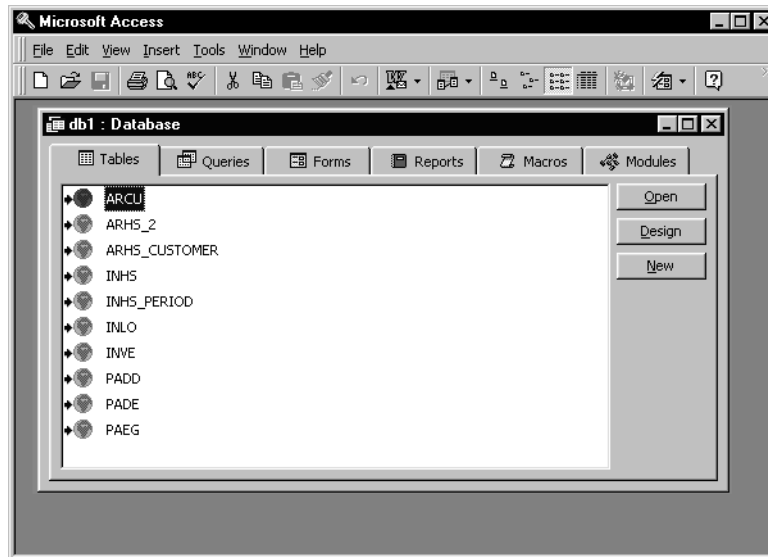


7. Select the following tables for the samples in the sample database:

- ARCU
- ARHS\_2
- ARHS\_CUSTOMER
- INHS
- INHS\_PERIOD
- INLO
- INVE
- PADD
- PADE
- PAEG

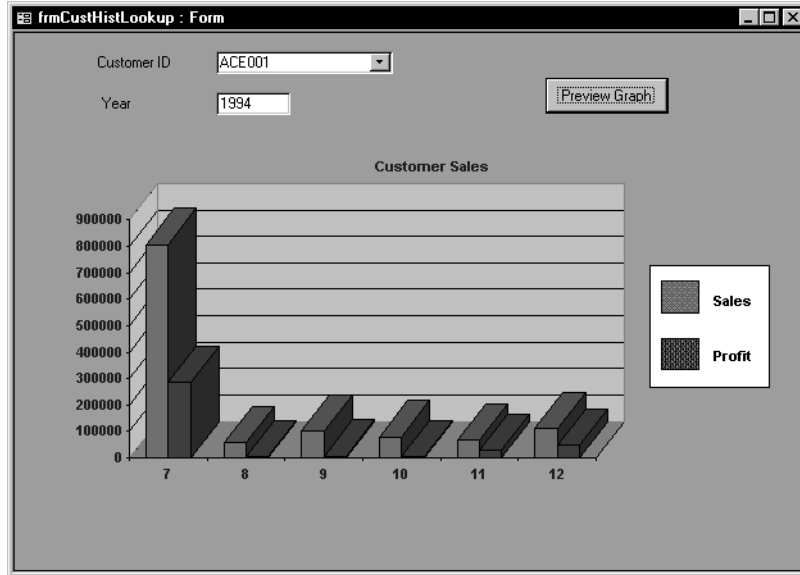
8. Click **OK**. As the OSAS files are linked to the Microsoft Access database, you are prompted for keyed fields in the OSAS files. Select the keyed fields in the dialog box that appear.

You are returned to Microsoft Access. The linked tables appear.



9. Click the **Forms** tab.
10. Click **frmCustHistLookup** on the **Forms** tab. The Customer History Form appears.

11. Select a **Customer ID** and enter a **Year**. Then click **Preview Graph**. The graph for that customer and year appears.



### To Work With Sample Queries

To work with sample queries in the Microsoft Access database, click the **Queries** tab and select the query you want to work with.

### To Work With Sample Reports

To work with sample reports in the Microsoft Access database, click the **Reports** tab and select the report you want to work with.

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# Microsoft Excel

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# B

This appendix walks you through creating a pivot table using the ODBC Kit and Microsoft Excel 97 and higher. If you require more information about Microsoft Excel, consult the Microsoft Excel User's Guide or Online Help.

Please note that the appendix uses Microsoft Excel 97 in the example illustrations. If you are using a more recent version of Excel, the commands and interface may differ slightly.

Before you can create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Excel and Microsoft Query.

The following Microsoft Excel examples are included in the ODBC Kit:

- GLACCT.XLS—GL Account Number Lookup.
- PIVOT.DOC—Instructions for setting up an Excel Pivot table.
- SOORDERS.XLS—Sales Orders Pivot Table Lookup.
- ARCUST.XLS—Customer History Lookup and Graphs.

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**Note**

This appendix includes instructions for using Microsoft Query with Microsoft Excel. If necessary, install Microsoft Query from the Microsoft Office media. You may also need to create a shortcut to Query manually.

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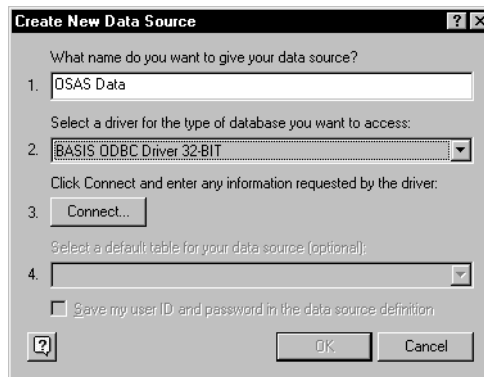
You can find additional information about using ODBC with Microsoft Excel on the Open Systems Web page on the Internet at <http://www.osas.com>.

## Building a Query For a Pivot Table

1. Start Microsoft Query.
2. From the **File** menu, select **New**. The Choose Data Source screen appears.

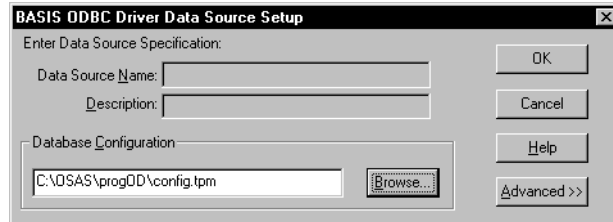


3. Select **<New Data Source>** and click **OK**. The Create New Data Source screen appears.



4. Enter a name you want to give the data source in box **1**. You can use the same source again.
5. Select the **BASIS ODBC Driver** in box **2**.

- Click **Connect**. The BASIS ODBC Driver Data Source Setup box appears.



- Enter the file path and name of the CONFIG.TPM file you set up from within the OSAS ODBC software in the **Database Configuration** field, or click **Browse** to navigate to the file.

If you already built the shadow dictionary, click the **Advanced** button, and select the **No Shadow Dictionary Consistency Check** and **Fast Connect** check boxes to improve performance. See the online help for additional information about advanced options.

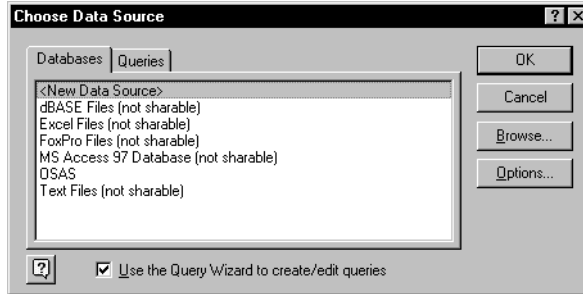
**Note**

If you are using OSAS<sup>CS</sup> and you use the data server to access your data, enter your login name in the **Network User ID** field.

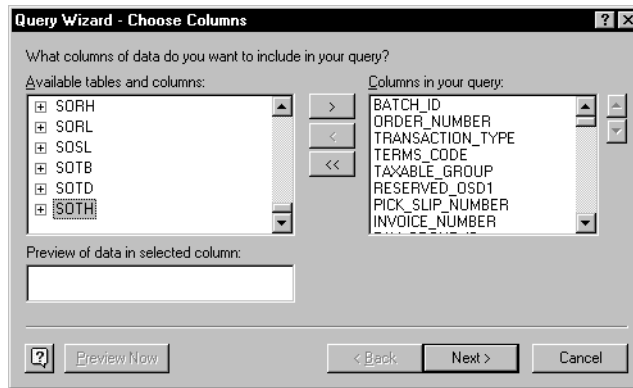
- Click **OK** to connect to the data source. You are returned to the Create New Data Source screen.
- Select a table in box **4** if you want to select a default table source; otherwise, leave the box blank and select any table when you develop the query.

If you select a table, the list of tables always starts at that table. Otherwise the list of tables starts at the beginning of the list.

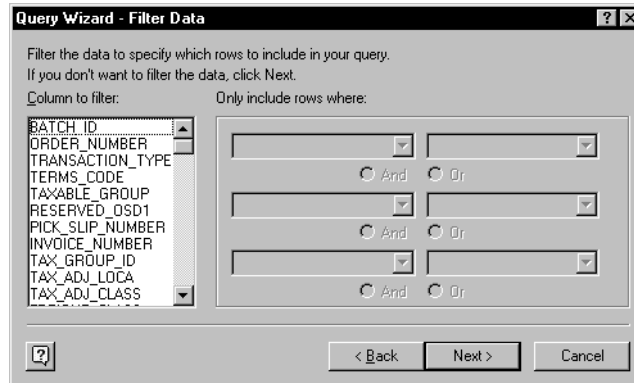
- When the Choose Data Source box appears, select the data source you set up in the previous steps.



- When the Choose Columns screen appears, select a table you want to use in your Excel spreadsheet. For this example, start with one table and add a second table later. Select the **SOTH** table, select the columns for the spreadsheet, and click **Next**.

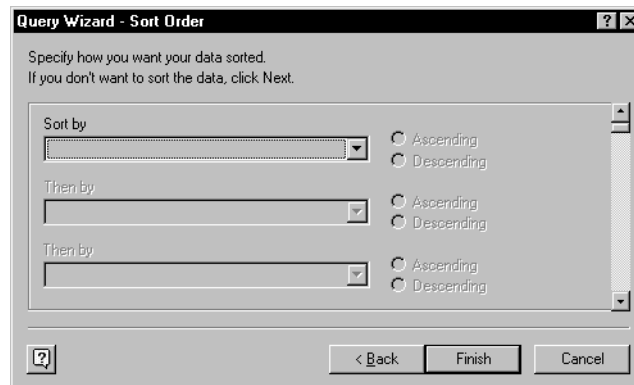


- The Filter Data dialog box appears. Use it to select specific records from the table. In most cases, you do not need to choose anything in this dialog box.



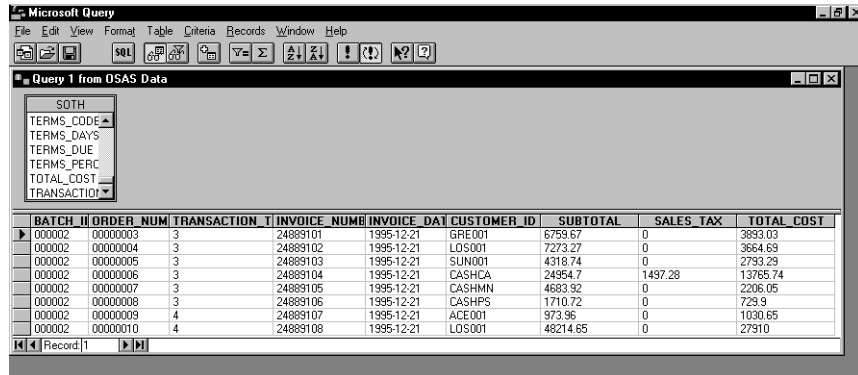
For example, to filter out credit memos, select the field named TRANSACTION\_TYPE, select **does not equal**, and then enter **4** for a value. (TRANSACTION\_TYPE 4 is a credit memo.)

- Click **Next**. The Sort Order box appears.



Use it to select how the data is sorted in a query. For example, select a field in the **Sort by** field and check **Ascending** or **Descending** for the sort order. Select subsequent fields and sort orders for hierarchical sorts. For now, do not enter any sort fields.

14. Click **Finish**. You are returned to the Microsoft Query screen and the data in your query appears.



To delete a column, select a column and press the **Delete** key. You can also add a column by double-clicking on the field name in the **SOTH** box.

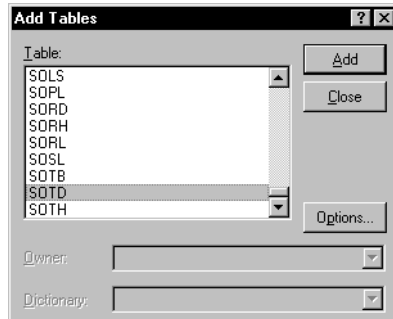
**Note**

You can also select which fields you want in your query in the Choose Columns screen as shown in step 11 on page B-4. Instead of selecting the entire table, you can click the **+** box next to the table you want and select the given fields from the list.

15. Select the following fields:

- BATCH\_ID
- ORDER\_NUMBER
- TRANSACTION\_TYPE
- INVOICE\_NUMBER
- INVOICE\_DATE
- CUSTOMER\_ID
- SUBTOTAL
- SALES\_TAX
- TOTAL\_COST

- From the **Table** menu, choose **Add tables**. The Add Table dialog box appears.

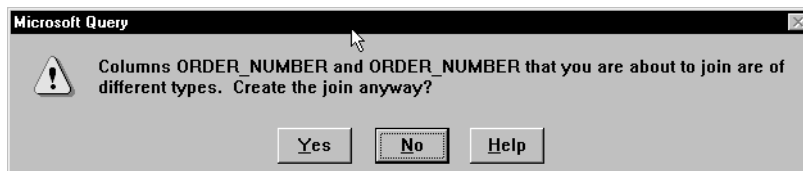


- A list of all the tables appears. Select the **SOTD** table, and click **Close**.

## Joining Fields

- Locate **BATCH\_ID** in the **SOTD** and **SOTH** tables. Click the **BATCH\_ID** entry in the **SOTH** table and hold the left mouse button down.
- Drag the field over to the **BATCH\_ID** field in the **SOTD** table and release the mouse button. A line appears between the two **BATCH\_ID** fields, joining the two fields.
- Follow steps 18 through 19 with the **ORDER\_NUMBER** field.

A message similar to the one shown below may appear. For now, click **Yes** to ignore the message and join the fields together.



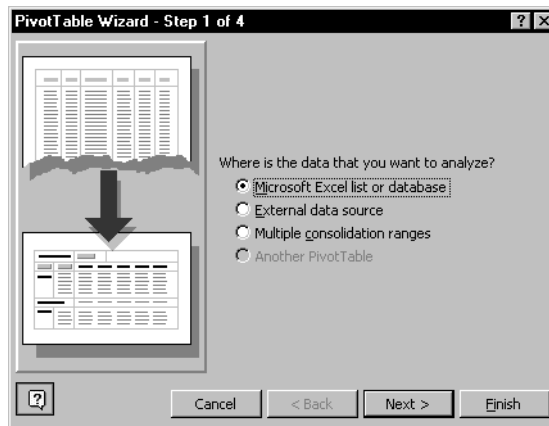
21. Select the following fields from the **SOTD** table:

- ENTRY\_NUMBER
- UNIT\_COST\_COMPNT
- UNIT\_PRICE
- ORDERED\_QTY
- SHIPPED\_QTY\_SELL
- BACKORDERED\_QTY.

22. To save the query, select **Save** from the **File** menu.

## Using the Query in Microsoft Excel

1. Start Excel and open a new worksheet.
2. From the **Data** menu, select **Pivot Table Report**. The Pivot Table Wizard appears.



3. Step 1 of the wizard lists the options from which you can choose the data source to use in your Pivot Table. Select **External Data Source** and click **Next**.

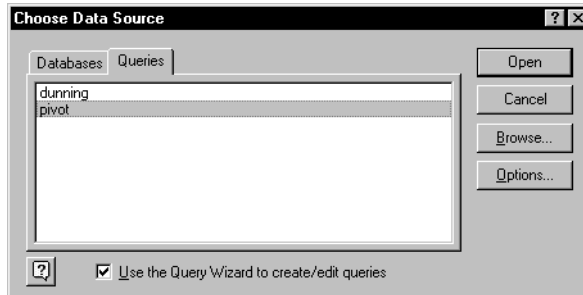
- When step 2 of the wizard appears, click **Get Data**.



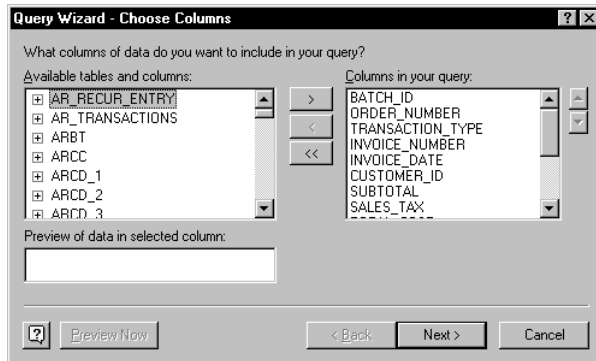
The Choose Data Source box from Microsoft Query appears.



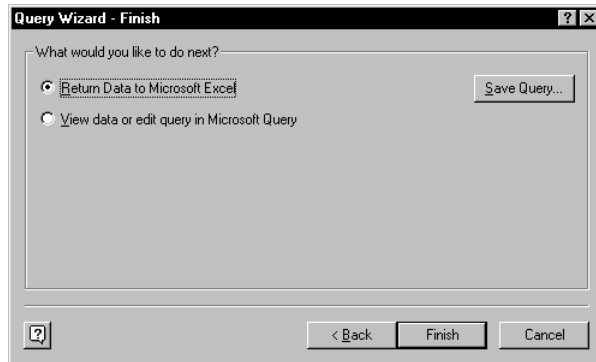
- Click the **Queries** tab and select the query you saved in Microsoft Query.



The Choose Columns dialog box under Query appears.



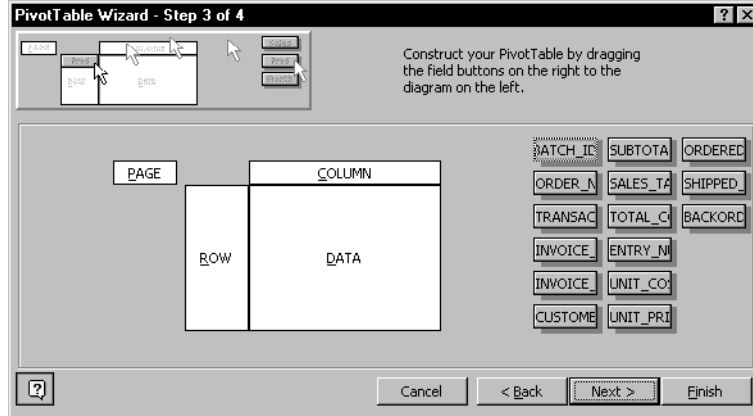
6. Click **Next**. The query columns appear.
7. Click **Next** to pass by the **Filter Data** and **Sort Order** options. The Query Wizard - Finish dialog box appears.



8. Select **Return Data to Microsoft Excel** and click **Finish**. You are returned to the Pivot Table Wizard Step 2 of 4 dialog box.



9. Click **Next**. The Pivot Table Wizard - Step 3 of 4 dialog box appears.

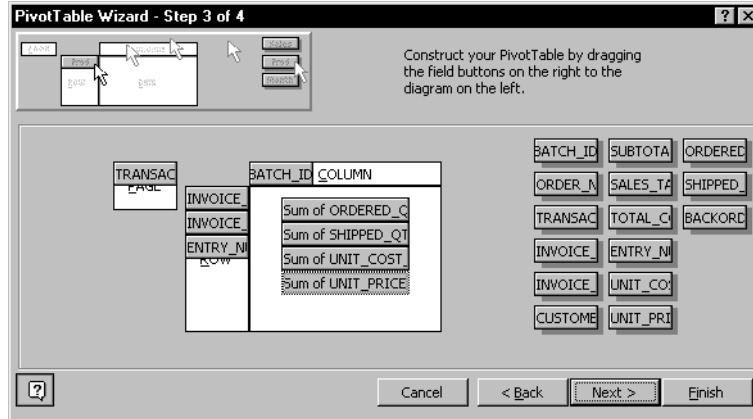


The selected fields and four areas—**Page**, **Row**, **Column**, and **Data**—in which you can put fields appear. Drag and drop the fields to use in this report into the respective areas. (To view the full field name, hold the cursor on the button, and a tool tip appears listing the full field name.)

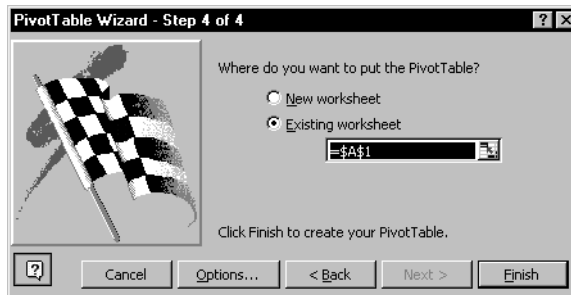
10. Drag and drop the following fields:

- **TRANSACTION\_TYPE** into **PAGE**
- **INVOICE\_NUMBER**, **INVOICE\_DATE**, and **ENTRY\_NUM** into **ROW**
- **BATCH\_ID** into **COLUMN**
- **ORDERED\_QTY**, **SHIPPED\_QTY\_SELL**, **UNIT\_COST\_COMPNT** and **UNIT\_PRICE** into **DATA**.

The fields appear on the screen. Numeric fields dropped into the **Data** section become summary fields.



11. Click **Next**. The Pivot Table Wizard - Step 4 of 4 dialog box appears. This final step lets you create the pivot table either in a new worksheet or in the existing worksheet. Accept the given options and click **Finish**.



The pivot table appears.

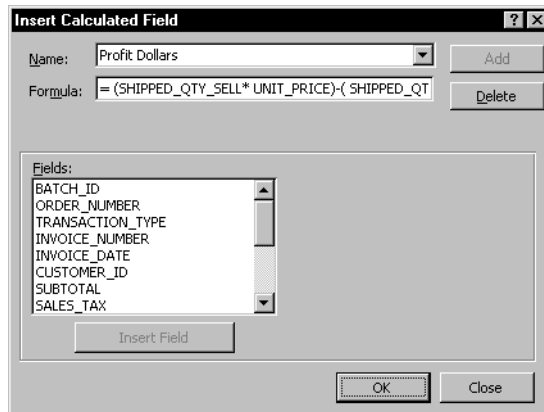
INVOICE	INVOICE	ENTRY N	Data	BATCH ID	Grand Total
24889101	12/21/95	001	Sum of ORDERED_QTY	4	4
			Sum of SHIPPED_QTY_SELL	4	4
			Sum of UNIT_COST_COMPNT	343.55	343.55
			Sum of UNIT_PRICE	475.686	475.686
		002	Sum of ORDERED_QTY	1	1
			Sum of SHIPPED_QTY_SELL	1	1
			Sum of UNIT_COST_COMPNT	907.53	907.53
			Sum of UNIT_PRICE	1317.384	1317.384
		003	Sum of ORDERED_QTY	7	7
			Sum of SHIPPED_QTY_SELL	7	7
			Sum of UNIT_COST_COMPNT	22.01	22.01
			Sum of UNIT_PRICE	20.7995	20.7995
		004	Sum of ORDERED_QTY	5	5
			Sum of SHIPPED_QTY_SELL	5	5
			Sum of UNIT_COST_COMPNT	226.99	226.99
			Sum of UNIT_PRICE	526.131	526.131
		005	Sum of ORDERED_QTY	2	2
			Sum of SHIPPED_QTY_SELL	2	2
			Sum of UNIT_COST_COMPNT	161.14	161.14

Highlight rows and columns to shift them around. To view only invoices, change the **Transaction Type** value from **All** to **3**. Change it to **4** and credit memos appear. Totals per type are also listed.

## Adding a Calculated Field

You can also add new fields, like profit, to the data area. To add profit to the data area, follow these steps:

1. Highlight the last row in your data area, Sum of UNIT\_PRICE, right-click, and select **Insert** from the menu that appears. The Insert Calculated Field dialog box appears.



2. Enter the following information about the inserted field:

- Enter **Profit Dollars** in the **Name** field.
- Enter the following (on one line) in the **Formula** field:

**=(SHIPPED\_QTY\_SELL\* UNIT\_PRICE) - ( SHIPPED\_QTY\_SELL\* UNIT\_COST\_COMPNT)**

See the illustration above for an example of the completed calculated field.

3. Click **Add**, then click **OK**.

The pivot table appears with the **Sum of Profit Dollars** field.

The screenshot shows a Microsoft Excel window titled 'Microsoft Excel - Book1'. The pivot table is displayed in the following structure:

INVOICE	INVOICE	ENTRY N	Data	BATCH ID	Grand Total
24889107	12/21/95	001	Sum of ORDERED_QTY	000002	3
			Sum of SHIPPED_QTY_SELL		3
			Sum of UNIT_COST_COMPNT	343.55	343.55
			Sum of UNIT_PRICE	324.6548	324.6548
			Sum of Profit Dollars	-56.6856	-56.6856
	12/21/95		Sum of ORDERED_QTY		3
	12/21/95		Sum of SHIPPED_QTY_SELL		3
	12/21/95		Sum of UNIT_COST_COMPNT	343.55	343.55
	12/21/95		Sum of UNIT_PRICE	324.6548	324.6548
	12/21/95		Sum of Profit Dollars	-56.6856	-56.6856
24889107			Sum of ORDERED_QTY		3
24889107			Sum of SHIPPED_QTY_SELL		3
24889107			Sum of UNIT_COST_COMPNT	343.55	343.55
24889107			Sum of UNIT_PRICE	324.6548	324.6548
24889107			Sum of Profit Dollars	-56.6856	-56.6856
24889108	12/21/95	001	Sum of ORDERED_QTY		2
			Sum of SHIPPED_QTY_SELL		2

An arrow points to the 'Sum of Profit Dollars' field in the pivot table.

For more information about pivot tables, see the Microsoft Excel documentation or online help.



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# Microsoft Query

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# C

For information about using Microsoft Query 97 and higher with the ODBC kit, see Appendixes B and D. If you require more information about Microsoft Query, consult the Microsoft Query User's Guide or Online Help.

Before you use the ODBC Kit with Microsoft Query, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Query.



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# Microsoft Word

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# D

This appendix walks you through creating a dunning letter using the ODBC Kit, Microsoft Query 97 and higher, and Microsoft Word 97 and higher. If you require more information about Microsoft Word, consult the Microsoft Word User's Guide or Online Help.

Please note that the appendix uses Microsoft Word 97 in the example illustrations. If you are using a more recent version of Word, the commands and interface may differ slightly.

Before you create this form letter, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Microsoft Query and Microsoft Word.

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**Note**

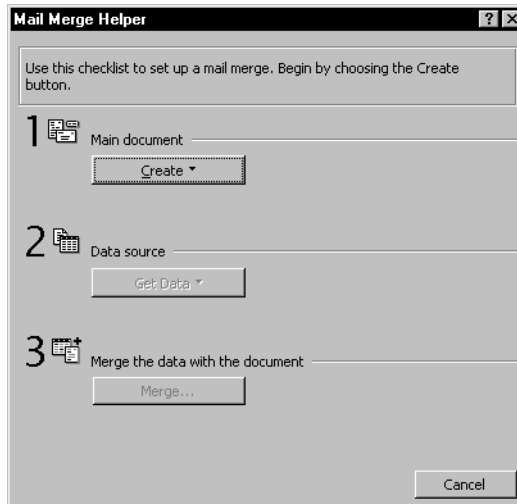
This appendix includes instructions for using Microsoft Query with Microsoft Word. If necessary, you can install Microsoft Query from the Microsoft Office media. You may also need to create a shortcut to Query manually.

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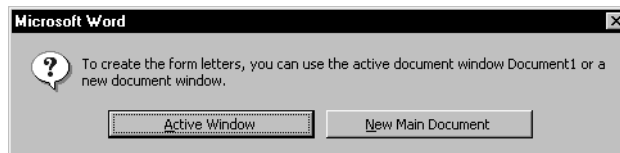
## Creating a Form Letter

To create a form letter, create a query for the form letter, and merge the letter and query, follow these steps:

1. Start Microsoft Word and select **Mail Merge** from the **Tools** menu. The Mail Merge Helper dialog box appears.

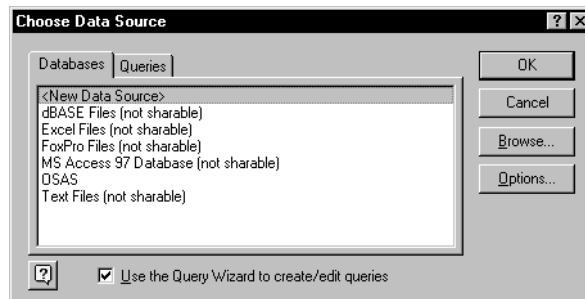


2. Select **Create**.
3. Select **Form Letter** from the **Create** options. A Microsoft Word message box appears.

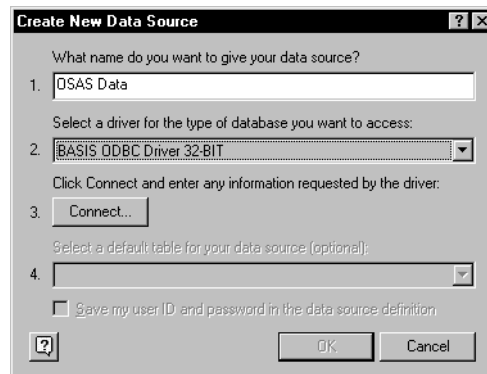


4. Select **Active Window**. You are returned to the Mail Merge Helper dialog box. The **Edit** button appears. Use it to edit or enter text in the document.

5. Select **Get Data** to connect to the OSAS data. If you have defined a query, select **Open Data Source** and select the query in the dialog box that appears. If you have not defined a query, select **Create Data Source**. The Choose Data Source screen appears.

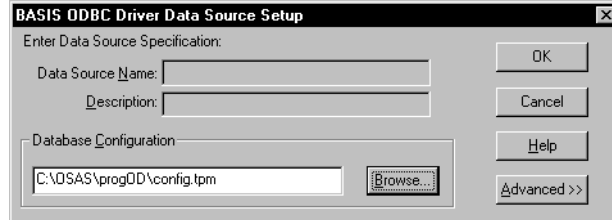


6. Select **<New Data Source>** and click **OK**. The Create New Data Source screen appears.



7. Enter a name you want to give the data source in box **1**. You can use the same source again.
8. Select the **BASIS ODBC Driver** in box **2**.

9. Click **Connect**. The BASIS ODBC Driver Data Source Setup box appears.



10. Enter the file path and name of the CONFIG.TPM file you set up using the **Edit CONFIG.TPM** function in the **Database Configuration** field, or click **Browse** to navigate to the file.

If you have already built the shadow dictionary, click the **Advanced** button, and select the **No Shadow Dictionary Consistency Check** and **Fast Connect** check boxes to improve performance. See the online help for additional information about advanced options.

---

**Note**

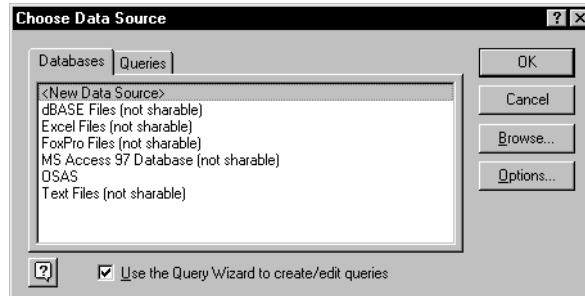
If you are using OSAS<sup>CS</sup> and you use the data server to access your data, enter your login name in the **Network User ID** field.

---

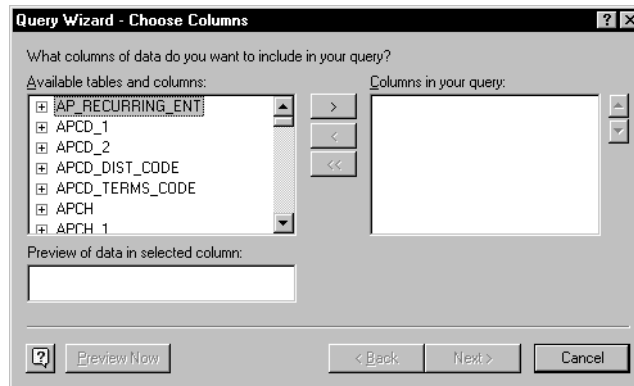
11. Click **OK** to connect to the data source. You are returned to the Create New Data Source screen.
12. Select a table in box **4** if you want to select a default table source. Otherwise, leave it blank and select any table when you develop the query.

If you select a table, the list always starts at that table; otherwise the list starts at the first table.

13. When the Choose Data Source box appears, select the data source you set up in the previous steps and click **OK**.



14. When the Choose Columns screen appears, select the tables you want to use in your Word form letter. For this example, select **ARCU**.

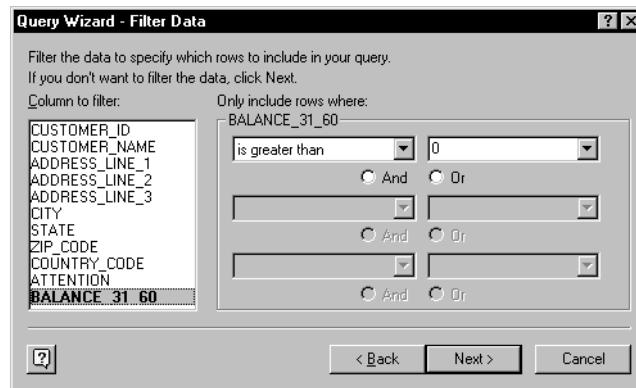


15. Select the following fields and click **Next**.

- CUSTOMER\_ID
- CUSTOMER\_NAME
- ADDRESS\_LINE\_1
- ADDRESS\_LINE\_2
- ADDRESS\_LINE\_3
- CITY
- STATE

- ZIP\_CODE
- ATTENTION
- BALANCE\_31\_60
- BALANCE\_61\_90
- BALANCE\_91\_120
- UNAPPLIED\_CREDIT

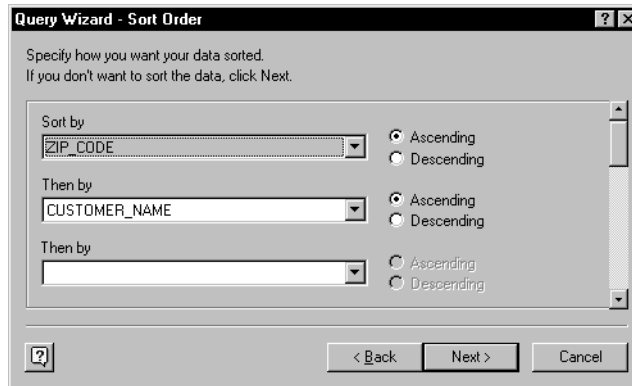
16. The Filter Data box appears. Use the Filter Data dialog box to select specific records from the table.



Select the **BALANCE\_31\_60** field, select **is greater than**, and select **0**. This query will return only those customers whose **BALANCE\_31\_60** field is greater than 0.

17. Click **Next**.

18. When the Sort Order box appears, select **ZIP\_CODE** in the **Sort by** field, and select **Ascending** as the sort order. Select **CUSTOMER\_NAME** in the first **Then by** field, and select **Ascending** as the sort order..

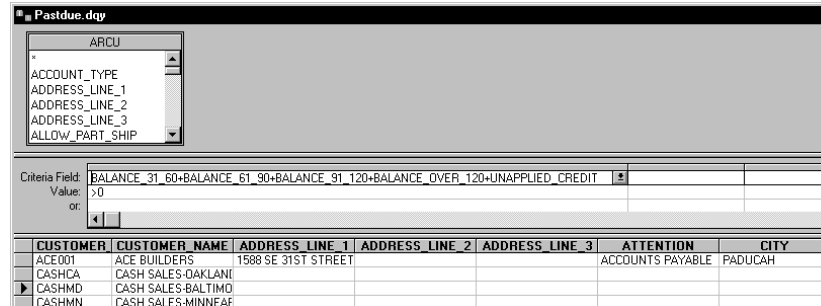


The results of the query will sort first by the customer’s zip code and then by the customer’s name.

19. Click **Next**. The Query Wizard - Finish dialog box appears. Select **View data or edit query** in Microsoft Query, and click **Finish**



You are returned to Microsoft Query.

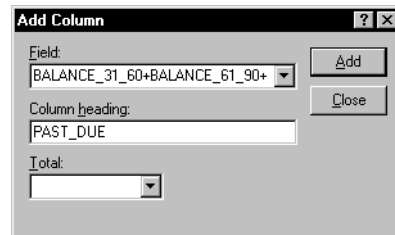


20. Enter the following in the **Criteria Field**:

**BALANCE\_31\_60+BALANCE\_61\_90+BALANCE\_91\_120+BALANCE\_OVER\_120+UNAPPLIED\_CREDIT**

21. Select the entry in the **Criteria Field** and copy it to the clipboard (Ctrl+C).

22. Select **Add Column** from the **Records** menu. The Add Column dialog box appears.

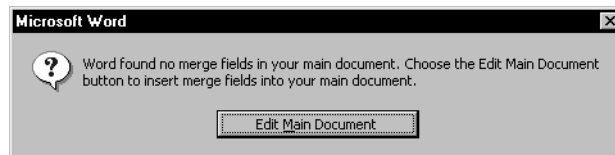


23. Paste the contents you copied to the clipboard into the **Field** list box. Enter **PAST\_DUE** in the **Column heading** text box. Click **Add**, then click **Close**.

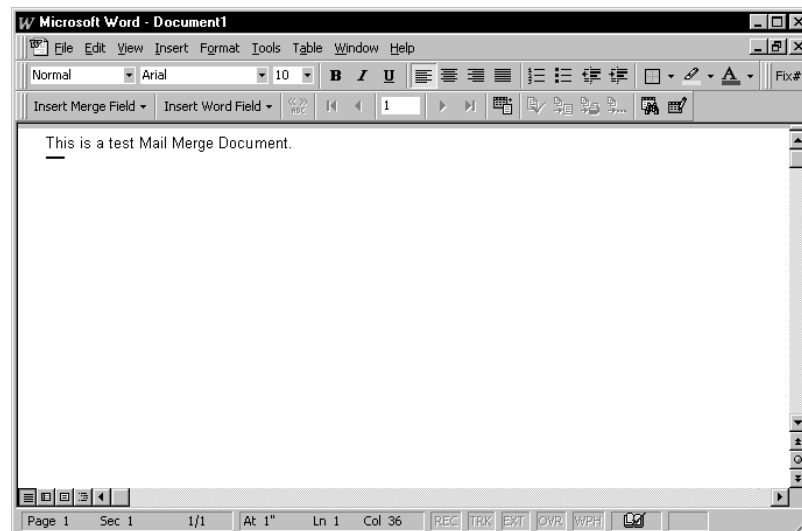
You are returned to Microsoft Query. The PAST\_DUE column is added to the query.

24. Select **Save** from the **File** menu to save the query.

25. Select **Return Data to Microsoft Word** from the **File** menu. You are returned to Microsoft Word. If you have no merge fields defined in the document, a Microsoft Word message box appears.

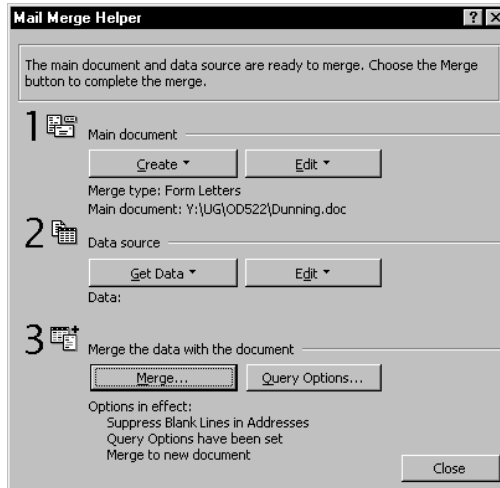


26. Click **Edit Main Document**. The Mail Merge Helper dialog box closes and you are returned to the document.



27. Click the **Insert Merge Field** button to insert the fields (such as **CUSTOMER\_NAME**) from the query into the form letter. Click the **Insert Word Field** button to insert Word fields (such as the current date) into the form letter. When you are finished with the letter, select **Mail Merge** from the **Tools** menu.

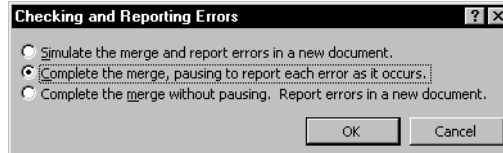
28. When the Mail Merge Helper dialog box appears, click **Merge** to create the form letter.



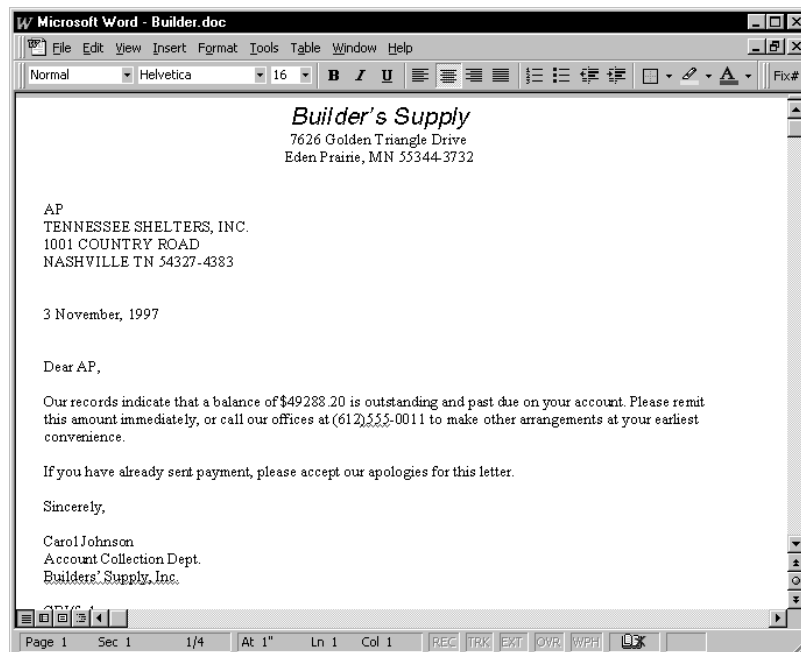
29. When the Merge dialog box appears, select the merge options: **New document**, **Printer**, or **Electronic mail**. Click **Check Errors** if you want to proof the interaction between Microsoft Word and the query. Otherwise, click **Merge** to produce the letters.



30. If you clicked **Check Errors**, the Checking and Reporting Errors dialog box appears.



31. Select the option you want to use during the merge and click **OK**.
32. You are returned to Microsoft Word.



**Note**

The form letter does not format decimal numbers that end in 0 correctly. For example, \$49288.20 is produced as \$49288.2.

## Sample Word Form Letter

Builder's Supply  
7626 Golden Triangle Drive  
Eden Prairie, MN 55344-3732

{MERGEFIELD ATTENTION}  
{MERGEFIELD CUSTOMER\_NAME}  
{MERGEFIELD ADDRESS\_LINE\_1}  
{MERGEFIELD ADDRESS\_LINE\_2}  
{MERGEFIELD ADDRESS\_LINE\_3}  
{MERGEFIELD CITY}{MERGEFIELD STATE}{MERGEFIELD ZIP\_CODE}  
{time \@ "D mmmm, yyyy"}

Dear {MERGEFIELD ATTENTION},  
Our records indicate that a balance of \${MERGEFIELD PAST\_DUE} is outstanding and past due on your account. Please remit this amount immediately, or call our offices at (612) 555-0011 to make other arrangements at your earliest convenience.

If you have already sent payment, please accept our apologies for this letter.

Sincerely,

Carol Johnson  
Account Collection Dept.  
Builders' Supply, Inc.

CRJ/fsd

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# Crystal Reports

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# E

This appendix walks you through creating a simple report using the ODBC Kit and Crystal Reports for Windows. If you require more information about Crystal Reports, consult the Crystal Reports User's Guide or Online Help.

Before you create this report, complete these tasks:

- Install and set up the ODBC Kit.
- Install and set up the BASIS ODBC drivers.
- Install Seagate Crystal Reports for Windows.

The following Crystal Reports examples are included:

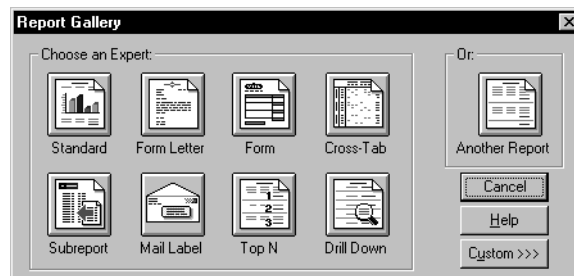
- ARLABEL.RPT—Customer Labels
- CRYSTAL.DOC—Instructions for setting up the customer list in Crystal Reports
- ARCUST1.RPT— Customer List
- ARCUST2.RPT—Customer List with Graph
- BRRECON.RPT—Bank Reconciliation Reconciliation Report

You can find additional information about using ODBC with Crystal Reports on the Open Systems Web page on the Internet at <http://www.osas.com>.

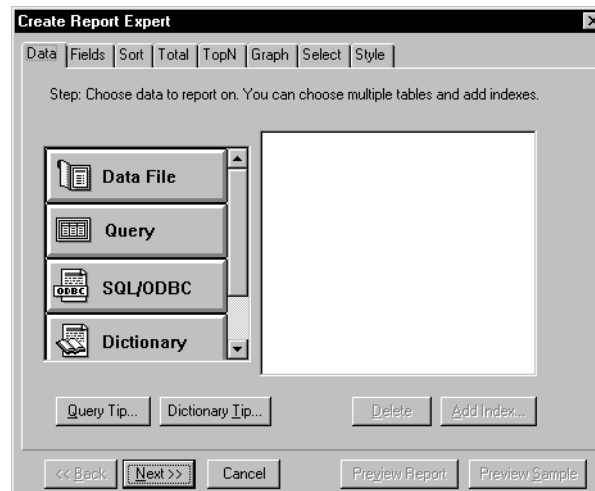
## Crystal Reports Customer List

To create a customer list using Crystal Reports for Windows, follow these steps:

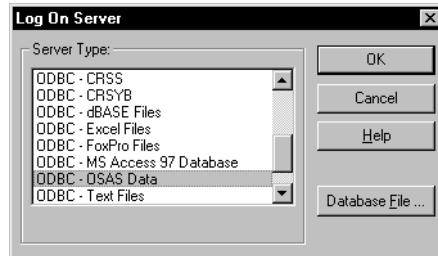
1. Start Crystal Reports and select **New** from the **File** menu. The Report Gallery screen appears.



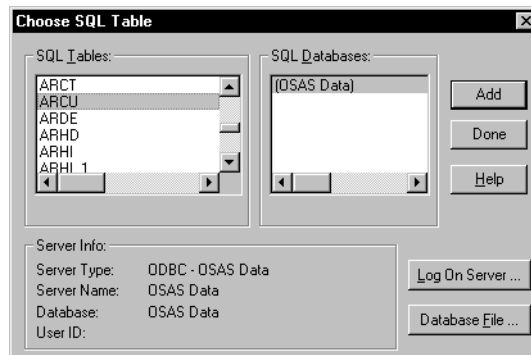
2. Click the **Standard** report format. The Create Report Expert screen appears.



3. Select **SQL/ODBC** as your source on the **Data** tab. The **Log On Server** dialog box appears.

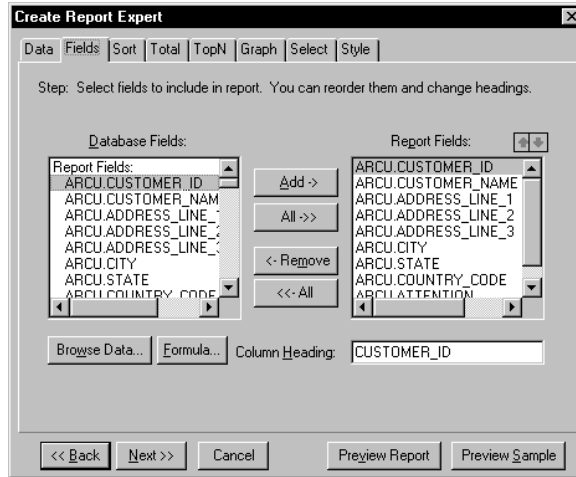


4. Select the data source you set up for OSAS ODBC data under the Windows ODBC Administrator. The Choose SQL Table dialog box appears.



5. Select the **ARCU** file, click **Add**, and then click **Done**. You are returned to the Create Report Expert screen.

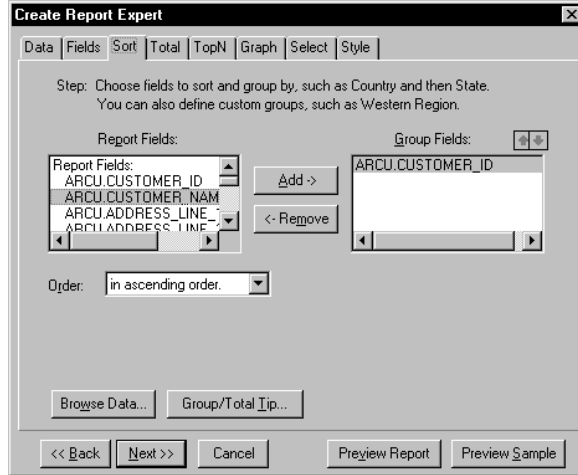
- Click the **Fields** tab or click **Next**. The Fields tab appears.



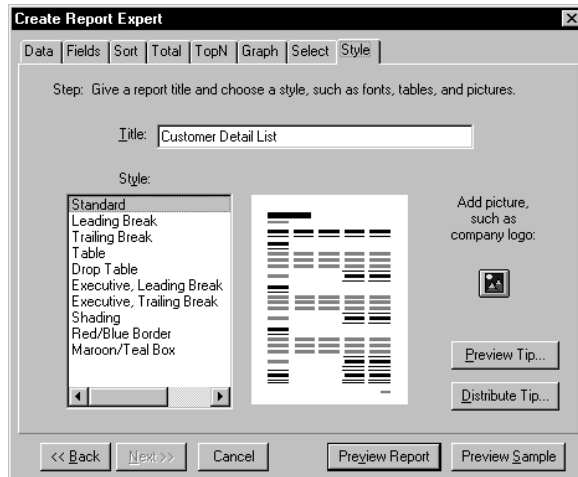
- Select the following fields for the report:

- CUSTOMER\_ID
- CUSTOMER\_NAME
- ADDRESS\_LINE\_1
- ADDRESS\_LINE\_2
- ADDRESS\_LINE\_3
- CITY
- STATE
- COUNTRY\_CODE
- ATTENTION

8. Click the **Sort** tab or click **Next**. The Sort tab appears.

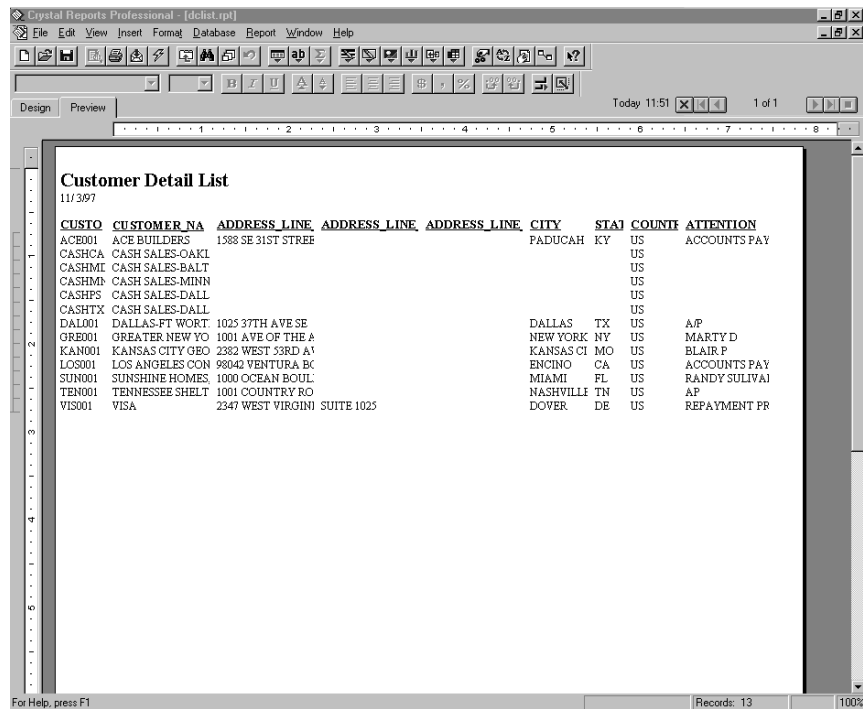


9. Select **CUSTOMER\_ID** to sort the report by.
10. Click the **Style** tab. The Style tab appears.



11. Enter **Customer Detail List** for the title.

12. Select **Standard** for the report style.
13. Select **Preview Report**. The report appears.



The example report included with the OSAS ODBC package resembles the AR Customer Detail List. You can move the fields by dragging and dropping them. (Column titles on the sample report have been deleted.)

To insert text fields on the report, follow these steps:

1. Select **Text Object** from the **Insert** menu to add text fields.
2. Move the cursor to where you want to add text to the report.
3. Type in the text.

---

# Common Questions

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## F

These are commonly asked questions about the ODBC Kit.

**It takes a long time to build the shadow dictionary, and it does it every time I connect to the ODBC Driver.**

If you do not select the **Fast Connect** and **No Shadow Dictionary Consistency Check** check box options in the Advanced Settings on the ODBC data source, the shadow dictionary will be rebuilt every time you start an ODBC connection. Changing these option settings will speed up data connections and prevent the ODBC driver from rebuilding the shadow dictionaries when you start the driver.

**I get a message that the user count is exceeded.**

Wait a few seconds for memory to cache out the last activation of the ODBC Driver. The message usually appears if you try to access a second data source soon after you finished using the same connection with a different source.

**What is DDBUILDER?**

DDBUILDER is the BASIS tool used to create the data dictionary. You can use the DDBUILDER or the OSAS functions on the Dictionary Tools menu to create the data dictionaries needed to work with ODBC.



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# Registration and Delivery

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# G

If your computer cannot be connected to the Internet, BASIS supplies you with other methods of receiving the license registration information. In step 15 of the installation process (see page 2-11), you are presented with several alternative choices. Follow the instructions below to register your license using one of these alternatives:

E-mail	page G-2
Telephone	page G-5
Fax	page G-11
Other	page G-18

## E-mail

**Note**

To receive the license information via e-mail, you first need an e-mail account.

---

1. In the Registration Method box, select the **Email To** option.

The screenshot shows a dialog box titled "License Registration and Delivery Methods". It is divided into two main sections: "Registration Method" and "License Delivery Method".

**Registration Method:** The question is "How do you want to send your license information to BASIS?". The options are:

- Web Browser
- Email To: license@basis.com
- Telephone
- Fax
- Other

**License Delivery Method:** The question is "How do you want BASIS to deliver your permanent license?". The options are:

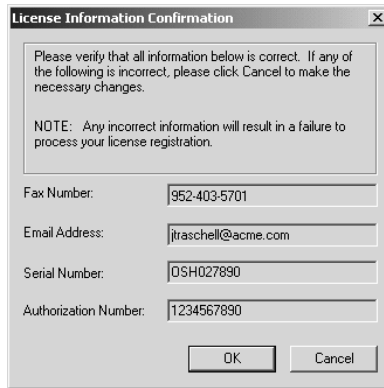
- Web Browser
- Email Address: jtraschell@acme.com
- Fax Number: [Empty text box]
- Country: [Dropdown menu]

Below the "Fax Number" option, it says "Include your area or country code in the fax number".

At the bottom of the dialog box, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

2. Select the **Email Address** option and enter the e-mail address at which you want to receive the license file information.
3. Click **Next**.

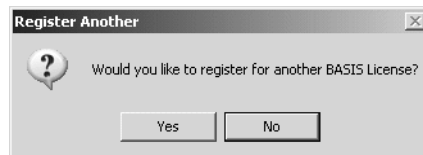
4. The License Information Confirmation screen appears. Confirm the information listed and, if it is correct, click **OK**. If there is an error, click **Cancel** and reenter the information.



5. The Success box appears when the e-mail has been sent to BASIS. Click **OK** to continue.



6. If you want to install another license, click **Yes**. The License and Registration box (see step one) appears. If not, click **No** and the Registration Notification screen (see step seven) appears.



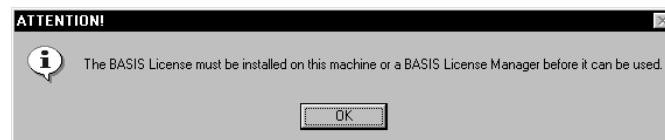
## Registration and Delivery

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7. Follow the instructions on the screen and click **Next**.



8. If you have not installed the license, click **Next**. The installation process begins with the Install A BASIS License screen shown on page 2-13. If you do not want to install the license, click **Cancel** and the Attention screen (below) appears and the installation process ends.



---

## Telephone

1. In the Registration Method box, select the **Telephone** option.

The screenshot shows a dialog box titled "License Registration and Delivery Methods". It is divided into two main sections: "Registration Method" and "License Delivery Method".

**Registration Method:** The question is "How do you want to send your license information to BASIS?". The options are:

- Web Browser
- Email To:
- Telephone
- Fax
- Other

**License Delivery Method:** The question is "How do you want BASIS to deliver your permanent license?". The options are:

- Web Browser
- Email Address:
- Fax Number:
- Country:  (dropdown menu)

Below the "Fax Number" field, there is a note: "Include your area or country code in the fax number".

At the bottom of the dialog box, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

2. Select the **Fax Number** option and enter the fax number at which you want to receive the license file information. In the **Country** list box, select the appropriate country and click **Next**.

## Registration and Delivery

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- The Telephone License Request screen appears. Confirm the information listed, and if it is correct, click **OK**. If the information is incorrect, click **Cancel** and reenter the information.



**Telephone License Request**

You have selected to register your product using the BASIS Telephone License Request System.

Inside the United States: 1 505 338 4171  
Outside the United States: +1 505 338 4171

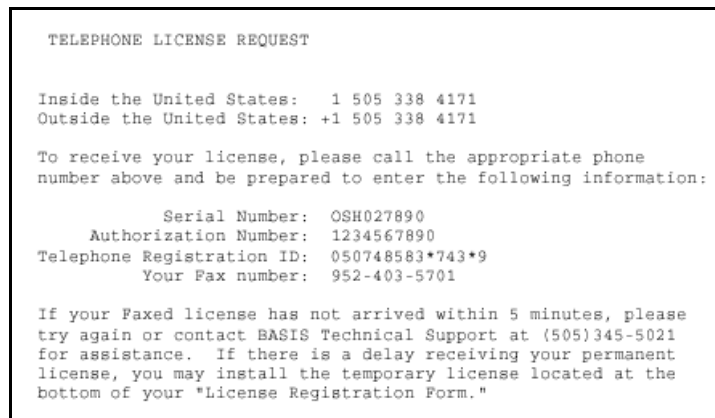
To receive your license, please call the appropriate phone number above and be prepared to enter the following information:

Serial Number: OSH027890  
Authorization Number: 1234567890  
Telephone Registration ID: 050748583\*743\*9  
Your fax number: 952-403-5701

If your Faxed license has not arrived within 5 minutes, please try again or contact BASIS Technical support at (505)345-5021 for assistance.

- When the Print dialog box appears, select the printer to use and click **OK** to print the information you need to give to BASIS for your license.

Below is an example of the document that prints:



```
TELEPHONE LICENSE REQUEST

Inside the United States:  1 505 338 4171
Outside the United States: +1 505 338 4171

To receive your license, please call the appropriate phone
number above and be prepared to enter the following information:

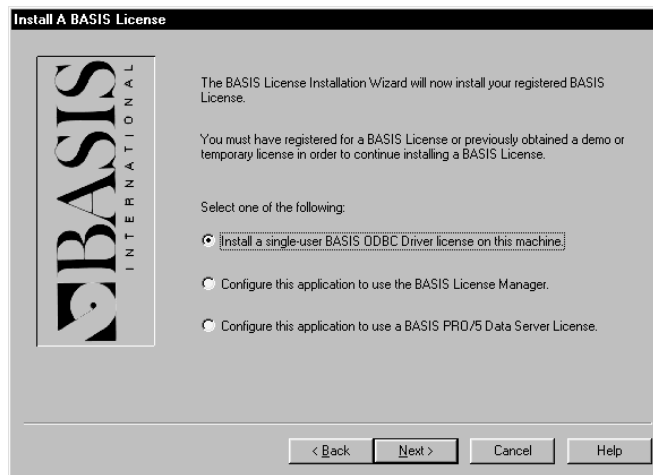
    Serial Number:  OSH027890
    Authorization Number:  1234567890
    Telephone Registration ID: 050748583*743*9
    Your Fax number:  952-403-5701

If your Faxed license has not arrived within 5 minutes, please
try again or contact BASIS Technical Support at (505)345-5021
for assistance.  If there is a delay receiving your permanent
license, you may install the temporary license located at the
bottom of your "License Registration Form."
```

5. To complete the installation of your driver, call the phone number on the printout. Follow the voice recording's instructions to specify the information on the printout, and follow the instructions to register your license.

Once you receive the information, follow these instruction:

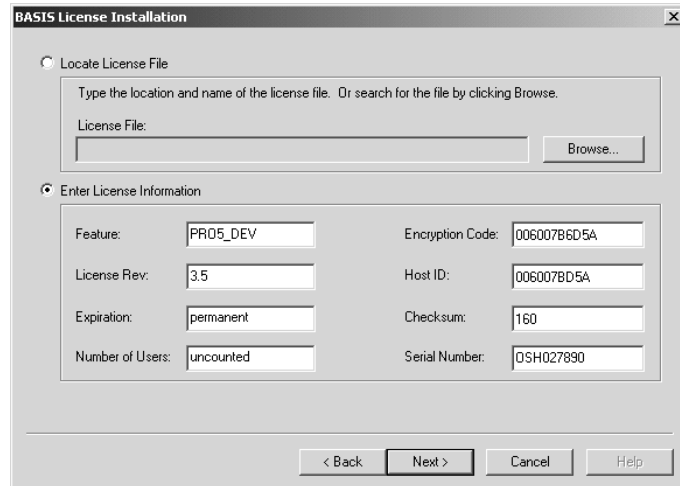
1. On your Windows desktop, click **Start**, point to **Programs**, then to **BASIS ODBC Driver 3.01**, and then click **Install a BASIS License**. The Install A BASIS License screen appears. Click **Next**.



## Registration and Delivery

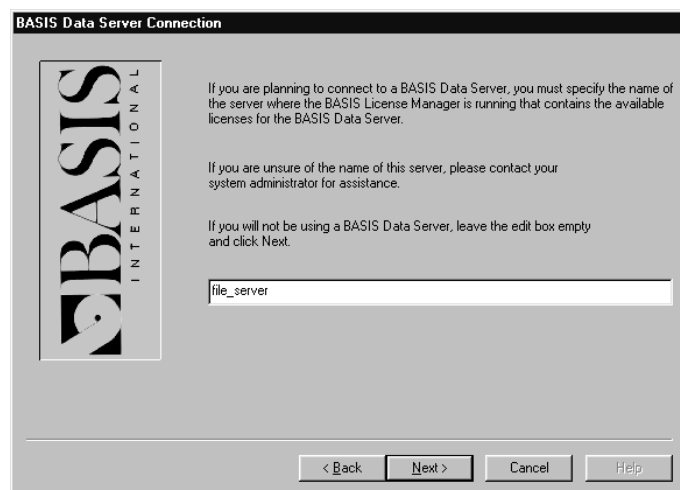
---

2. Select the **Enter License Information** option and enter the information received from BASIS into the appropriate fields. Click **Next**.



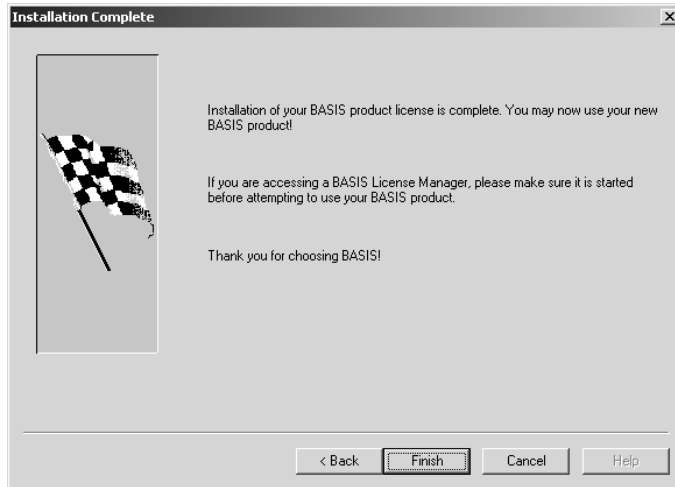
The image shows a dialog box titled "BASIS License Installation". It has two radio button options: "Locate License File" (which is unselected) and "Enter License Information" (which is selected). Under "Locate License File", there is a text box for "License File:" and a "Browse..." button. Under "Enter License Information", there are several text boxes for: "Feature:" (containing "PRO5\_DEV"), "Encryption Code:" (containing "006007B8D5A"), "License Rev:" (containing "3.5"), "Host ID:" (containing "006007BD5A"), "Expiration:" (containing "permanent"), "Checksum:" (containing "160"), "Number of Users:" (containing "uncounted"), and "Serial Number:" (containing "0SH027890"). At the bottom of the dialog are four buttons: "< Back", "Next >", "Cancel", and "Help".

3. If you use OSAS<sup>CS</sup> for Windows or UNIX/Linux, enter the name of the server that is running the Data Server. If you are using standard OSAS or OSAS<sup>CS</sup> for Novell, leave the field blank. In either case, click **Next**.

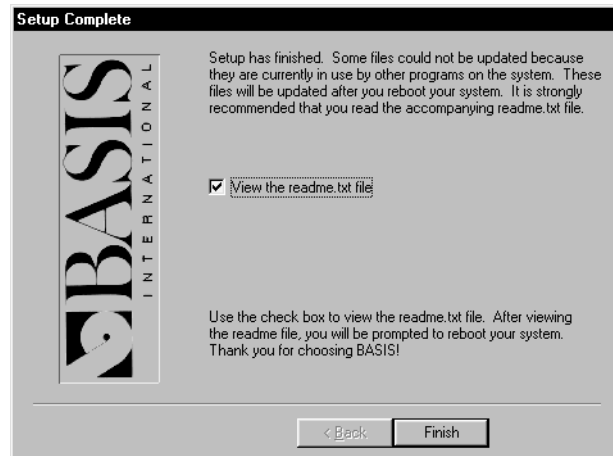


The image shows a dialog box titled "BASIS Data Server Connection". On the left side, there is a vertical logo for "BASIS INTERNATIONAL". The main text area contains three paragraphs of instructions: "If you are planning to connect to a BASIS Data Server, you must specify the name of the server where the BASIS License Manager is running that contains the available licenses for the BASIS Data Server.", "If you are unsure of the name of this server, please contact your system administrator for assistance.", and "If you will not be using a BASIS Data Server, leave the edit box empty and click Next." Below the text is a text box containing the placeholder text "file\_server". At the bottom of the dialog are four buttons: "< Back", "Next >", "Cancel", and "Help".

4. Click **Finish**.



5. If you do not want to view the readme.txt file, clear the check box. Otherwise, click **Finish**.



6. The Setup Complete screen appears. If you do not want to restart your computer, select the **No** option. If you do want to restart your computer now, first be certain that all other programs are closed. Then click **Finish** to activate your ODBC driver.



7. Before you use the ODBC driver you must:
  - Install the ODBC Kit from your OSAS media.
  - Create the config.tmp file (see page 3-3).
8. Once you complete these two steps, you can follow the Installing ODBC Drivers instructions page 2-19.

## Fax

1. In the Registration Methods box, select the **Fax** option.

The screenshot shows a dialog box titled "License Registration and Delivery Methods". It is divided into two main sections: "Registration Method" and "License Delivery Method".

**Registration Method:** The question is "How do you want to send your license information to BASIS?". The options are:

- Web Browser
- Email To:
- Telephone
- Fax
- Other

**License Delivery Method:** The question is "How do you want BASIS to deliver your permanent license?". The options are:

- Web Browser
- Email Address:
- Fax Number:
- Country:  (dropdown menu)

Below the "Country" field, there is a note: "Include your area or country code in the fax number".

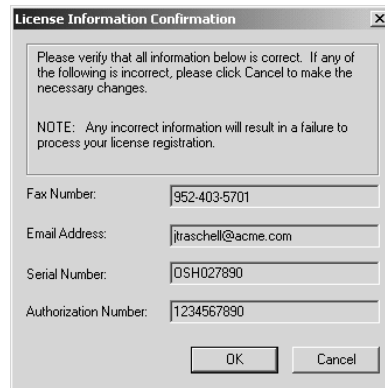
At the bottom of the dialog box, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

2. Select the **Fax Number** option and enter the fax number at which you want to receive the license file information. In the **Country** list box, select the appropriate country and click **Next**.

## Registration and Delivery

---

3. The License Information Confirmation screen appears. Confirm the information listed, and if it is correct, click **OK**. If the information is incorrect, click **Cancel** and reenter the information.



The dialog box titled "License Information Confirmation" contains the following text and fields:

Please verify that all information below is correct. If any of the following is incorrect, please click Cancel to make the necessary changes.

NOTE: Any incorrect information will result in a failure to process your license registration.

Fax Number:

Email Address:

Serial Number:

Authorization Number:

Buttons:

4. In the Emergency Contact Information screen, enter a contact name and phone number in case your fax cannot be sent. Click **OK**.



The dialog box titled "Emergency Contact Information" contains the following text and fields:

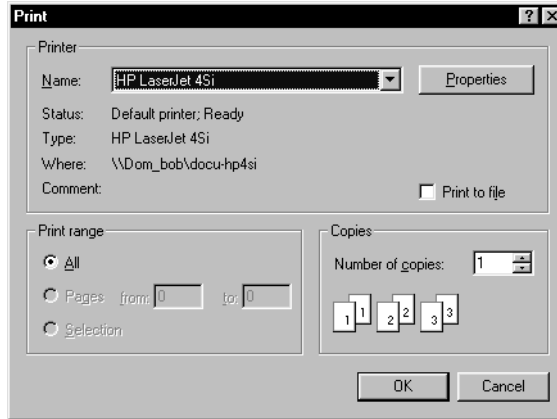
Please enter a name and phone number to expedite the delivery of a permanent license file in the unlikely event that problems are encountered during the license registration process.

Name:

Phone:

Buttons:

- The Print screen appears (below is an example). Click **OK** to print the information you need to fax to BASIS for your license.



```

#####
# Please fax this license form to BASIS
# International Ltd. at +1 505 338 4178
# to receive your permanent license file.
#####
Company:
Last Name:
First Name: Lisa Johnson
Phone Number: 952-403-5700
Fax Number: 952-496-2495
Email Address: lisa@builders_supply.com
Host Name: lisa
Host ID: 00E09805B732
Serial Number: OSH000001
License Auth Num: 1234567890
License Delivery: fax EN
Binary Fax Number:
001001000101000010000100001001000110
000010000100001001000101
Binary Host ID:
00000000000001110000000001001001000
000000000101001011000111000011000010
Binary Serial Number
0110000111000100010000000000000000
00000000000000001
Binary License Auth Num
00001000010000011000100000101000110
000111001000001001000000
    
```

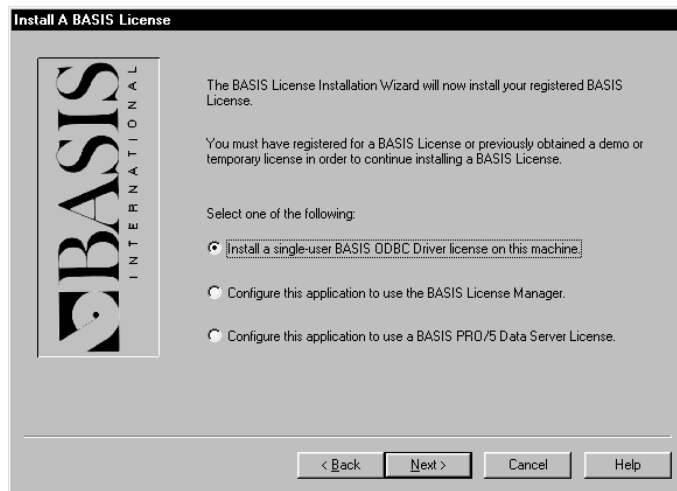
- To complete the installation of your driver, call the phone number on the printout. Follow the instructions on the voice recording to specify the information on the printout and to register your license.

## Registration and Delivery

---

Once you receive the information, follow these instruction:

1. On your Windows desktop, click **Start**, point to **Programs**, then to **BASIS ODBC Driver 3.01**, then select **Install a BASIS License**.
2. The Install A BASIS License screen appears. Click **Next**.



3. Select the **Enter License Information** option. Enter the information received from BASIS into the appropriate fields and click **Next**.

**BASIS License Installation**

Locate License File

Type the location and name of the license file. Or search for the file by clicking Browse.

License File:

Enter License Information

Feature:	<input type="text" value="ODBC_RO"/>	Encryption Code:	<input type="text" value="006007B67D5A"/>
License Rev:	<input type="text" value="3.0"/>	Host ID:	<input type="text" value="006007BD5A"/>
Expiration:	<input type="text" value="permanent"/>	Checksum:	<input type="text" value="160"/>
Number of Users:	<input type="text" value="uncounted"/>	Serial Number:	<input type="text" value="DSH000001"/>

4. If you use OSAS<sup>CS</sup> for Windows or UNIX/Linux, enter the name of the server that is running the Data Server. If you are using standard OSAS or OSAS<sup>CS</sup> for Novell, leave the field blank. In either case, click **Next**.

**BASIS Data Server Connection**

**BASIS INTERNATIONAL**

If you are planning to connect to a BASIS Data Server, you must specify the name of the server where the BASIS License Manager is running that contains the available licenses for the BASIS Data Server.

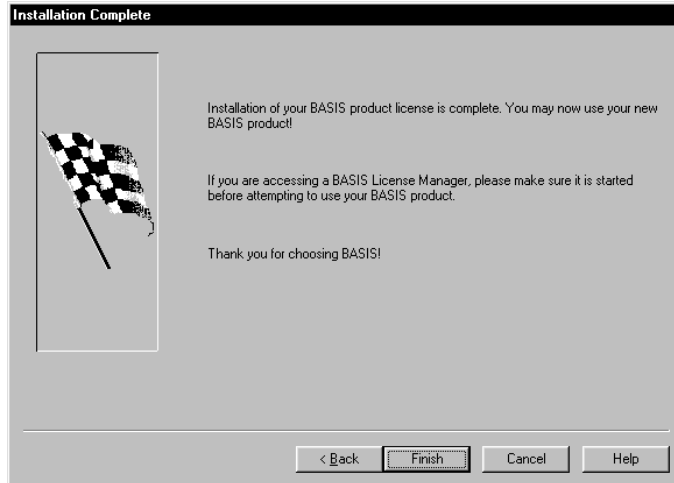
If you are unsure of the name of this server, please contact your system administrator for assistance.

If you will not be using a BASIS Data Server, leave the edit box empty and click Next.

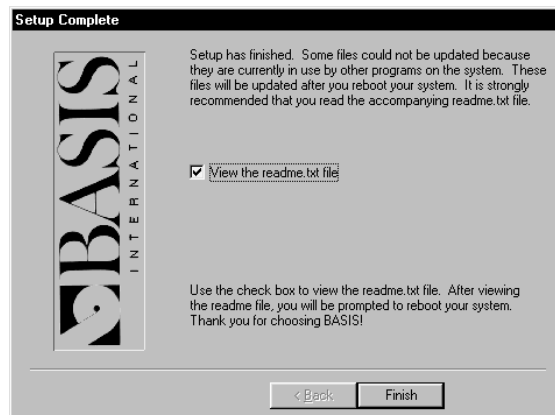
## Registration and Delivery

---

5. Click **Finish**.



6. If you do not want to view the readme.txt file clear the check box. Otherwise, click **Finish**.



7. The Setup Complete screen appears. If you do not want to restart your computer, select the **No** option. If you do want to restart your computer now, first be certain that all other programs are closed. Click **Finish** to activate your ODBC driver.



8. Before you use the ODBC driver you must:
  - Install the ODBC Kit from your OSAS media.
  - Create the config.tmp file (see page 3-3).
9. Once you have completed these two steps, you can follow the Installing ODBC Drivers instructions page 2-19.

## Other

The Other option is useful for installing your license if the computer on which you installing does not have E-mail or Internet access.

1. In the Registration Method box, select the **Other** option.

The screenshot shows a dialog box titled "License Registration and Delivery Methods". It is divided into two main sections: "Registration Method" and "License Delivery Method".

**Registration Method:** The question is "How do you want to send your license information to BASIS?". The options are:

- Web Browser
- Email To: license@basis.com
- Telephone
- Fax
- Other

**License Delivery Method:** The question is "How do you want BASIS to deliver your permanent license?". The options are:

- Web Browser
- Email Address: [empty text box]
- Fax Number: (952) 496-2495
- Country: USA/Canada (dropdown menu)

Below the "Fax Number" option, there is a note: "Include your area or country code in the fax number".

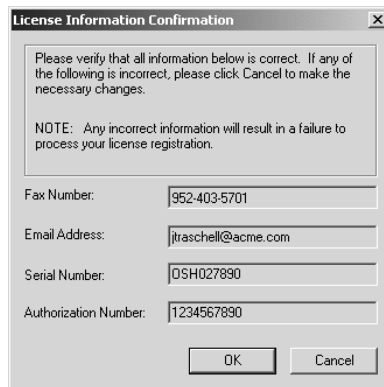
At the bottom of the dialog box, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

2. Select either the **Email Address** or **Fax Number** option (depending on how you want to receive the license) and enter the e-mail address or fax number at which you want to receive the license file information. If you entered a fax number, select the appropriate country in the **Country** list box. Click **Next** to continue.

3. Read the **WARNING!** screen's instructions carefully. Click **OK** to proceed.



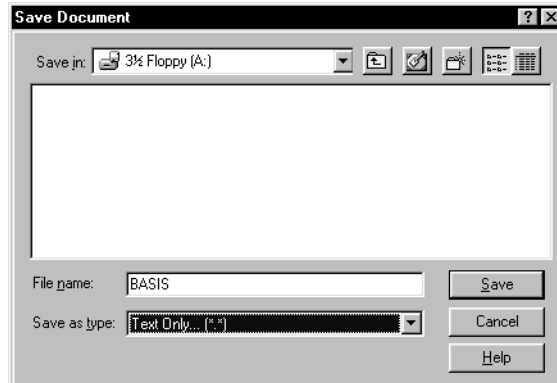
4. The License Information Confirmation screen appears. Confirm the information listed, and if it is correct, click **OK**. If it is not correct, click **Cancel** and reenter the information.



## Registration and Delivery

---

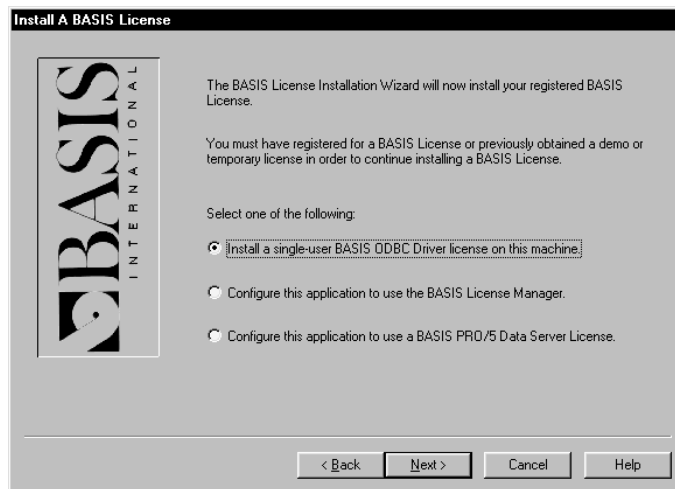
5. The Save As screen appears. Save the license file onto a diskette (or on a network drive). Click **Save**.



6. Access the file on the diskette or the network drive from a computer with e-mail access.
7. Send the file to BASIS via e-mail.
8. An e-mail message or fax is sent to you from BASIS. Follow the instructions to register the license information on the original computer.

Once you receive the information, follow these instructions:

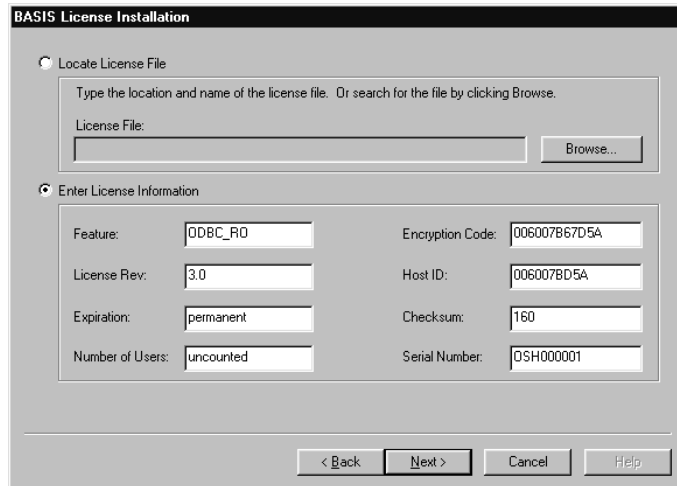
1. On your Windows desktop, click **Start**, point to **Programs**, then to **BASIS ODBC Driver 3.0**, then select **Install a BASIS License**. The Install A BASIS License screen appears. Click **Next**.



## Registration and Delivery


---

2. Select the **Enter License Information** option and enter the information received from BASIS into the appropriate fields. Click **Next**.



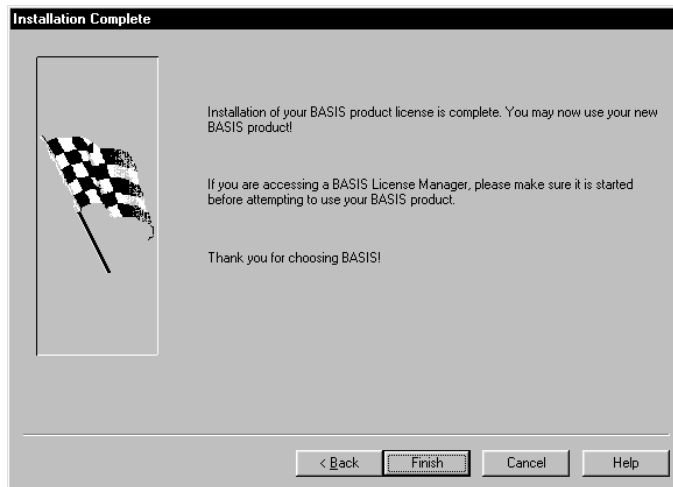
The dialog box is titled "BASIS License Installation". It has two radio buttons: "Locate License File" (unselected) and "Enter License Information" (selected). Under "Locate License File", there is a text box for "License File:" and a "Browse..." button. Under "Enter License Information", there are several text boxes: "Feature:" (value: ODBC\_RO), "Encryption Code:" (value: 006007B67D5A), "License Rev:" (value: 3.0), "Host ID:" (value: 006007BD5A), "Expiration:" (value: permanent), "Checksum:" (value: 160), "Number of Users:" (value: uncounted), and "Serial Number:" (value: 0SH000001). At the bottom, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

3. If you use OSAS<sup>CS</sup> for Windows or UNIX/Linux, enter the name of the server that is running the Data Server. If you are using standard OSAS or OSAS<sup>CS</sup> for Novell, leave the field blank. In either case, click **Next**.

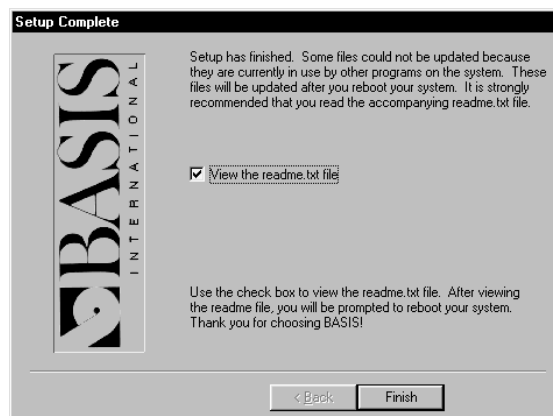


The dialog box is titled "BASIS Data Server Connection". On the left is the BASIS International logo. On the right, there is instructional text: "If you are planning to connect to a BASIS Data Server, you must specify the name of the server where the BASIS License Manager is running that contains the available licenses for the BASIS Data Server." followed by "If you are unsure of the name of this server, please contact your system administrator for assistance." and "If you will not be using a BASIS Data Server, leave the edit box empty and click Next." Below the text is a text box containing "file\_server". At the bottom, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

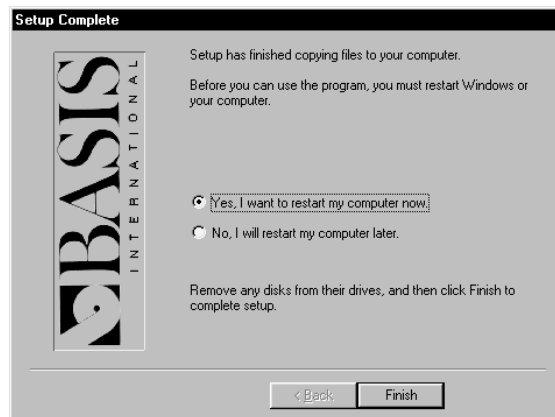
4. Click **Finish**.



5. If you do not want to view the readme.txt file, clear the check box. Otherwise, click **Finish**.



- The Setup Complete screen appears. If you do not want to restart your computer, select the **No** option. If you do want to restart your computer now, first be certain that all other programs are closed. Click **Finish** to activate your ODBC driver.



- Before you use the ODBC driver you must:
  - Install the ODBC Kit from your OSAS media.
  - Create the config.tmp file (see page 3-3).
- Once you have completed these two steps, follow the Installing ODBC Drivers instructions page 2-19.

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