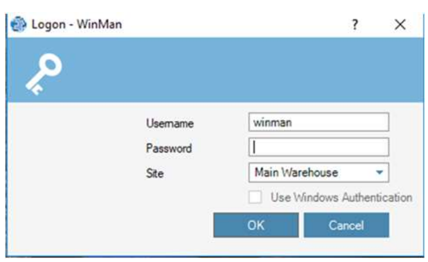
Product Training
WinMan Navigation

Where "Lean" principles are considered common sense and are implemented with a passion!

winman ADVANCED ERP SYSTEMS

Basics for using the system

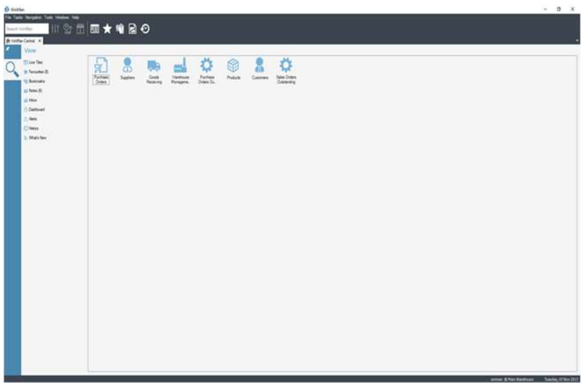
For training, login to the system using <user> WinMan, <password> WinMan. For in-house systems, the system administrator will provide you with the logon credentials.



WinMan Central

Favourites

Once logged on you will be in the WinMan Central area which is always open while running WinMan. The initial folder view will be your ‘Favourites’. An example user logon with Favourites established is shown below.

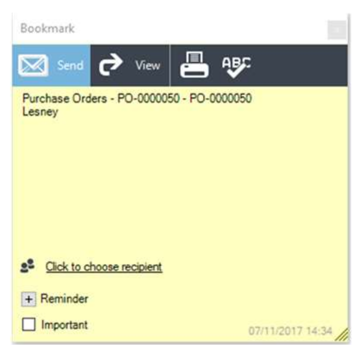


- ❑ The Favourites Icons are user specific shortcuts to WinMan modules or reports and can be arranged in the following methods;
  - Details
  - Small Icons
  - Large Icons
  - List
- ❑ Favourites are set up by going to the required module and selecting **Tools/Add to favourites**. After adding favourites the WinMan desktop will show the shortcut icons.

WinMan Central

Bookmarks

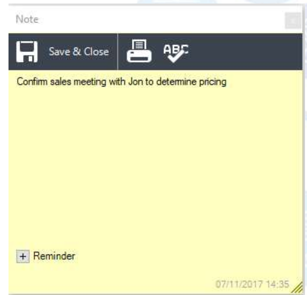
- ❑ Bookmarks are similar to Favourites, but can link to specific pieces of data or a report. A bookmark could be a BOM or sales order that is used frequently.
- ❑ A bookmark automates the step of finding the WinMan module and searching for the specific record
- ❑ Bookmarks are added using Tools/Add Bookmark.
- ❑ Bookmarks can also be sent via email to anyone. The email will contain the same information as found in WinMan. As the bookmark is in email format, there is no drill down functionality and it will not appear in the Bookmarks section of WinMan Central.
- ❑ A bookmark can also be sent to another WinMan user using Tools/Send Bookmark. Multiple users can be sent a bookmark at the same time



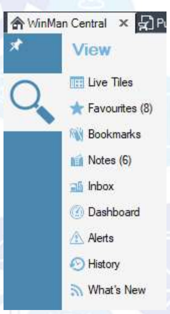
WinMan Central

Notes

- ❑ Notes can be used to store any kind of reminders or notes about anything
- ❑ Use the mouse to click in the open space of the note to begin note entry
- ❑ Notes are added using Tools/Add Note.
- ❑ Notes can be send to other WinMan users using Tools/ Send Note.



WinMan Central



Inbox is used in tandem with process controls. If a particular process control triggers an email then it can be seen in the inbox.

Dashboard is user specific. This is used to display a 'default' report that can be accessed at any time. There are many dashboard reports that can be used. These can be viewed in the reports area of WinMan. Dashboards will update every 30 seconds.

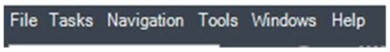
History will display the most recent records reviewed as well as the module they were reviewed in. History items work like bookmarks, in that you can double click the history item and it will open the module on the specific record.

SYSTEM SETTING:

- ❑ The default number of history items is 30. This number can be increased but the larger the number, the more requirements that will be put on the server and performance can be affected. To change the number of items in history, use the General setting User history records and set the number of history records required.

- ❑ Items in WinMan Central will refresh once every 60 seconds (with the exception of the dashboard that updates every 30 seconds). The rate of refresh can be adjusted using the General system option Set the polling interval for WinMan Central in milliseconds (Default is 60000). Enable the option and set the value in milliseconds for the frequency of WinMan central being refreshed.

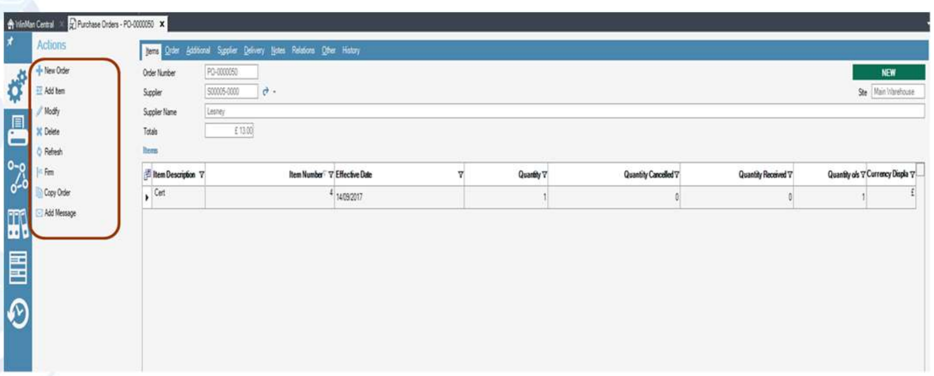
WinMan Toolbar



- **F**ile actions allow closing a module (i.e. sales order entry) or exiting WinMan entirely.
- **T**asks are functions available for the active program. This will include the actions and prints as well as a menu item for system tasks.
- **N**avigation launches the drop down menus to all accessible areas.
- **T**ools remain consistent among the WinMan areas once the user leaves the WinMan central area.
- **W**indows allows control of Window layers and is a handy way to close all windows while keeping WinMan open.

WinMan Toolbar

Tasks

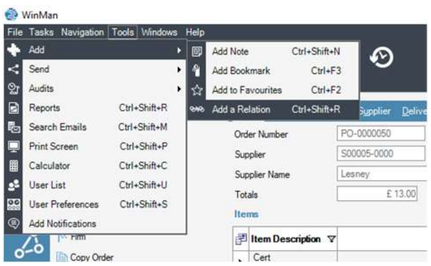


Manipulation of the data can be done using the application specific actions at the side of the screen or the drop down tasks menu.

WinMan Toolbar

Tools Menu

Through the Tools Menu many actions can be accomplished and time savings recognised.



- **Reports** – Brings up a listing of all available reports.
- **User Preferences** – Manage your user information including your address and phone number, your password details, as well as your dashboard settings.

WinMan Toolbar

Send Tools

Send Email - Send an email. Email templates can be used and with the outlook integration the Outlook address book can be accessed.

Send Letter – A form letter can be sent to a WinMan contact or company with contact/company information being inserted into the form letter automatically. See the WinMan CRM documentation for setup of form letters.

Send Fax – If a Fax integration is setup a fax can be sent from WinMan.

WinMan Toolbar

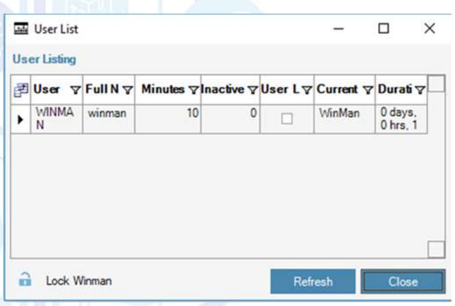
Audit Tools

Manage Detail Auditing – Detail auditing is managed per module per table. For example in the Sales Order Module detailed auditing can be turned on for Sales Orders and/or Sales Order Items.

- Detail auditing gives full detail of the record as it was before a change and after the change. Not using Detailed auditing will provide less detail for any changes made.
- To view a detailed audit, the tables that are available in each module will appear below the Manage Detail Auditing menu option. The audit details displayed will be for the record current in the module.

WinMan Toolbar

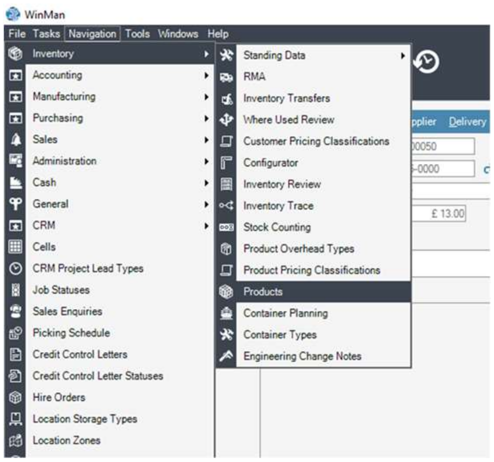
User List



The user list will provide a list of all active users logged into WinMan and well as for how long.

If licenses are all being used, this is tool that can help monitor if additional licenses need to be purchased.

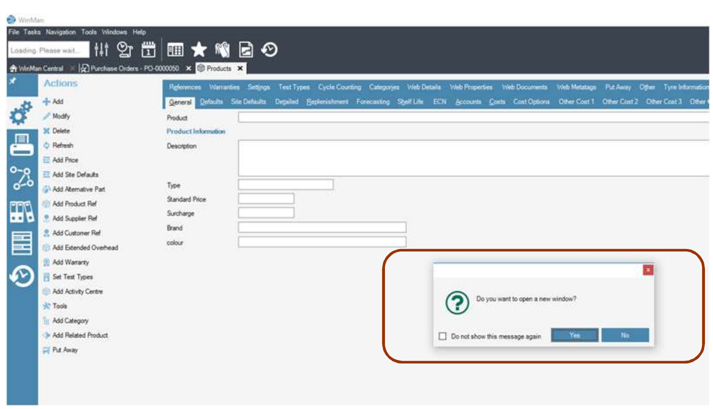
Navigation



- To open the different areas of the system select the menu option from the Navigation menu.
- Use the Find option to type the program name without searching the menu structure.

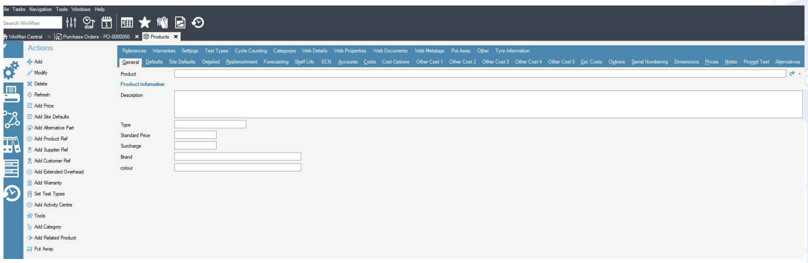
Navigation

Multiple windows can be opened simultaneously, however if the window selected is already open, a message will be displayed asking if you would like to open a new window. Multiple windows of the same logic can be open at the same time with same or different data.



Navigation

When first accessing a screen we start with a “fresh page” that has no data on it. Here is a “fresh” product screen.



Searching for Data

To display existing records use the search option from the top right of the screen. Use * as the wildcard search or ? for an individual character.

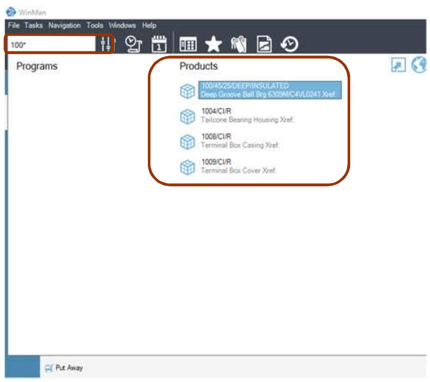
The wildcard search is effective in standing data modules. However when in modules with large data sets, users should avoid the wildcard and refine the search.

The results from the search are displayed in a window. Open the required record by either double clicking the line or selecting it and clicking **OK**. If an exact match was found from the selection the system will go straight into that record.

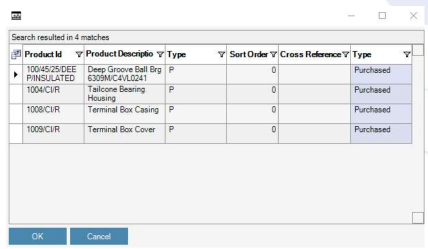
SYSTEM SETTING:

- The number of results returned for a search by default is 100. This number can be changed, but the larger the number, the more performance will be affected. To change the maximum number of results returned from a search use the General setting **Maximum Search Results**. The setting should be enabled and the value should be the maximum number of records to be returned.

Searching for Data

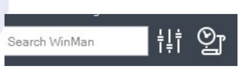


- ❑ Enter the search criteria in the Search dialog.
- ❑ The records matching the search will be displayed.
- ❑ Double click the record to be viewed.



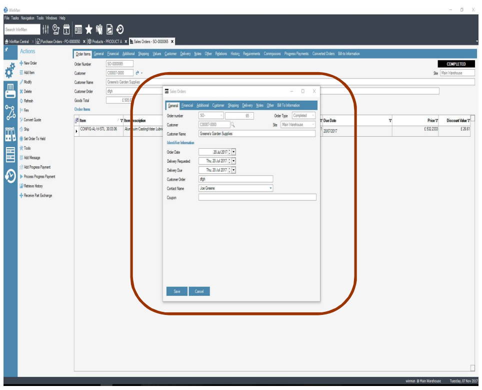
Searching for Data

WinMan allows other ways for quickly finding your data. If you select the down arrow (right beside the green arrow for searching) you will have the option for the last 10 system records or your last 10 records. The last 10 system records are the last 10 records that anybody using WinMan would have worked with. Your last 10 records are the last 10 that you have actually worked with. In some screens, you will also have an advanced search option which gives the option to search for a record based on something other than the default index.



Down arrow for extra searches

Modifying Data

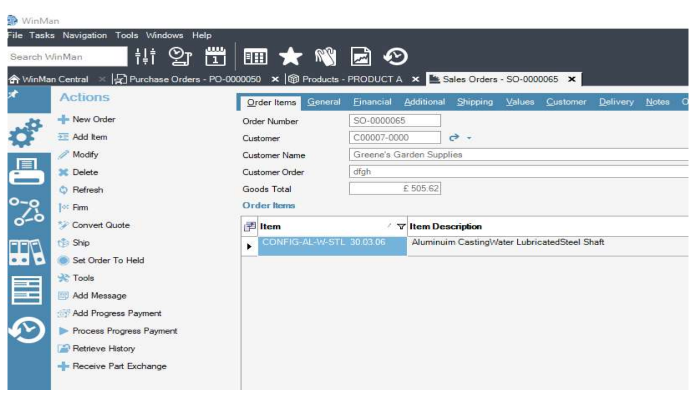


- When opening a record, the screen will show the data in "read only" mode; to amend the data the user must click on **"modify".** Clicking on **"modify"** will cause a new window will to open. The data may now be changed.
- Double clicking on the field to be modified will also open the modify screen.
- Only those users with the proper permissions will be able to modify the screen.
- When in a module with a header and line items, the modify action will always open the header in modify mode. Line items should be double clicked, or right clicked on the line and select Modify

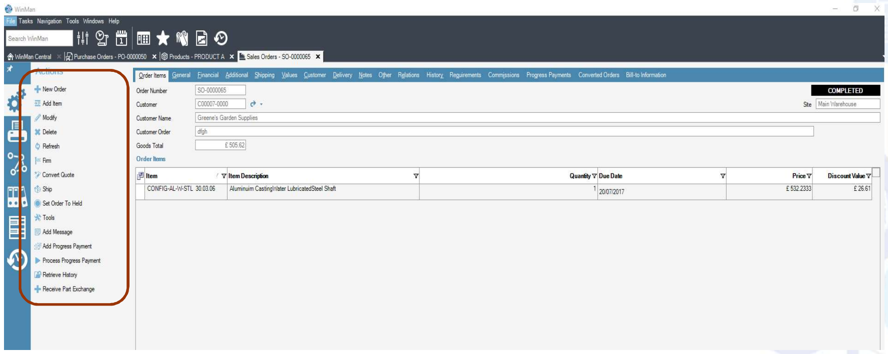
Deleting Data

Using the action Delete, WinMan will check to make sure the record can be deleted before actually deleting the current record. If the record can not be deleted, the user will be alerted.

When in a module with a header and line items, using the Delete action will delete both the header and all the line items. If only a specific line item is to be deleted, right click on the line and select Delete.



Actions



Actions are specific to an area and will include how you might complete a task. The actions in the sales order entry area will be different that those in the shipping area.

Recent

- ❑ The Recent area will display the most recent records a user has accessed in a specific module.
- ❑ By clicking on an item in the Recent area, the item selected will become the active record in the module.
- ❑ The Recent area will track the last 5 records accessed in the module

SYSTEM SETTING:

- ❑ The number of records found in the recent area can be adjusted. The area for Recent records is fixed so if the number of records specified does not fit in the area, the records must be scrolled. To change the number of Recent records use the General setting **Maximum MRU Items**. Enable the setting and use the number of records required as the value.

Reports and Relations

This Panel allows your system administrator to relate other programs or reports that are used closely with the current program but may not be part of a standard drill down or look up. The advantage here is that a user will not have to go through the standard navigation to get to something that they do on a repetitive basis.

To add a relation, simply access the program that a relation is to be added to. Select Tools, and then Add a relation. A dialog with all WinMan programs will display and ones that are to be relations, need to be checked.

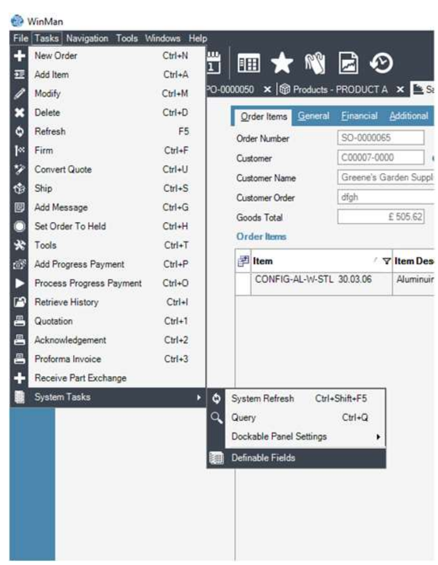
To relate a report, access Reports from the Tools Menu. Find the report that is to be related and right click on it. Select the option Relate to program and select the program that the report is to be related to.

Definable

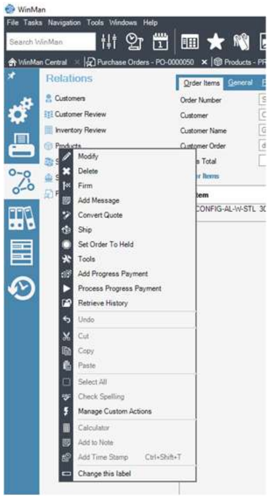
The Recent area will display the most recent records a user has accessed in a specific module.

By clicking on an item in the Recent area, the item selected will become the active record in the module.

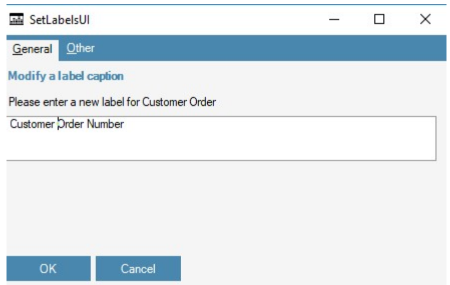
The Recent area will track the last 5 records accessed in the module



Changing Labels



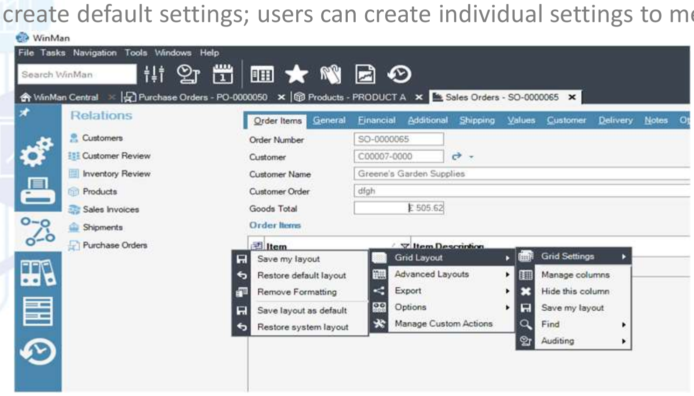
To change a label simply right click on the label and select the option to Change This Label.



Grid Management

Grids, or detail blocks can be managed from within WinMan. Fields can be either selected or de-selected, columns can be dragged and arranged in any order and column widths can be adjusted.

Administrators can create default settings; users can create individual settings to meet their individual needs.

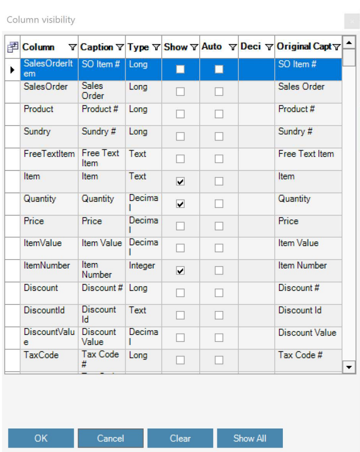


Grid Management

To change columns, right click on a column heading of the grid, select Grid Settings and Manage columns. A list of all the available fields will display. To select a field to be displayed, click the Show column. Auto size will adjust the width of the columns based on your screen display. Lock column will lock the column in place that the size can not be adjusted by the user.

A specific column that is displayed can also be managed without going into Manage Columns. A user can right click on the column to be managed and after selecting Grid settings can select Spring Column or Hide Column. Hide Column removes the column from the grid display (but can be re-selected through Manage Columns). Spring column has the same affect as the Auto size functionality in Manage Columns.

Grid Management

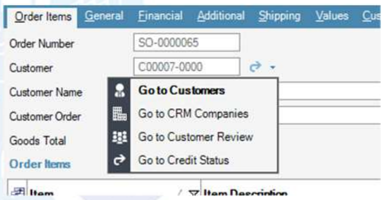


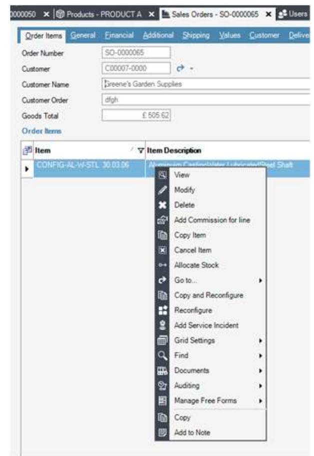
Once a grid has been set up it can be saved as the default. To save settings, right click on a column, select Grid Settings, then select Grid Layout, and Save Layout as Default. All users will have this default setting when they first login. At any point users can adjust their grid settings to reflect their own needs. Users can then save their custom layout by right clicking on a column, select Grid Settings, then select Grid Layout and Save as my default. If they would like to go back to the default settings, instead of Save as my Default, the user can select Restore default layout.

Data can also be sorted in a grid by clicking on the column heading that is to be sorted. To reverse the order that the data appears in, simply click the column heading a second time and the order will reverse itself.

Drill Downs

Data within a grid or data that is on a tab can be drilled down from. Data on a tab can be drilled down using the blue arrow seen below. If the black down arrow is present, click on it and any additional drill downs will display, as seen below, then simply select which drill down is required.

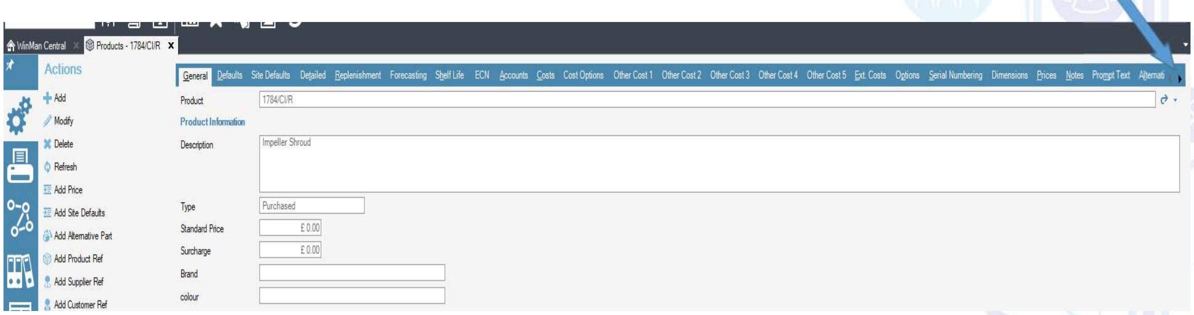




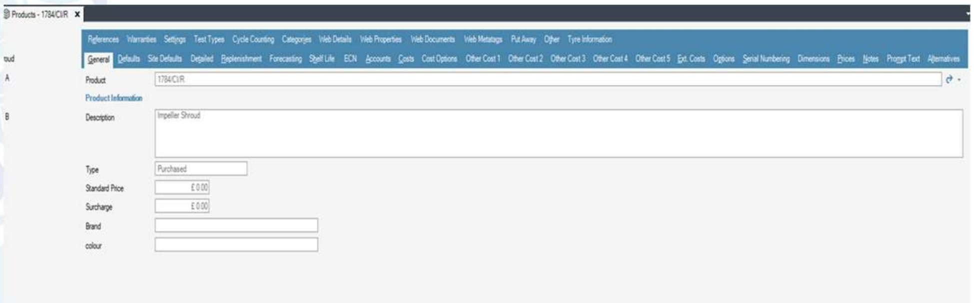
Data can also be drilled down from data on a grid. Simply right click on the line of data to see drill down options. In the example to the right, the options to drill down include a drill down to products and a drill down to inventory review. Drill downs on each grid will be unique to the data within the grid.

Tab Management

Tabs within a specific module can be set up a couple of ways. In modules that have too many tabs to fit on a screen, the extra tabs are accessed by using the scroll arrows.



Tab Management

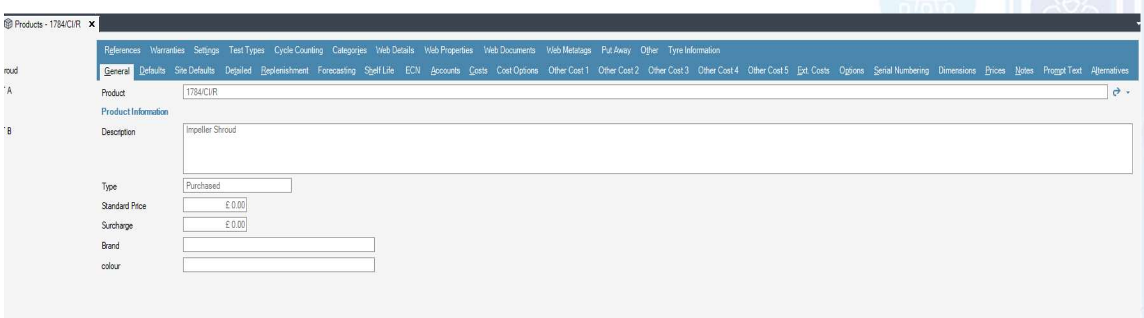


SYSTEM OPTIONS:

- Using the Style system option **Wrap Tabs** the tabs can be wrapped to fit on the screen. Enable the option and set the value to Y to enable tab wrapping. When using the Wrap Tabs option, another advantage is that the tab currently being accessed is much more visible.

Tab management

Tabs within a specific module by default are scrolled across the top of the module right below all the open modules



Tab Management

SYSTEM OPTIONS:

- ❑ Using the Style system option **Section tab orientation** to move the tabs from the top of the module to the left of the module. Enable the option and set the value to L to move data tabs to the left of the module.