

LAWSON

M3 Smart Client Navigation Quick Reference Sheet

FOR TRAINING PURPOSES ONLY



Logging into the Training Environment (TRAIN01)

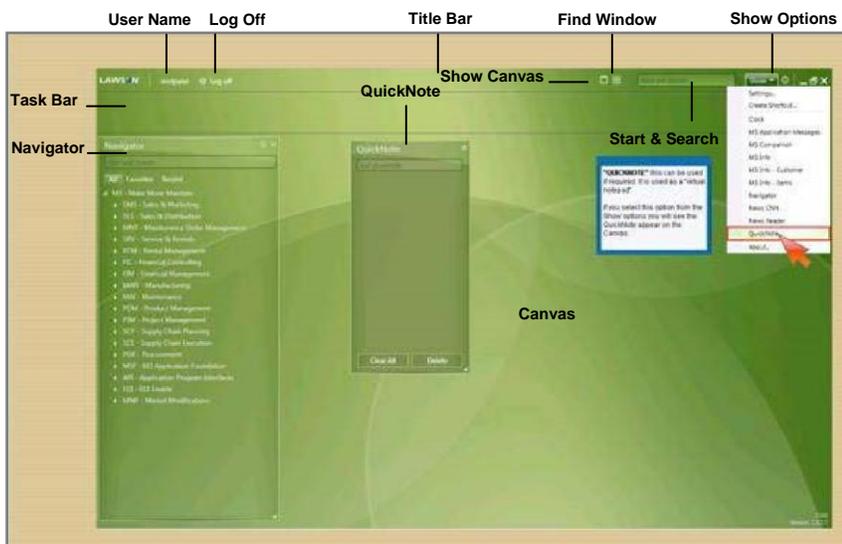
Click START>PROGRAMS>PREPROD>Click DEV_LAWSON SMART CLIENT

1. Enter USERNAME
2. Enter PASSWORD
3. Click LOG ON

Note: If you do not have a username and password, please contact Support at Helpdesk@abc.us or call (310) 555-1212.

M3 Smart Client Interface

Running Smart Client via Citrix



To establish a Remote Desktop Protocol/Session (RDP):

Click START>PROGRAMS>ACCESSORIES>REMOTE DESKTOP CONNECT>Type "TRAIN01">Click CONNECT>Type ABC domain credentials (same as desktop computer login)>Click OK>In Citrix XenApp window>Type OPEN domain credentials>Click OK>Click Citrix XenApp Client icon>Double-click to launch preferred M3 Smart Client>Type M3 credentials

To change the M3 Smart Client environment:

Click SHOW>SETTINGS>SYSTEM PROFILE Tab>Select preferred M3 Smart Client>Click SAVE>Log Off>Log On

Navigator

To access the Navigator:
Click M3 drop-down arrow>ALL Tab>FAVORITES Tab>RECENT Tab

QuickNotes

To access the QuickNote function:
Click SHOW>QUICKNOTE

To clear all QuickNotes:
Click CLEAR ALL

To delete a QuickNote:
Click DELETE

To add a QuickNote:
Type note>Press '+'

Shortcuts

To create a shortcut for quick access to M3 programs and Internet pages:
On CANVAS>Drag/Drop program from NAVIGATOR to CANVAS – or – Drag/Drop open program from TASK BAR to CANVAS – or –Click SHOW>CREATE SHORTCUT – or – Right-click CANVAS>CREATE SHORTCUT

Open/Close Programs

To open a program using the Start and Search function:
In START AND SEARCH field>Type "MMS001">Press ENTER>Double-click result>Click CLOSE

To open a program using the Navigator:
Click ALL Tab> EXPAND>Find ITEM.OPEN (MMS001)>Double-click to open>Click CLOSE

Groups

To create a new group:
Right-click NAVIGATOR>NEW GROUP>In CREATE NEW GROUP field>Type group name>Click OK

To add a program to a group:
In NAVIGATOR>Right-click program>ADD TO FAVORITES>Select group

To view a program added to a group:
Click FAVORITES Tab

Panel Functions (Basic Options)	Shortcuts Cont'd	Open/Close Programs Cont'd	Inquiry Types										
<p>To select a record: Select record>Click SELECT</p> <p>To duplicate a record: Open CUSTOMER.OPEN (CRS610)>Find customer>Press CTRL+3>In the 'C' panel>Type new customer number>Click NEXT>In 'E' panel>Type new customer name>Click NEXT to return to 'B' panel>Click REFRESH</p> <p>To display a record: Select record>Click DISPLAY</p> <p>To delete a record: In CUSTOMER.OPEN (CRS610)>Type customer number>Press ENTER>Press CTRL+4>In 'D' panel>Click NEXT>Click REFRESH</p> <p>To refresh a page: Click REFRESH</p>	<p>To create a shortcut for ITEM.OPEN (MMS001): On TITLE BAR>Click SHOW>CREATE SHORTCUT – or – Right-click CANVAS>CREATE SHORTCUT>Select icon>Type 'Items' in NAME field>Type 'mforms://mms001' in TARGET or URL field>Type 'Item Master' as tool tip</p> <p>To view list of shortcuts: Click SHORTCUTS icon</p>	<p>To open a program using the Recent tab: Click RECENT Tab>Find ITEM.OPEN (MMS001)>Double-click to open>Click CLOSE</p> <p>To open a program using Favorites tab: Click FAVORITES Tab>ITEM.OPEN (MMS001)>Click ALL or RECENT Tab>Select ITEM.OPEN (MMS001)>Right-click>Select ADD TO FAVORITES>Click HOME>Click OK</p>	<p>There are 10 system-defined Inquiry Types:</p> <table border="0"> <tr> <td>1 = Item No</td> <td>6 = Alias</td> </tr> <tr> <td>2 = Name</td> <td>7 = Related</td> </tr> <tr> <td>3 = Optional</td> <td>8 = Status</td> </tr> <tr> <td>4 = Drawing</td> <td>9 = Style</td> </tr> <tr> <td>5 = Item Group</td> <td>10 = Item Name Opt</td> </tr> </table> <p>In INQUIRY TYPE field>Click drop-down arrow>Select menu item</p> <p>To create user-defined Inquiry Types: Permissions are necessary</p> <p>To view user-defined Panel Versions: Open CUSTOMER.ORDER (OIS300)>In INQUIRY TYPE field>Select 1- ORDER NUMBER>in PANEL VERSION field>select PANEL 1>In PANEL VERSION field>Change panel version to PANEL 2>Leave INQUIRY TYPE field as is</p>	1 = Item No	6 = Alias	2 = Name	7 = Related	3 = Optional	8 = Status	4 = Drawing	9 = Style	5 = Item Group	10 = Item Name Opt
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<p>Panel Functions (Actions)</p>	<p>Panel Functions (Actions) Cont'd</p>	<p>To view multiple open programs: On CANVAS>Click SHOW CANVAS</p> <p>To close a program on Task Bar: Click CLOSE</p> <p>To expand view of multiple opened programs: Hover cursor over a program</p> <p>To find a specific program when several programs are open: Click FIND WINDOW>Select program</p> <p>To switch between programs: Press CTRL + TAB</p> <p>To maximize an open program: Click MAXIMIZE</p>	<p>Search</p>										
<p>To use F7 and F8 shortcuts on the 'E' panel: Open CUSTOMER.OPEN (CRS610/B)>Select record with OPTIONS DISPLAY>Press F8 to scroll forward>Press F8</p> <p>To access 'P' panel: Click ACTIONS>SETTINGS</p> <p>To select a panel to enter data or browse information: In OPENING PANEL field>Click drop-down arrow>Select A-ENTRY or B-BROWSE panel</p> <p>Panel sequences include: Panel A – displays the opening panel to enter information Panel B – displays a list view of all records Panel C – displays copying of record(s) Panel D – displays deletion of record(s) Panel E–N – displays panels to enter information and detailed information Panel P – displays parameter values specified by user</p> <p>To change panel view: Right-click bottom-right screen>Click PANEL VIEW>Select SMALL or LARGE option</p> <p>To remove a panel: Click CLOSE (X)</p>	<p>To view panel details: Open CUSTOMER.OPEN (CRS610/B)>Right-click PANEL SEQUENCE>Select DIRECT CHANGE>Double-click record to view>Click NEXT to view 'F' panel>Click NEXT to view "H" panel>Click PREVIOUS to view 'F' panel>Click PREVIOUS to view 'E' panel>Click PREVIOUS again to return to 'B' panel>Click CLOSE</p> <p>To view the Options menu: Click OPTIONS</p> <p>To view the Related Options menu: Open CUSTOMER.OPEN (CRS610)>Select record>Right-click>Select RELATED OPTIONS</p> <p>To create multiple delivery addresses for a customer: Click EXPAND TOOLBOX list>Click CLOSE</p> <p>To specify Related Options 11 thru 19 in panel sequence: Enter numbers 1 thru 9 in the sequence>Open CUSTOMER.OPEN (CRS610)>Type 'EF1' as the Panel Sequence>Select a record>Press CTRL+5>In 'E' panel>Click NEXT>In 'F' panel>Click NEXT again>In CUSTOMER.CONNECT ADDRESSES (OIS002)>Click CLOSE</p> <p>To access Related Options menu via shortcut: Right-click record>Select RELATED OPTIONS</p>	<p>To perform a generic search: In ITEM NUMBER field>Type item number>press ENTER</p>	<p>Help</p>										
			<p>To access the F1 Help function: Open CUSTOMER.OPEN (CRS610/B)>Select record>OPTIONS CHANGE>In 'E' panel>Hover cursor over OUR SUPPL NO label>Click CLOSE</p>										
			<p>Browse</p> <p>To activate F4 Browse function: Press F4</p>										