Infor XA Net-Link (Release 10) User Guide

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What is Net-Link?

Net-Link is similar to PowerLink but accessed via the Internet on any type of browser (Microsoft Edge, Chrome, Firefox, etc.). Your IT department will need to provide the URL address used to access Net-Link. The VPN to your company's AS400 must be active on the PC to connect to Net-Link and is accessed via a URL address that your company can provide. The advantage of Net-Link is that there are no programs that reside on your PC making it more efficient to use than PowerLink. Both Net-Link & PowerLink will update the XA files when you create orders, process transactions and perform file maintenance.
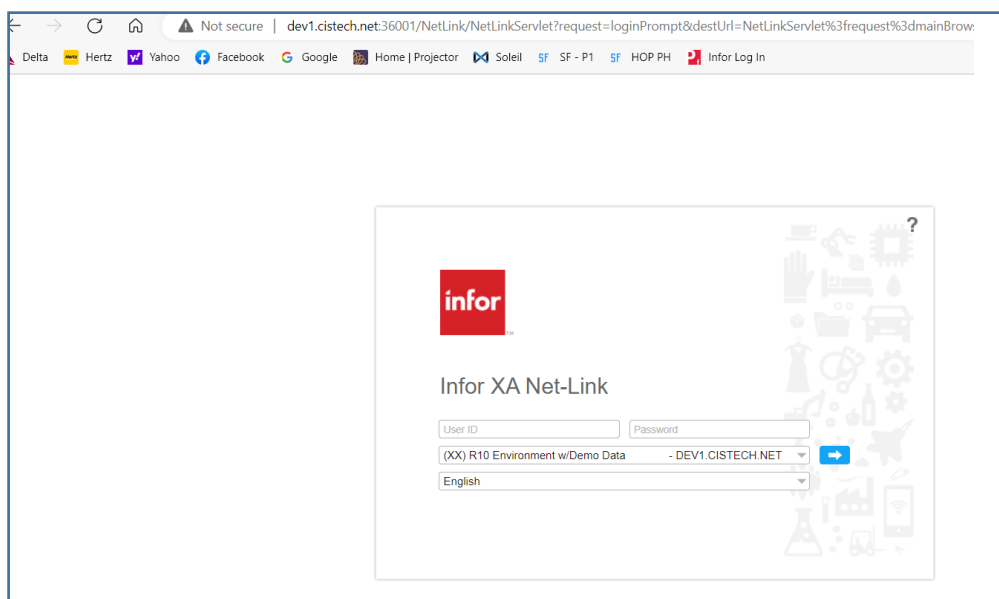

At Release 10 of Infor XA, all of the functions (customizing views, subsets, cards, etc.) that exist in PowerLink have been created in Net-Link with the exception of workbenches. Workbenches have been replaced by split screens in Net-Link which are discussed later in this document.

As Infor expands their offerings of such packages as ION (a workflow application) & Mingle (social networking/chat among other employees), Net-Link will become the preferred method of interacting with other people in your company as well as performing your day to day tasks in XA.

To log into Net-Link, you enter the same User ID/Password that you use for PowerLink and/or Green Screen. Use the pull down list of active environments to choose which environment you want to go into. Note that there is no 'Add' button to add an environment. If the IT department has started the environment with Link Manager, it will appear in the list of environments so you can choose the appropriate environment (test, live, etc.). Click on the blue arrow to enter the environment:

Net-Link has the same 'look & feel' as PowerLink. It uses the same security settings over the tasks and business objects as PowerLink. This is what the home screen of Net-Link looks like:

Card Tabs

Business Objects
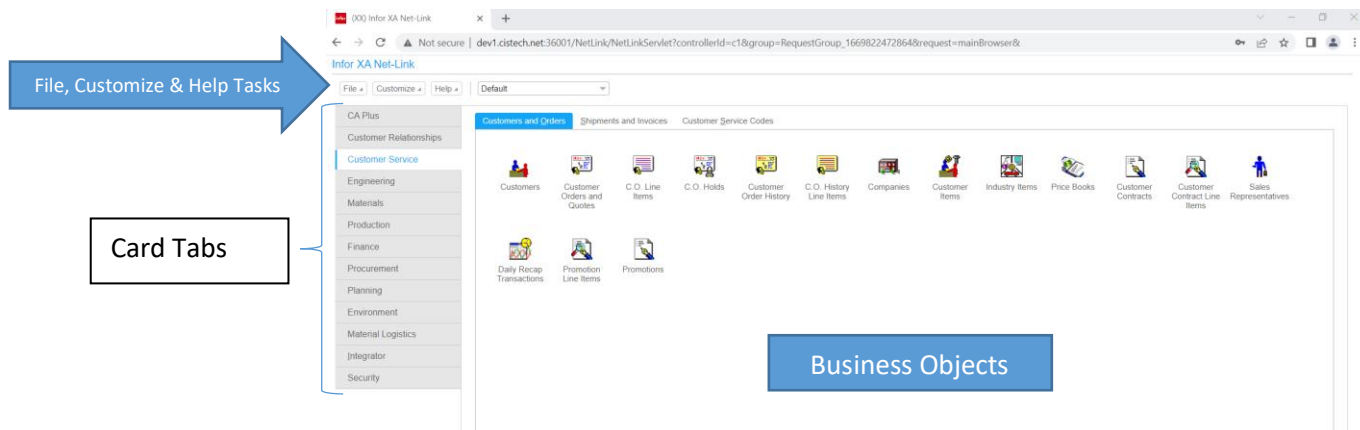
Screen Layout

- The Net-Link menu bar is in the upper left corner of the cards
- Tabs for the cards held in the Card File are on the left side of the screen
- If the card is a 'tabbed' card (Engineering, Customer Service, Materials, etc.) the tabs to the other cards will be at the top of the screen instead of the bottom

Application Cards

- Each XA application has a tab that holds cards to allow access to the data.
- These cards can be customized to add or remove Business Objects from the card.
  - IMPORTANT NOTE: Do not change the card that Infor provided.   For example, if you need to add or remove objects from the 'Customer Service' card displayed above, copy the Infor provided card to a new card ('Cistech Cust. Service') and make the changes on the card that is specific for your company.   This way if Infor makes changes via an upgrade it will not impact your company's custom card.
  - This same note applies to views, subsets, templates, etc. throughout Net-Link

Business objects

- The icons on the card are called 'Business Objects'.   They are created by Infor or your IT department to provide access to the data in the file.
- Double clicking on an Object will open a list of records for that file.
- An Object has 'relationships' to other files that are defined by Infor or your IT department so that information/fields from other Objects can be displayed in the list.
  - For example, the Item Warehouse file has a relationship to the Item Revision file so that Item Revision fields (Item Type, Item Description, etc.) can be displayed on a list of Item Warehouse records.
- Standard XA business objects are defined by Infor but your IT department can create new objects over custom files that they've created.   Once the object is created, it can be added to an application card.

- Split screen functionality allows a list to be displayed on one side of the screen and, when you click on a record, update another window of your choosing.
- The same object can be added to multiple cards for ease of opening. There is no difference in the data when the object is opened from a different card. For example, the Item Warehouse object can be on the Materials Inventory (default) card but added to Engineering, Customer Service and Production so that it is easily accessible to each department that needs to see the information stored in the record.
- When adding an object to a card, you can define a 'Work Space' (see section below) to specify the view, subset, sort, etc. to be used when opening that object.

Net-Link Buttons

Home: Return to the home page/card & card file.

Create/Add/New: when you hover over this button, you may get any one of the 3 descriptions (Create, Add or New). Use it to create new Items or Orders, add item numbers to a PO or CO, etc.

Change: Change a record.   Will open a card file with the fields made available to be changed.

Quick Change: Builds a temporary template using the fields in the view. When you check the 'Auto Advance' option, it will move to the next record automatically so that you don't have to open the card file for each item to change the same field.

Delete: Delete the record.

Copy: Copy an item, order, code to a new item, order or code and then make changes to the copied record.

Apply: Apply a view, subset, sort, etc. to a list.

Locate: Jump to a specific record.   The fields displayed in the locate window are controlled by the sort being used for the list.

Details: Opens card file or you can double click on a record to open the card file.

Attachments: Almost any document/record that resides on your company's network can be attached to an item or order using Attachments.   For example, item drawings, specification sheets, etc.

Maintenance History: Shows a history of changes to a record, who made the change and the before/after for the fields that were changed.

Local print: Prints a list to a printer that is attached to the PC or resides on the company's network.

⭐   **Mark as favorite**: Limits the views, subsets, sorts in the pull down list to just the ones that you've marked as favorites.

Lists

- Double clicking on a Business Object will cause a list of records to be displayed. This is an example of a list of Item Revision records:

- A List is comprised of 3 <u>**separate**</u> elements that work in conjunction with each other to display the records that are needed:
  - **View**
    - The view defines the <u>**columns**</u> that will be displayed.
    - Think of the columns in an Excel spreadsheet and how each one will contain unique information about the record (i.e. item, order, warehouse, etc.).
  - **Subset**
    - The subset controls the <u>**rows**</u> of data that will be displayed.
    - In the example above, notice that all the Item Revision records are from site 200; it is the subset that limited the rows of data to site 200.
    - A Subset is similar to a filter in Excel. The difference is that you can use multiple fields in a subset to limit the rows of data that are displayed
  - **Sort**
    - Any field, whether it's included in the view or not, can be used to sort the records in the list.

- Each field, when added to the view, will specify whether it is an 'Ascending' or 'Descending' sort of the field.
- Symbols will be added to the column headings to show which fields are being used to sort the list and whether they are ascending or descending.
- In the example below, notice that there are triangles to the right of Item, Site and Revision.
  - The triangles are pointing up which means that the sort is defined as 'Ascending' (i.e. lowest number at the top of the list). If the triangle was pointing down, the sort would be defined as 'Descending' which is helpful if you're sorting by a date field and want the latest date at the top of the list.
  - There is also a number next to each triangle. This defines the sequence that the fields are used to sort. In this example, Item number is the first field used, Site is the second and Revision is the third.
- *NOTE: the View, Subset & Sort are all independent of each other. Even if you give a view & subset the same name, there is no link between them. You can use any view with any subset and/or sort.*

List Header Bar

- There are new Net-Link functions that are part of the header bar in a list.

- Use the 'Grid Settings' button ⊞ at the far right of the header bar to open fields for easy searches of the data in the list by selecting 'Show Filter Row'.
- When you click on the button, check 'Show Filer Row' and the Header Bar will be expanded with field entries that you can use to filter the records in the list.

- With the filter row displayed, notice that there is a symbol next to each field that can be used as a filter. If you click on the symbol, a pull down list of options for that field will be displayed:
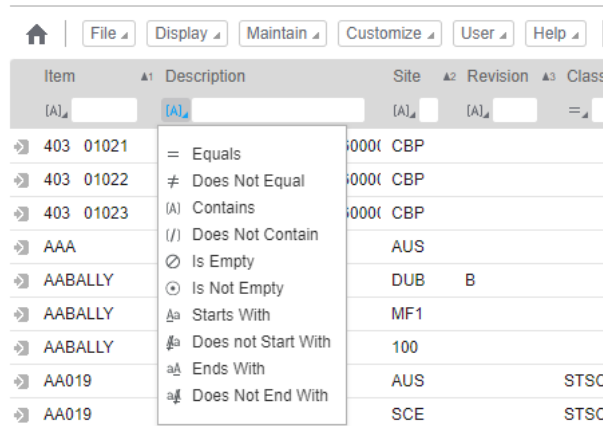
- Also, if you click on the 'Grid Settings' button ⊞ after you've expanded the Header Bar, you can change the View, Subset & Sort with the drop down window that will be displayed:
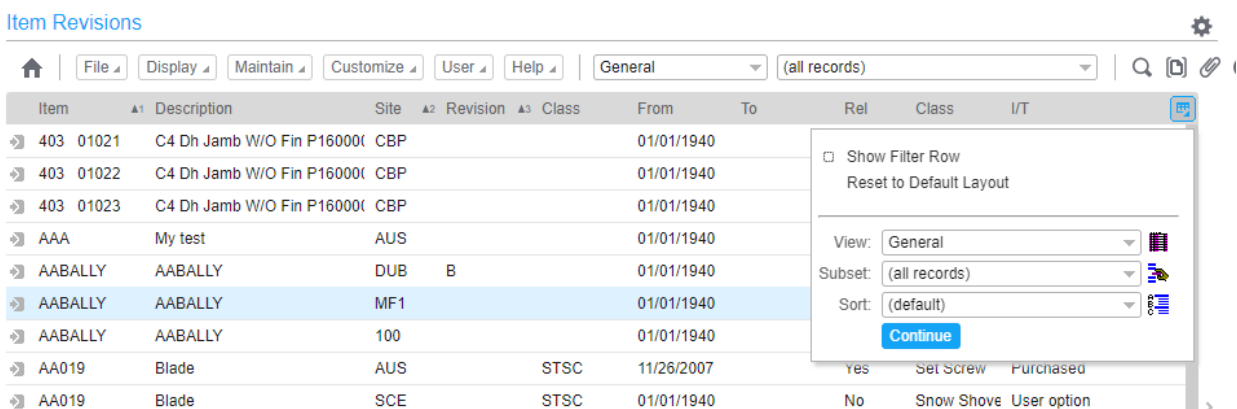
- Another feature of the Header Bar is that you can right click on a heading and perform a number of functions:
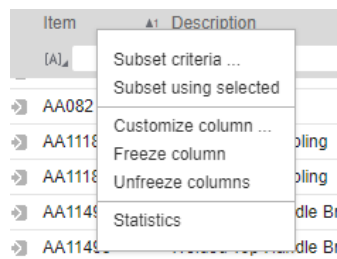
Function	Description
Subset Criteria	Create a Temporary subset to bring up just the records that you're looking for in the column that you selected. (See more information in the Subset section of this document)

Subset using selected	Same as 'Subset Criteria' above except if you single click on an item or multiple items, it will bring up the subset for those items
Customize column	Allows you to change the definitions for the column: Heading, number of decimals, scheme, etc.
Freeze/Unfreeze columns	Freezing a column will keep that column in place when you scroll to the right on the data. If you've defined a freeze in the View then you can unfreeze the column temporarily
Statistics	See the number of records (Count) for alpha-numeric fields, or, for numeric fields: count, total, average, minimum or maximum

- Looking at the task bar for the list will provide information about the list:
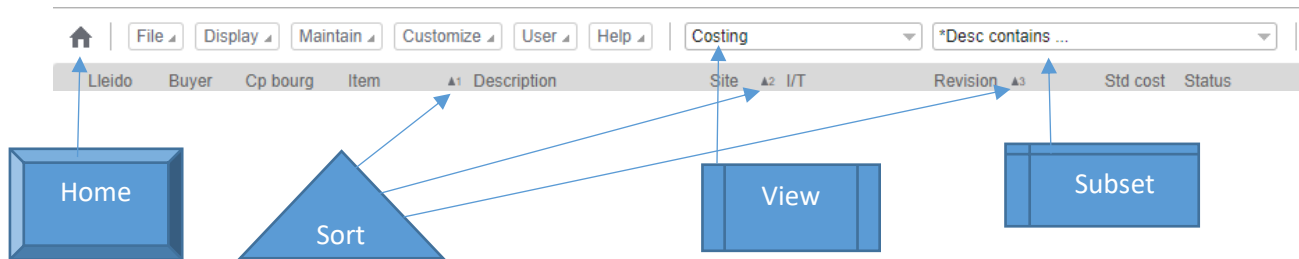
- The **Home** button is used to close the list and return to the main Net-Link card file.

Apply an existing View or Subset

- For any Views or Subsets that have been previously created, if you use the pull down box on the View (in this example) you can select a different View. Then, click on 'File' and 'Refresh' (or press the F5 key) to apply the new View to the list:
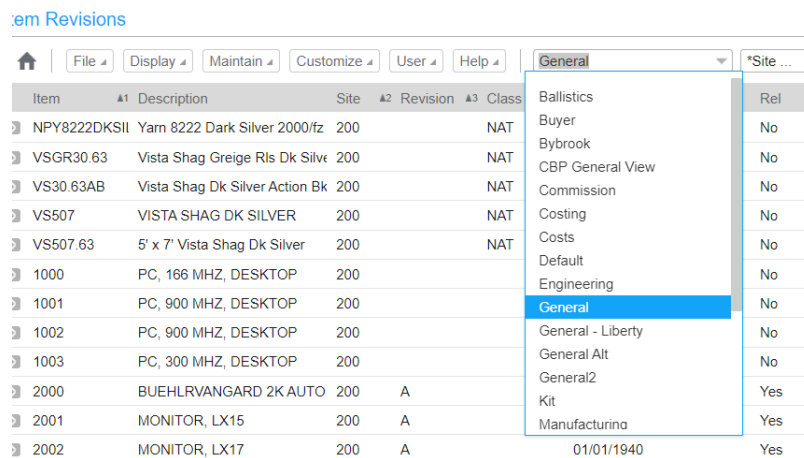
Apply a different Sort

- To apply a different Sort to the list, click on 'Customize' then select 'Sort' from the pull down list:
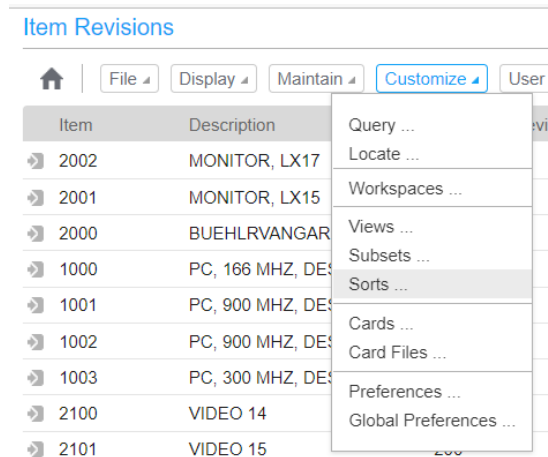
- The list of existing Sorts will be displayed.
  - Select the Sort to be used.
    - NOTE: if you hover over the sort name, a pop up window will be displayed showing the fields that are being used for the sort
    - After the Sort to be used is selected, click on the 'Apply' button   .
      - NOTE: the 'Continue' button at the bottom of the window **WILL NOT** apply the sort to the list.   It will return you to the list.
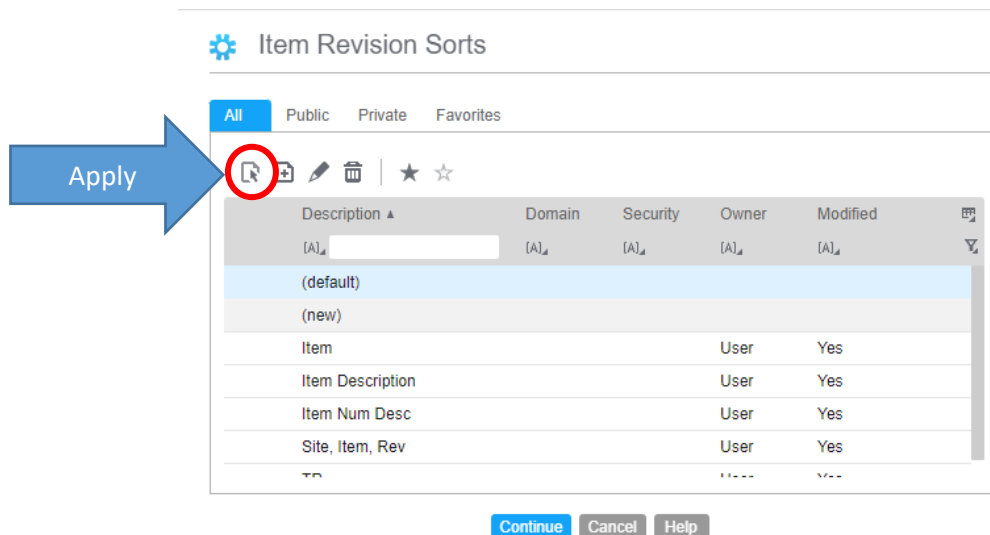
- Screen above shown with Filter Row displayed to search for sort by name.

Customize a View (i.e. Create a new view)

- To create a new view, click on 'Customize' then select 'Views' from the pull down list that is displayed:
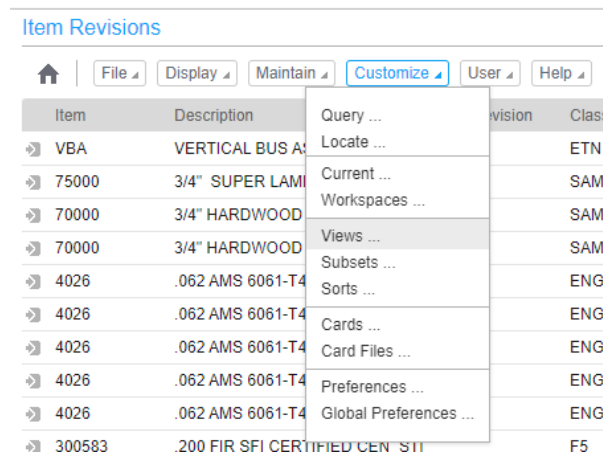
- A list of the existing Views will be displayed.
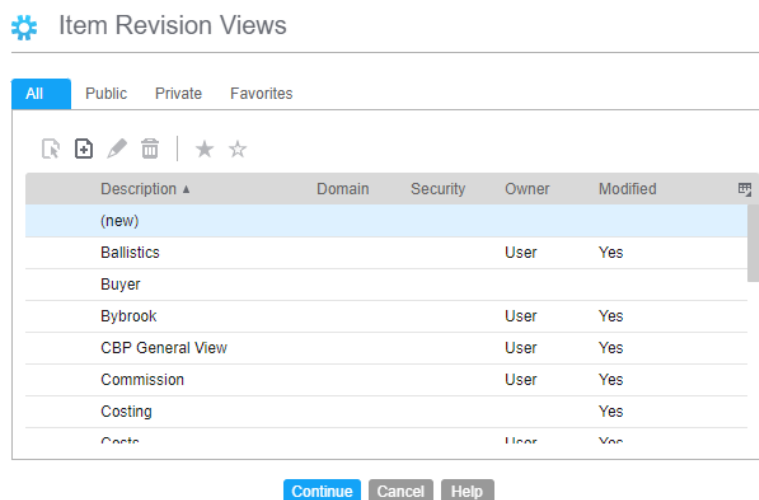
  - o To create a completely new view, click on (new) at the top of the list of existing views.
  - o To create a new view by copying an existing view, click on the existing view.

    - ▪ After selecting the (new) or existing view, Use the 'New' button to create a new view (i.e. columns of data for the list).

- The following will be displayed:

List of fields available to be selected for view.

Fields that are in the view. When creating (new), key fields are shown.

If beginning with an existing view, the fields in that view will be displayed.

Header Info

Header fields

Field	Description/Options
Name	Name of the View, if you want to save it and use it again. You can apply a temporary view without saving if it's a one time use. • *NOTE: when naming a view, subset, etc. be aware that if the first character of the name is NOT capitalized then the view will be shown at the bottom of the list when you use the pull down to apply your view. A capitalized letter has a higher priority than a lower case letter when displaying the list of views, subsets, etc.*
Domain	Public – anyone in the Company can see and use the view Private – only you can see and use the view Public with security – only people in the security group can see and use the view
Security	A 'Group' name (that is created by IT) that limits who can see or use the view. For example, if a view that contains cost information is limited to the Accounting department, IT would create a 'ACCT' group and add the people in Accounting who could see and use the View.
Presentation Scheme	Can create highlights and/or different colors based on specific criteria for the records that are displayed in the View. (Works similar to conditional formatting in Excel.)

	For example, if Make Items were to be displayed in Green, a Presentation Scheme based on Item Type could identify the items and establish the color of the font when displaying items in the View.
	A scheme entered in this field will change the entire line. There is also an option at the field level for the scheme for a field within a view.

Selecting Fields (Available Attributes)

Header Bar

The header bar shows the following information:

Field	Description
Description	Field name (i.e. Item, Unit Cost Default, Stocking UM, etc.)
Relationship	The record that has a 'relationship' defined in Integrator that links the 2 records. For example, an Item has a relationship with the Buyer file so that the Buyer's name can be included in the view. If the relationship column is blank then that means that the field is coming from the file you opened (i.e. double clicked on) to begin working on the view.
Object	The name of the Business object that holds the field
Name	The field name as it is defined in the record. Typically used by programmers.
Length	Number of characters in the field.
Data Type	**Numeric** – only numbers allowed in the field. **Character** – alpha/numeric field. **Boolean** – yes/no fields.

	Date
	Time

- Click on any of the Header Bar fields to change the sort sequence of the Available Attributes

- Use the 'Grid Settings' button ⊞ at the far right side of the Header bar and select 'Show Filter Row' to expand the search options. This works similarly to filters in Excel.

Available attributes

Description	Relationship	Object ▲	Name	Length	Data type	⊞
[A]▴	[A]▴	[A]▴	[A]▴	=▴	[A]▴	⊽▴

- For example, if you were to key the word 'Item' in the Description field, then only fields that have 'Item' in their description would be displayed:

Available attributes

Limit to attributes of View: (none)

Description ▲	Relationship	Object	Name	Length	Data type
[A]▴ Item	[A]▴	[A]▴	[A]▴	=▴	[A]▴
Allow multiple items on a P.O.	Vendor	Vendor	mlpovm	1	Boolean
Alternate item	Item, Item Extension	Item Extension	b2oemn	22	Character
Alternate item		Item Revision	oemnad	22	Character
Alternate item	Current Item Revision	Item Revision	oemnad	22	Character
Configured item code		Item Revision	cnfiad	1	Character
Configured item code	Current Item Revision	Item Revision	cnfiad	1	Character
Item	Current Item Revision, Current Primary Item F	Item Process	itnoc1	15	Character
Item	Current Item Revision, Current Base Price	Item Revision Base Price	itnono	15	Character
Item	Current Item Revision, Item Revision Cost	Item Revision Cost	itnoal	15	Character

Add a field to a View

- Find the field that you want in the list of 'Available Attributes' and then double click on it to add to the 'Selected Columns'
- If a field in the 'Selected Columns' is highlighted, it will insert the new field after the highlighted field.
- If there is no field highlighted in 'Selected Columns' then it will drop the field at the bottom of the list.
- There will be a 'Column Details' window that is displayed on the right side of the screen that will ask for the following:

Field	Description
Column Heading	The text that will display at the top of the column when the View is used. This defaults to the description of the field but can be changed.
Content	There are 3 choices for fields that have a description associated with them (Item Type, Item Class, etc.): **Value** – the code (i.e. Item Type values would be 0, 1, 2, 3, 4, 9) **Alias** – the description (i.e. phantom, assembly, etc.) **Both** – both the Value & the Alias display
Presentation Width	Width of the field to be displayed. Defaults to the field size but can be changed to a smaller size to allow for more fields to be shown on the screen.
Mixed Case	Show the field in both upper & lower characters
Column Statistics	For Character fields, record 'Count' is the only option. For Numeric fields, Count, Total, Average, Minimum or Maximum can be selected
Scheme	Highlight the field using a presentation scheme

- For fields that are defined as numeric, you can change the number of decimal places to be displayed. This does NOT change the value in the record only what's shown on the list.
- In the example below, Unit Cost Default (UCD) column/field has 8 characters to the right of the decimal but we're only displaying 4 characters.

Freeze Column

- There is an option to freeze a column so that if you scroll columns prior to the frozen one will remain on the screen.
- Single click on the field that you want to freeze (in the example below, it's 'Item') and click on the 'Freeze Column' ⊞ button.

- It will show as a line in the view:

- When displaying the list using the view, the 'Freeze Column' will display as a solid line:

Presentation Schemes for the view or a field

- o Presentation Schemes in the view are similar to conditional formatting in Excel.
- o If there is a specific value or group of values that you want to highlight or show in a different color, create a Presentation Scheme to include in the view.
- o In the example below, all Item Revisions in site AUS have a background color

- If the Scheme is added to the header of the view, it will apply to the entire line as in the example above.

- If the Scheme is added to a specific field, it will only display in that field.

Create a Presentation Scheme

- To create a Presentation Scheme, click on the button to the far right of the 'Scheme' field.
- A list of existing schemes for that file will be displayed:

- To create a new scheme either
  - Double click on (new) at the top of the list or

- o   Single click on (new) and click on the Add button

- A 'Presentation Criteria' window will be displayed. Click on the 'Add' button to open the pop up window:
    - o   One Scheme can include multiple criteria.
    - o   As an example, let's say that there's a subset in Customer Orders and a list needs to be created to show Shipping all the CO's that are scheduled to ship in the next 2 weeks including past due orders.
        - ▪ If the order is past due, it needs to be displayed in red.
        - ▪ If the order is scheduled to ship in the next week it needs to be displayed in green.
        - ▪ If the Manufacturing Order Due date is beyond 1 week, display the order in blue.
        - ▪ This would be created as a single Presentation Scheme with multiple criteria.

- In the Presentation Criteria example, shown below, I'm going to use the 'Item Type' field to display make items (Item Type = 0, 1 or 2) in blue and purchased items (Item Type = 3, 4 or 9) in green:
    - o   Select the field to be used from the 'Available Attributes":

- Then use the 'Options' tab (above 'Available Attributes) to select:
  - **Color** for Foreground (changes the color of the letters & numbers) or Background (highlights the line)
  - **Font Style**
    - Regular (default)
    - Bold
    - Italic
    - Bold & Italic
  - **Attribute text** (if available) & Icon
- Be sure to give the Presentation Criteria a descriptive name, then click the 'Continue' button.
- Give the Presentation Scheme a name (can be the same as the Criteria Name) and save the scheme.
- At this point the Scheme can be selected for either a field or view.

- Be sure that the 'Scheme' column is showing the correct sample (above).
- Finished View sample with criteria on the Item Type field:

Customize a Subset

- A Subset is similar to a filter in Excel except that you can use multiple fields in a subset statement to limit the number of records that are displayed in the List.
- Locating the fields to use in the subset works exactly the same way as described in the 'View' section of this document.
- To begin creating a subset from the list that you're working in (in this example, it will be the Item Revision file), click on 'Customize' then select 'Subsets' from the pull down list:
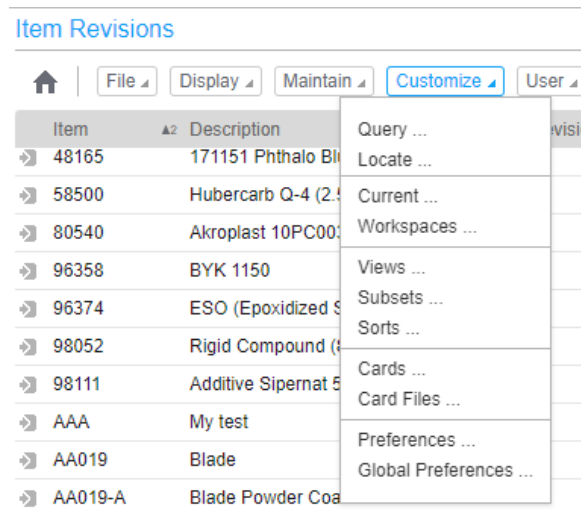
- A list of existing subsets will be displayed:
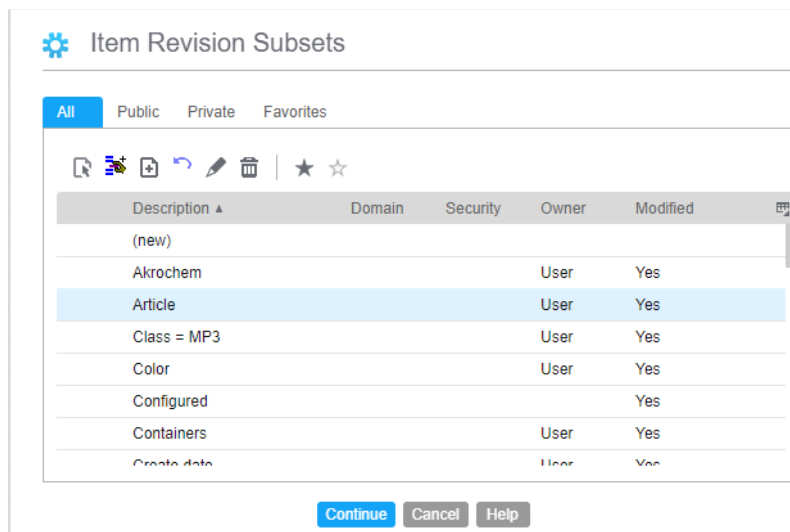
- To start a new subset, double click on (new) at the top of the list.
- To create a new subset based on an existing subset, single click on the existing subset then click on the New button

- The following window will be displayed:

- Use the 'Grid Settings' button and select the 'Show Filter Option' to maximize the search options in the 'Available Attributes' section:

- Double click on the field that you want to add to the subset.
  - It will display in the 'Selected Criteria' section of the window with options on the far right side.

Field	Description

Relational Operator	Select the option to use for this field. Applies to the data entered in the 'Value' field.
	Equality
	  Equal
	  Not Equal
	Inequality
	  Less than
	  Less than or equal
	  Greater than
	  Greater than or equal
	Containment
	  Contains
	  Does not contain
	  Begins with
	  Does not begin with
	  Ends with
	  Does not end with

Operand Type	**Constant Value** = one value for the field selected (in this example, the field is 'Site' and you would enter one Site ID in the Value field **List** = allows for multiple values to be entered for the field **Field Value =** can use a different field **Range** = From/to values can be entered. For date fields, can select last, current or next week, month, quarter or year.
Value	Key the field value you are searching for

	Prompt for value = causes a pop up window to be displayed to allow entry of the value each time the subset is applied **Preference** = Uses the value from your Preferences (see 'Preferences' section later in this document).

Changes based on Operand Type:

- List:

- Key in the value or use the pull down list to select a value
- Click the 'Add' button to add to the list
- Range (when using a date field)

- Range – pull down option for last, current, next. Options for Year, Quarter, Month, Week.

- o If 'Specific Range' is selected, then From/To fields apply.
  - o The advantage to using these options is that each night, when the date on the server changes, the subset will be updated.   If you manually enter specific dates, then you will need to update the subset as the dates need to be changed.
- From/To options
  - o Specific date
    - Manually enter a date
  - o Calculated date
    - Start with 'Today' and either Add or Subtract x number (you enter this number) of days, weeks, months or years.
  - o Anniversary
    - Same date for prior years.
  - o Prompt for value
    - Causes a pop up window to be displayed each time the subset is applied.
    - NOTE: you can enter a value in either or both from/to specific date fields and check 'Prompt for value' to have default dates in the pop up window.
- Example with 'Prompt for value' checked:

- Give the Subset a name and click the 'Save' button.   You will be returned to the list of subsets.

- Click the 'Apply' button   to apply the subset to the list.

Customize a Sort

- Sorts define how the list is sorted and also, when you use the 'Locate' button, how to jump to a record in the list.
- Any field or combination of fields can be used to sort the list.
- The fields used for sorting **do not** have to be included in the View.
- To create a new sort, click on the 'Customize' button then select 'Sorts' from the pull down list:
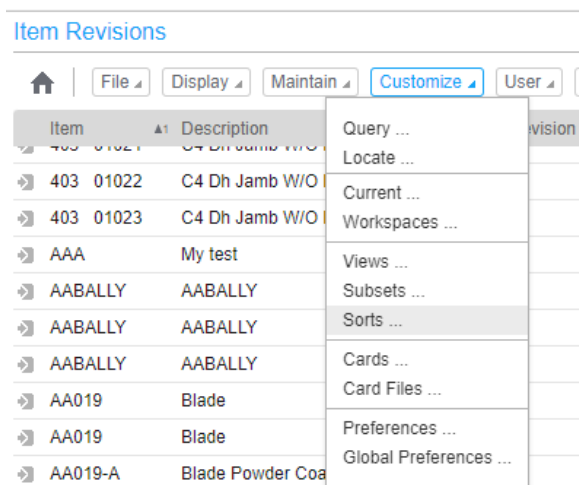
- A list of existing sorts will be displayed:
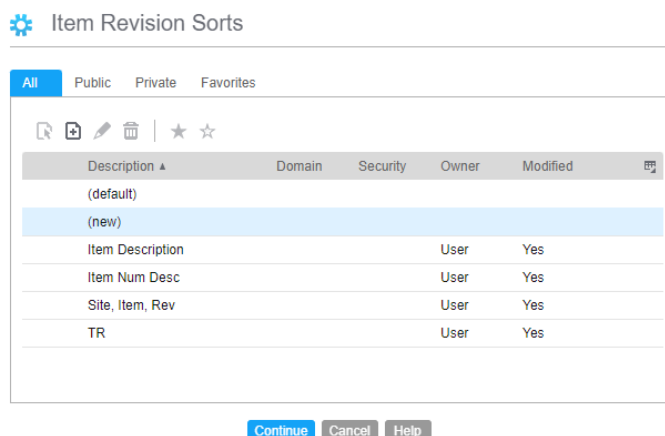
- To create a new sort, double click on the (new) option at the top of the list.
- The window like the one described in the 'List' section of this document will be displayed:

Available attributes

Description ▲	Relationship	Object	Name	Length	Data type
[A]◢	[A]◢	[A]◢	[A]◢	=◢	[A]◢
10 Character		Item Revision	id10ad	10	Character
10 Character	Current Item Revision	Item Revision	id10ad	10	Character
1099 recipient (derived)	Vendor, Vendor Extension	Vendor Extension	r109j5	1	Boolean
20 Characters		Item Revision	id20ad	20	Character
20 Characters	Current Item Revision	Item Revision	id20ad	20	Character
Abbreviation	Vendor	Vendor	vnmavm	10	Character
Account number	Current Item Revision, Item Revision Purchas	Item Revision Purchase	acctaw	15	Character
Account number	Item Revision Purchase	Item Revision Purchase	acctaw	15	Character
Account number	Item, Item Purchase	Item Purchase	accti2	15	Character
Accounting entity		Item Revision	aeidad	128	Character
Accounting entity	Current Item Revision	Item Revision	aeidad	128	Character

Selected order

Description	Relationship	Object	Sort seque...	Subtotals	Name	Length	D

- Locate the field to be added to the sort, double click on the field and it will be added to the 'Selected Order' section (on the bottom of the screen) with the options showing on the right side of the window:

- Select 'Ascending' or 'Descending' for the sort.
- The other options are used for exporting the list to excel with 'Control' options (line spaces, headings, etc.)
  - Most companies export to Excel and insert/change headings/create sub-totals in Excel instead of using these features in Net-Link.

- Fields used for sorting, if they are included in the View, will have a triangle next to them pointing up for Ascending or down for Descending.   There will also be a number displayed to show the sequence that the fields will be used to sort:

- If using the 'Search' button only the fields used to sort the list will be displayed:

Setting Favorites

- The pull down list of existing views, subsets, sorts can get extremely long, so long that you have to use a scroll bar to see all of the names.
- By selecting the ones that you use most often by flagging them as favorites, the pull down list will only display your favorites.   It will also include a link at the bottom of the list to see and use all definitions.
- Pull down list of views before setting favorites (notice the scroll bar):
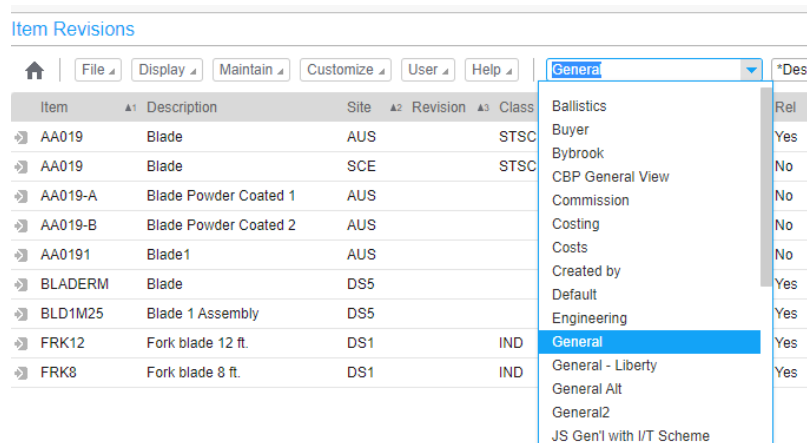
- Use the 'Customize' option for each function to open the list of existing definitions:
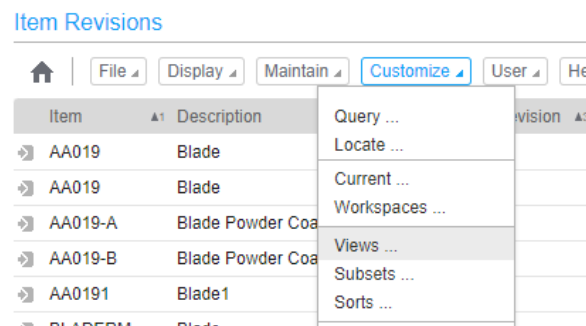
- Single click on the definitions that you want to mark as your favorites.

- Click on the 'Favorites' button ⭐ . A star will appear next to your favorites:
- When you pull down the list of views to select, only your favorites will be displayed:

- Use '(all definitions)' to apply a view that is NOT marked as a favorite.

Card Files

- When you double click on a record in a list, Net-Link will open a Card File to show details about that record (item, order, etc.).
- The Card File controls what tabs (Cards) are displayed.
- In the example below, the 'Default' card file is being used with the following tabs/cards:
    - General
    - Engineering
    - Procurement
    - Inventory
    - Sales
    - Costs
    - Translations

- When you change Card Files, the cards/tabs will also change:

- After creating a new card, **it must be added to a card file** to see the card.
- To create or change a card file, click on 'Customize' then select 'Card Files':
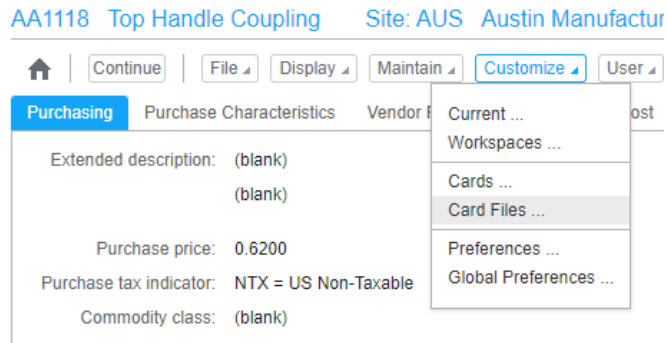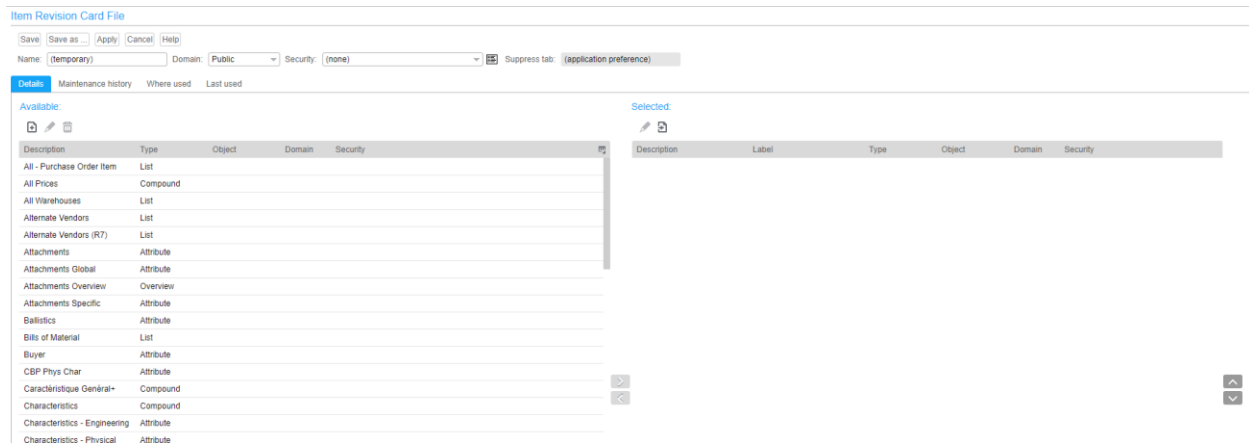
- The list of existing card files will be displayed:
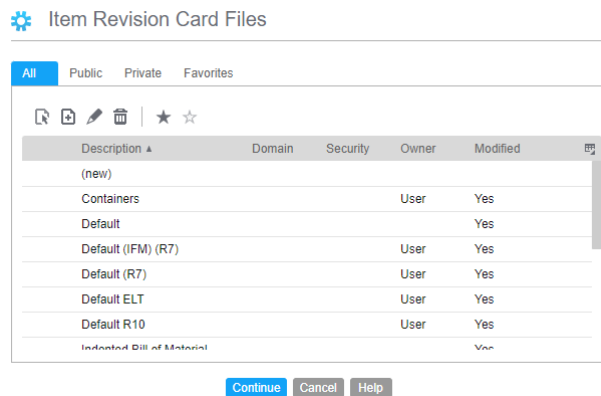
- To create a new card file, double click on (new) at the top of the list. The following window will be displayed:

- Cards that can be added to the Card File are shown on the left side of the screen.
- Cards that are included in the Card File are shown on the right side of the screen.
- To add a card either double click on the card or single click and click on the top arrow button between the available and selected card sections.

- It will be shown in the 'Selected' section and the 'Label' (i.e. tab name) can be changed:

Selected:

Description	Label	Type	Object	Domain	Security
General	General	Compound			

- The 'Label' is the name that will be displayed on the card tab.   You can change the 'Label' to whatever name is appropriate for your company.
- To change the sequence that the tabs are displayed, use the up/down arrows on the far right side of the screen to move the cards so that they are in the correct sequence.

Cards

- Cards are the different tabs that are shown when you double click to open a record in a list.
  - The Card File defines the cards that will be displayed.
- Net-Link has 7 different types of cards.   When you create a new card, it will ask first for the type of card to create.
- The supporting screens that you will see will differ depending on the card type selected.

Create a new card

- To create a new card, click on 'Customize' then select 'Cards' from the pull down window
- A list of existing cards will be displayed along with their 'Card Type'.

- You can single click on an existing card then click the 'New' button . This will copy the definition of the existing card to the new card and allow you to make changes and/or additions.
- To start with a new card, double click on '(new)' or single click on '(new)' and click on the 'New' button.
  - Select a 'Card Type' for the new card:

- Each card type is described below:

Attribute

- An attribute card holds fields from the record.   These can be grouped by functional area.
- There are options to add blank lines, headings and column breaks.
- Creating an Attribute card is similar to creating a view.   When adding a field, 'Card Attribute' and 'Presentation Options' are displayed:

Field	Description
Card Attribute	
Label	Name that will appear on the card tab.
Presentation Options	
Display value in mixed case	If the field is created with upper & lower case letters, option to show the field in both cases.
Number of Indents	Indent the field on the card.
Content	**Value** – code that is in the record. **Alias** – description of the code. **Both** – both code & description.
Visual Control	Open the field for maintenance or display contents only.
Entry field width	Width of the field to display in maintenance.

- Buttons have been added to the toolbar under the 'Selected Attributes':

Button	Description

	Move field up or down on the card.
	Delete field from the card.
	Start a new column on the card.
	Append a column on the card.
	Add a 'constant' which can be a blank line or a heading to a label or data column.
	Based on.

- Consider the following 'Selected Attributes':

- To add a blank line, use the 'Add Constant' button

- To add a heading to a group of fields, use the 'Add Constant' button .
    - Key the text you want to display on the card and select whether you want it to appear over the Field Names (Label Column) or Data (Data Column)

- To start a new column, click on the 'Add Column' button

- To add a field to the right of the existing column, use the 'Append Column' button
- Here is the attribute card definition with the above options included:

Selected attributes

Description	Relationship	Object	Label	Indents
Site		Item Revision	Site	0
Item		Item Revision	Item	0
Description		Item Revision	Description	0
Stocking UM		Item Revision	Stocking UM	0
<blank line>				0
<label constant>			Class Codes	0
Item accounting class		Item Revision	Item accounting cla	1
Item class		Item Revision	Item class	1
Item price class	Current Base Price	Item Revision Base F	Item price class	1
Value class		Item Revision	Value class	1
<column break>				
Standard unit cost	Item Revision Cost	Item Revision Cost	Standard unit cost	0
Standard material	Item Revision Cost	Item Revision Cost	Standard material	0
Standard run labor	Item Revision Cost	Item Revision Cost	Standard run labor	0
Standard manufacturir	Item Revision Cost	Item Revision Cost	Standard manufac	0
<column append>				
Current unit cost	Item Revision Cost	Item Revision Cost	Current unit cost	0

- Here is the card that uses that definition:

Compound

- A compound card is a card that can have 2, 3 or 4 sections, with each section containing it's own information.   It is similar to defining a PowerPoint slide.
- Each section can be defined when creating the card or an existing card can be add to the section.
- When creating a compound card, a 'Form Layout' will be displayed.
    - The first thing to do is to decide on the number of sections and how you want those sections to be displayed:

- Once the number of sections is and layout is selected, the 'Form Layout' will display the sections for you to define what data you would like to see.   Here is a 4 section card layout:

- A sample of a single section:

Field	Description
Title	Title of the section which should represent the contents
Include Title Border	When displaying the card, check the box if you want the title to be displayed
Contents	Pull down option to show a list of previously defined sections for the object.
Include cards in list	Check the box if you want to include existing cards in the 'Contents' list. *NOTE: You may find it easier to define each card that you want in a section and then add that card to the section as opposed to creating a separate section for each piece of information. This is especially true if you want multiple tabs, you can add a tabbed card to the section and get*
Link Subset with section	Assign a subset to the section. For example, if the section was for PO Items you may not want to include received and cancelled line items on the PO. You can create a subset based on PO Item Status and only show open lines.
Initial size	Set the Length and Width for the section of the card. This can be moved when the card is open.

- To create a section definition, click on the 'File Folder' button ⌗ to the right of 'Contents', then click on the 'New' button ⌗ .
    - o You will be asked what kind of section do you want to create:
        - ▪ Attribute
        - ▪ Graph
        - ▪ List
        - ▪ Overview
- Creating an attribute section is the same as creating a view in a list
- See Graph card for instructions on how to create a graph
- Current cost sample with 4 sections: Attribute, Graph & List
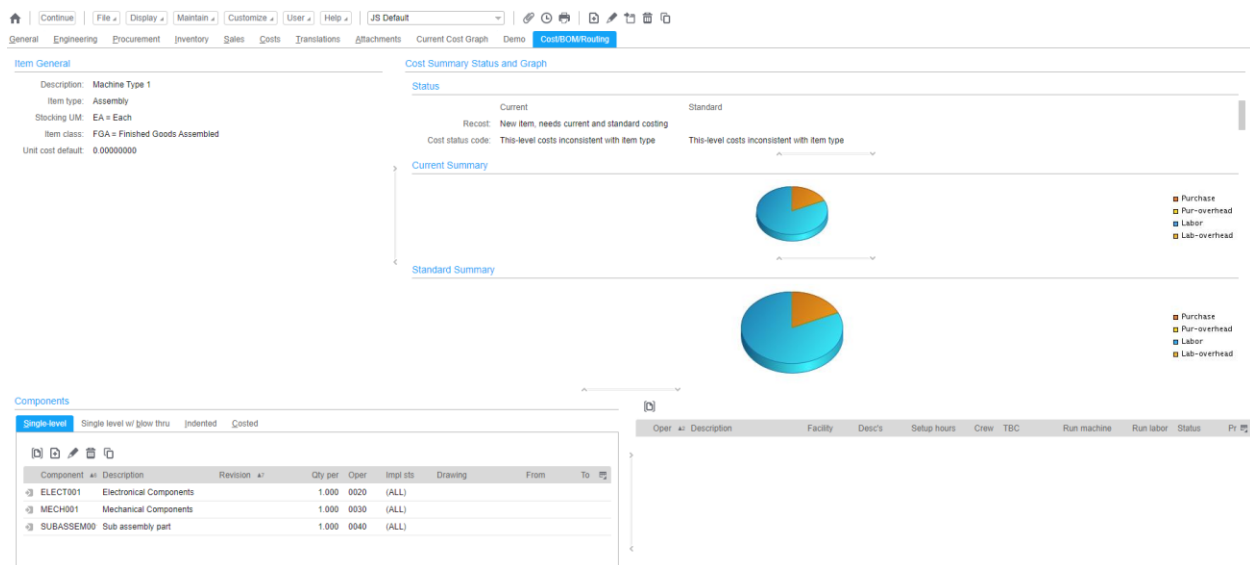
Graph

- ▪ A graph card is used to display a group of numbers in graphical format. It is most commonly used for cost cards.
- ▪ The graph can be bar, line, pie or 3D.
- ▪ Defining the card:
    - o Select the fields to be graphed (similar to selecting fields for a view)

Item Revision Graph Card

Field	Description
Name	Graph card name.
Tab Label	Text that appears on the card tab. This can be different from the card name.
Graph Type	Select the type of graph for the card; can be changed after the card is created: Bar Horizontal Bar Line Pie Stacked Bar Horizontal stacked bar Stacked line
Presentation (bottom)	
Label Message/Series Label	Labels define the data. Use this field to insert a message on the card in place of the objects being graphed

Sample labels	Where should the labels defining the elements of the graph be displayed (none) i.e. do not display labels Floating – display the label when you hover your mouse over the data Below – beneath the data Floating & below – both option
Legend Position	Each data element will be displayed with a different color. Where do you want the legend for color & description to be displayed. Options are: (none), top, bottom, left, right.
3D mode	Display the graph in 3D
Value Labels	Where do you want the number that is represented by the graph to be displayed. In this case, it will be the individual standard cost elements.
Percent labels	If the field is a percentage, how do you want the label to read?
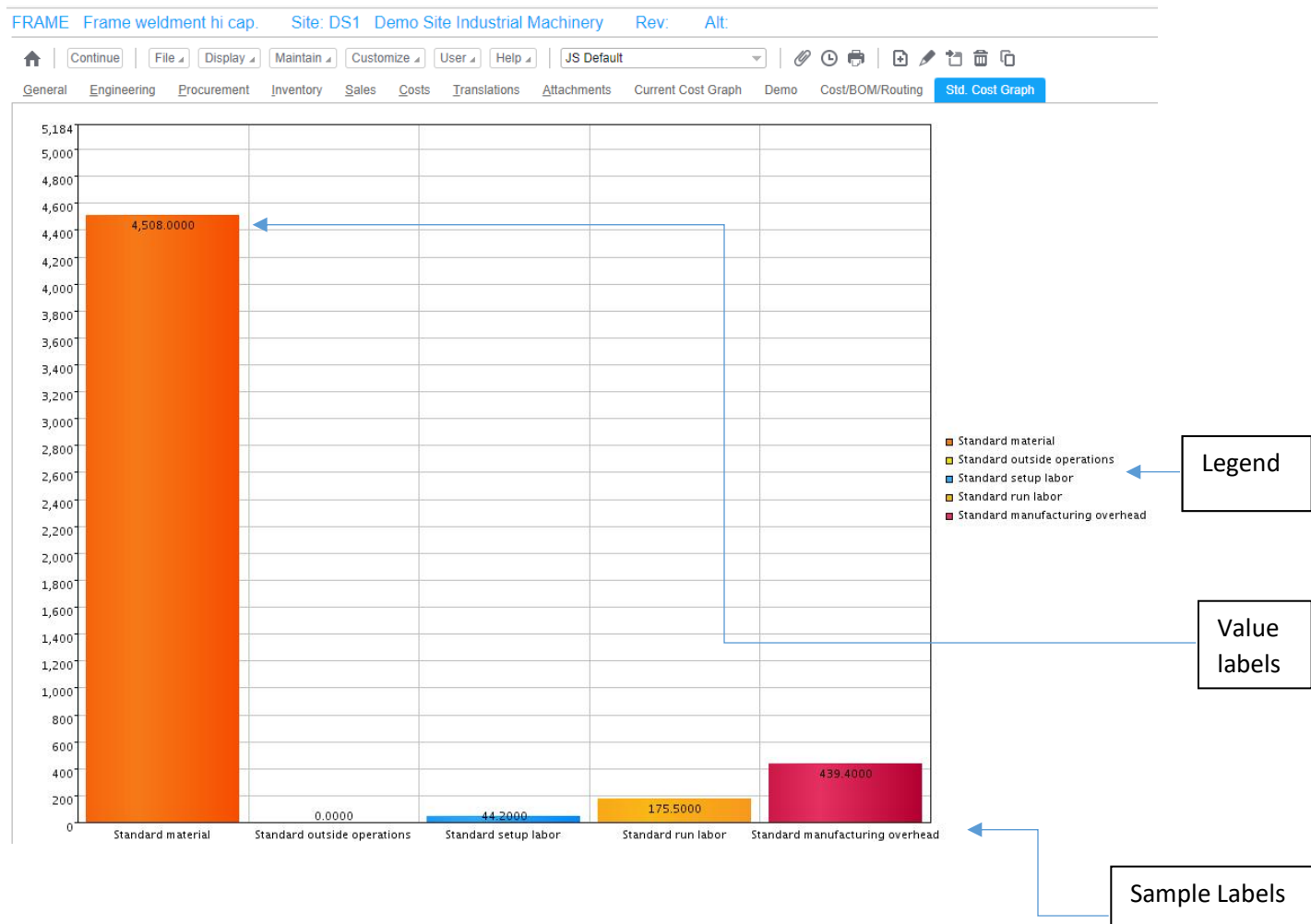
List

- A list card is like an object's list.   It is controlled by a view, subset and sort.

- There must be a relationship to another file to create a list card.   For example, the Item Warehouse file must have a relationship defined (either by Infor or your IT department) to the Transaction History file. Then, you can create a list card in the Item Warehouse file with Item Transaction History.

Item Warehouse List Card

| Save | Save as ... | Apply | Cancel | Help |

Name: (temporary)   Domain: Public   Security: (none)   Tab label: (same as name)

Details   Maintenance history   Where used   Last used

List options

Contents: C.O. Line Item Kit Component Releases

View: General

Subset: (all records)

Sort: (default)

Restricted by subset: (all records)

Header message:

Footer message:

Detail options

Initial card file: (preference)

Initial card: (preference)

Default open action: (preference)

Default <Alt> open action: (preference)

Default <Ctrl> open action: (preference)

Default create template: (preference)

Default copy template: (preference)

Default change template: (preference)

Toolbar   Edit

Field	Description
List Options	
Contents	Defines the file that you want the list for. This will change depending on the file that you're beginning with (in this example 'Item Warehouse': C.O. Line Item Kit Component Releases Item Warehouse Customer Orders Item Warehouse Discrete Allocations In-transit Scheduled Receipts Item Warehouse Transaction History Item Warehouse Production Lines Item Warehouse Locations Item Warehouse M.O. Components Item Warehouse Manufacturing Order History Manufacturing Order History Where-Used Item Warehouse MRP Recommendations Item Warehouse Purchase Orders Item Warehouse Purchase Order History Production Where-Used Item Warehouse Production Receipts
View	Name of the view to be used on the card
Subset	Name of the subset to be used on the card. NOTE: The subset will only be for the item, order, etc. that you are beginning with.
Sort	Sort sequence for the records in the list
Restricted by Subset	If a subset name is entered here, the subset on the card cannot be changed nor can a temporary subset be used.
Header Message	Message that will be displayed at the top of the card.
Footer Message	Message that will be displayed at the bottom of the card.
Detail Options	
Initial Card File	When double clicking on a record in the card, what card file should be used to display the detail.
Initial Card	In the card file, which card should be the 'active' card when opening the card file.
Default open action	When double clicking on a record in the card, should the record open in an inquiry mode? Change mode? Etc.
Dflt <ALT> open	Holding down the 'ALT' key when double clicking, define how the record should open.
DFlt <CMD> open	Holding down the 'CMD' key when double clicking, define how the record should open.

Dflt Create Template	If there is an 'Add'/'Create'/'New' button [icon] on the card, what template should be displayed when clicking on the button.
Dflt Copy template	Default 'copy' template if clicking on the 'Copy' button [icon] on the card
Dflt Change Template	Default 'Change' template if clicking on the 'Change' button [icon] on the card

Overview

- An 'Overview' card displays all the information about the record (MO, PO, etc.) but does not allow for maintenance of the record; i.e. no create, change, delete options. It will show all information in the hierarchy associated with the parent item.

- Sample Indented BOM Overview card:

- o For example, an indented BOM is an overview card that shows all levels of a bill.
- o Another example would be a PO overview which could show PO header, vendor, line items, line item releases, messages and miscellaneous charges.
- When you see a ▶ sign on the left side of the data, then that means that there is more information at a lower level. Single click on the ▶ button and the data will be displayed under the line. The triangle will point down ▼ when the lower level data is displayed.
- o There is a setting in the card to specify the number of levels that should open automatically when the card is displayed to prevent having to click on multiple + buttons to see all the data.
- o When you change an existing overview card (Maintain, Card, Overview card name), from the 'Overview' definition, click on the 'Change' button 🖉

- 'Initial Expand Levels' controls the number of levels that will be open when the card data is displayed.
  - Enter a number or select 'All' to have the card open fully expanded. If you enter a number then only the records up to that level number will be opened.
- 'Power Expand Level' is an override to the 'Initial Expand Level' in that it can be set globally in the user preferences.
  - Set the 'Power Expand Level' to 'Preference' if you have changed your 'Global Preference Setting' (see below).
- Once the relationship is defined the detail data will appear on the card:

Tabbed

- A Tabbed card holds other cards.
- When you see a card with tabs either at the top, bottom or both, then the card has been defined as a 'Tabbed' card.
- When you add a Tabbed card to a section in a Compound card, the tabs are displayed in the section of the compound card.
- When you create a tabbed card, you will be presented with a list of cards to include and asked for the location of the tabs (top, bottom, etc.)

- Select the cards (from the list on the left) to be included by double clicking on their names.
  - The tab label name can be changed when the card is added to the Tabbed Card:

- Sample Inventory Tabbed card:

Templates

- When you add a new item, order, item to an order, etc. Net-Link uses Templates to bring up the fields that you require for the creation.
- These fields can be displayed on the card (prompt for value), displayed on the card with a value in the field (prompt for value and provide default value) or not displayed at all but hold a default setting/value (Do no prompt for value).
- The template also holds default settings for 'Return here to create another', 'Preview before Create', etc.
- The template can define the default card file and card to use when the record is being created with that template.

- You access Template maintenance via the 'Maintain' pull down option:

- Create Templates are the ones used most often and this document will be using the create Template as the model for discussion.
- In Item Revision create, here is the Default Template.

- And here is the definition of the same (Default) Template.

Selected attributes

Description	Relationship	Object	Label	Default value	Prompt	Cursor	Retain	Indents	Name	
Site		Item Revision	Site		Yes	No	No	0	stidad	
Item		Item Revision	Item		Yes	No	Yes	0	itnoad	
Revision		Item Revision	Revision		Yes	No	Yes	0	itrvad	
Description		Item Revision	Description		Yes	No	Yes	0	itdsad	
Serial number required		Item Revision	Serial number required	No	No	No	Yes	0	ipstad	
Kit document print option		Item Revision	Kit document print option	No	No	No	Yes	0	iqstad	
Auto sync (derived)		Item Revision	Initial release	No	Yes	No	No	0	autrad	

- When adding a new field to the template the following control panel will be displayed:
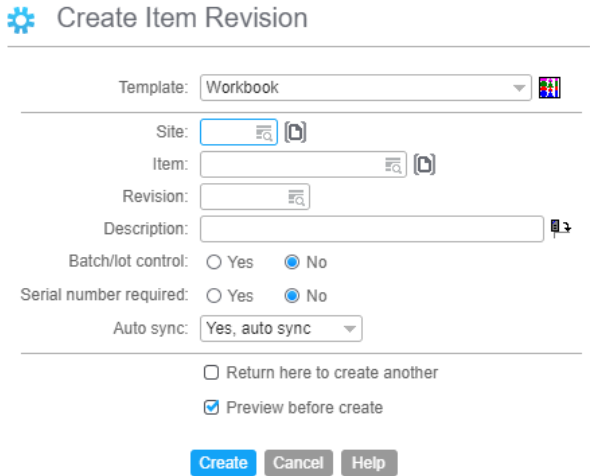
Field	Description
Usage	**Prompt for Value Only** – Display the field on the template to be completed manually by the person creating the record **Provide Default Value Only** – do not display the field on template, just populate the value for the field when creating the record **Prompt for value and provide default value** -
Update Type	**Specific** – Enter the value for the field in the Template. **Related** – Pull a field from a different file. The different file must have a relationship defined to the primary file. See your IT department for assistance if the field you need is not displayed on the list of available attributes.
Default Value	If 'Update Type' = specific, enter the default value for the field
Retain Previous Value	Check this box if you want the value entered when creating the first record to be retained when creating the second, third, etc. records
Position Cursor	Check this box to have the cursor in this field when you open the template
Number of indents	If you want the field to be indented when it's displayed on the template card, enter the number of spaces to indent
Label	Description of the field. This will default to the XA description.
Content	The content field is used if the field is predefined with both a code and a description. I'll use the Item Type as the example but this applies to Item Class, Customer Class, etc. **Value** – The code; for Item Type it would show 0, 1, 2, etc.

	Alias – The description of the code; for Item Type it would show: phantom, assembly, manufactured, fabricated, etc. **Both** – Will show both the value and the Alias; for Item Type 1 it would show '1 – Assembly'.
Visual Control	When the field is defined by XA as a yes/no type field the choices can be displayed with radio buttons, a pull down list where the response is selected. In the sample below, 'Batch/Lot Control' & 'Serial Number required' have radio buttons and 'Auto Sync' is a pull down list.
Sample Template	

Workbenches & Split Screen

- **Net-Link does NOT have or support Workbenches**. Instead, it uses a 'Split Screen' to send information from one window to another in a list or on a card.
- Split Screens can be set up in:
  - Work Spaces (see below)
  - Overview Cards (see below)
- There are some split screens that have been defined by Infor.   To display a split screen:
  - Open an object (in this example, Item Warehouses)
  - Click on the 'Gear' button ⚙ in the upper right corner of the list:

- The view will be changed to a 'Split Screen' showing the Item Warehouse Card File for the item selected (single click) and the 'Stock Overview' showing the list of locations for the item:

- To define which card/card file will be used when you click on the 'Gear' button ⚙ set the default card file & card in object 'Preferences' (see Preference section below). Use the 'Customize' option to set object preferences.

Workspace

- A Workspace allows you to add the same business object to a card and define the view, subset, sort, etc. to be used when opening that object.
  - For example, let's assume that your company has 3 warehouses. Instead of having 1 business object for 'Item Warehouses' you can create 3 separate objects and have a subset for each that identifies one of the warehouses. When you double click on the business object with the Workspace, it will only display the Item Warehouse records for that single warehouse.
- The Workspace can also define the card file to use when double clicking on a record in the list in addition to specifying which card should be the active card.
- Here's a card before adding workspaces:
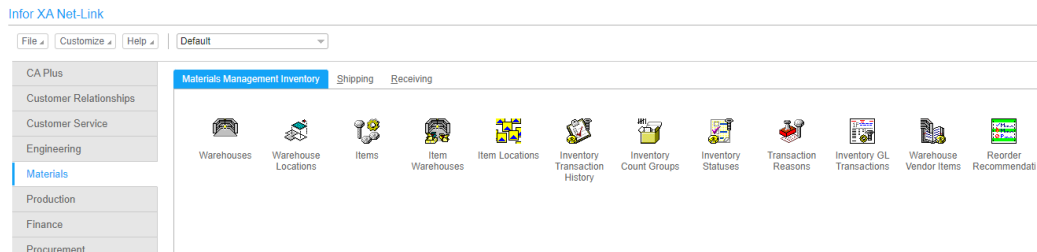
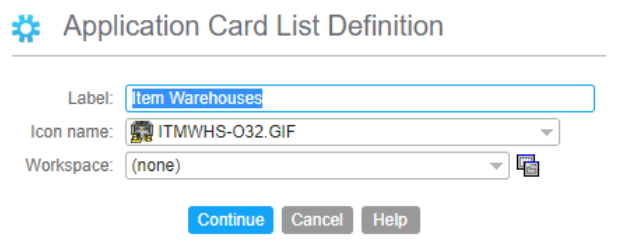- To add a Workspace, click on 'Customize' then 'Cards':
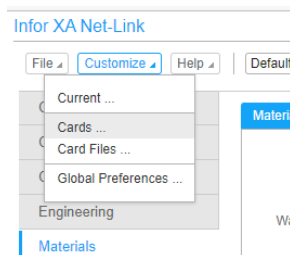
- The active card will appear highlighted on the list of cards:
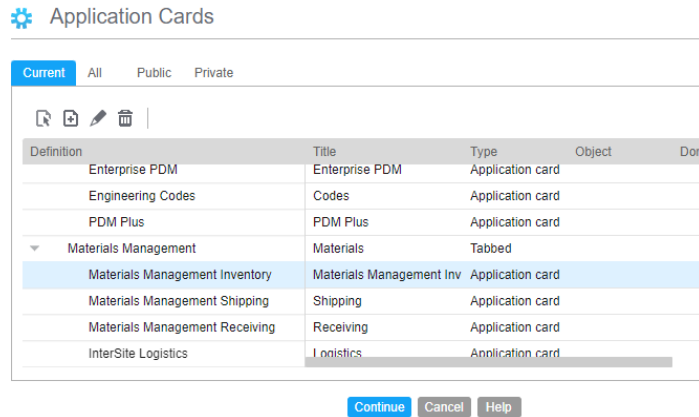
- Double click on the card or click on the 'Change' button to change the card.
    - In the example below, you'll notice that I highlighted the 'Item Warehouse' object with a single click so that new objects that I add will drop immediately under the 'Item Warehouse' object.
    - The list of available objects will show on the left side and the objects that are on the card will appear on the right side:
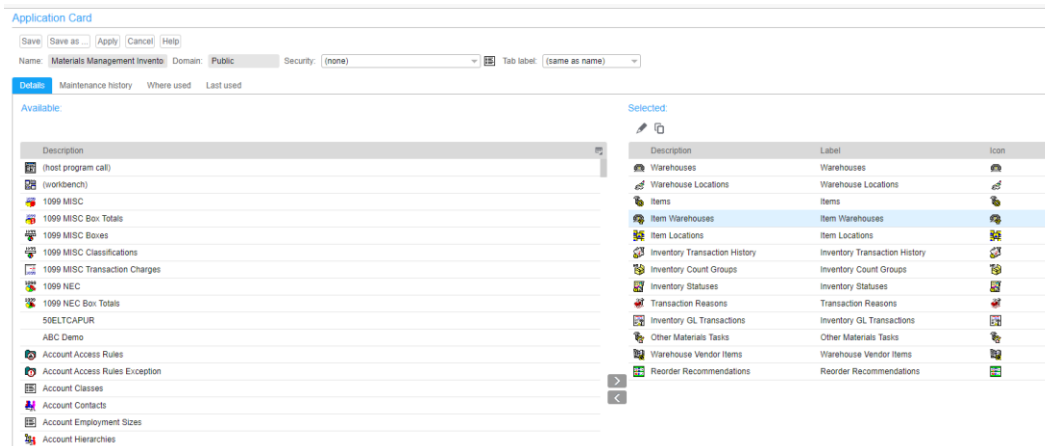
- Locate the 'Item Warehouse' object on the left side (Available) of the screen and double click on the object.   The following window will be displayed:

- Click on the button to the right of the Workspace field [icon] to create a new Workspace.

- Double click on (new) to create a new Workspace. The following card will be displayed:

Section	Description
List Options	
Presentation	**Initial View, Subset & Sort** – defines which customizations will be used to display the records when you double click on the object.

	Restricted by Subset – if entered, the subset shown on the list cannot be switched to a different subset
Navigation	Open Action – defines mode when you double click on a record in the list. Some of the options include: inquiry, change, delete, transactions, list locations, orders, allocations, etc. **<Alt> + open** – defines the mode when holding down the 'ALT' key and double clicking on the record **<Ctrl> + Open** - defines the mode when holding down the 'CTRL' key and double clicking on the record
Split View	Splitting the view will cause a truncated list to be displayed on the left side of the screen and the selected data on the right side when you single click on an item. (See explanation and sample below).
Object Options	
Presentation	**Title** – name of the object to be displayed on the Inventory card **Title Message** – Internal message **Large Icon** – name of the icon to be used
Navigation	**Initial Card File** – Name of the card file to be used when double clicking on a record **Initial Card** – The card that you want to be displayed in the card file **Tab Style** – Where do you want the tabs for the cards (top, right, left, bottom)
Templates	Name of the template that should be used when creating a new record in this Workspace, changing a record or copying a record.
Find	When using the magnifying glass what field(s) in the prompt do you want to be displayed.

- After defining the Workspace, you will be returned to the Application Card List Definition:

- **Be sure to change the Label so that you will know how the Workspace is restricting the list.**
- After you click 'Continue' you will be returned to the list of objects. Notice that there are 2 Item Warehouse objects on the list with different labels:

- Apply the change to the main card and you will see the 2 objects:

- On the card above, if you double click on 'Item Warehouses' a list of all Item Warehouse records will be displayed.   This will include multiple warehouses.
- If you double click on 'Warehouse AUS' then only Item Warehouse records for warehouse AUS will be displayed because of the Workspace.

Split List

- The Workspace definition asked for a 'Split' list with the Item Warehouse Locations to be displayed on the right side:

- On the screen above, single clicking on an item (AA1118) will display the Item Locations and their quantities because of the split screen definition.
- This is the function that replaces Work Benches in PowerLink.

Attachments

- An attachment is a file that is stored somewhere on your PC or on your company's network that you want to create a link to a record.
- Examples of attachments are:
  - Drawings attached to Item Revision records.
  - Customer PO that's been saved as a PDF attached to a customer order.
  - QC documents attached to an MO.
- Attachments create a link to the file.   There are options to: open the file, display the file information and print the file.
- When opening the file, Net-Link will look at the suffix and launch the appropriate software to open the file.
  - For example, if the document ends with '.docx' then Word will open to display the document.
- Attachments will go to the appropriate history file when the order moves from open to history files.

Create an Attachment

- Single click on the record to which you want to add the attachment and click on the 'Attachment' button
- A list of attachments (if they exist) will be displayed:

- The example above does not have any attachments.   Click on the 'Add' button to create a new attachment:
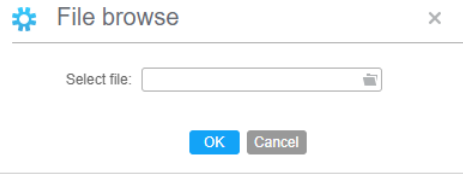
- Use the 'Browse' button to the far right of 'Path and name' field to search for the file.
   - A 'File Browse' window will be displayed. Click on the folder in the 'Select File' field to browse.

- Locate the file you want to attach.
    - Double click on the file and verify that it's the correct file by clicking on the 'OK' button.
    - You will be returned to the 'Create Attachment' window:
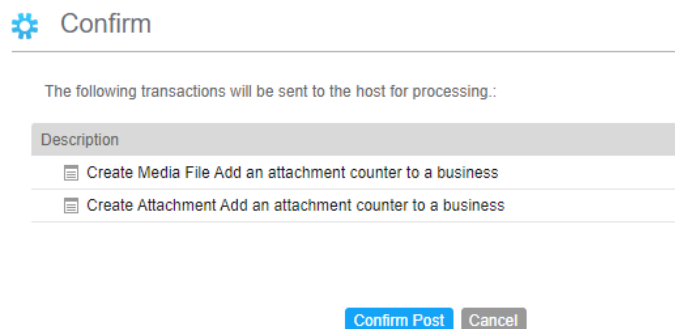
- A 'Confirm' window will be displayed.   Click the 'Confirm Post' button to create the attachment.

- The attachment will be displayed:

- To open the file, double click on the attachment record.
- A 'download' window will be displayed on your screen:
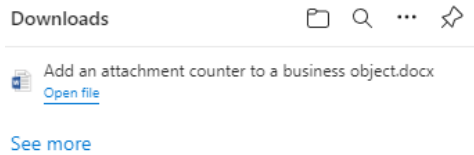
- Click the 'Open File' link and the attachment will be displayed.
- The example below is the first page of the word document (Infor KB article) that was attached to the Item Revision based on the print screens shown above.

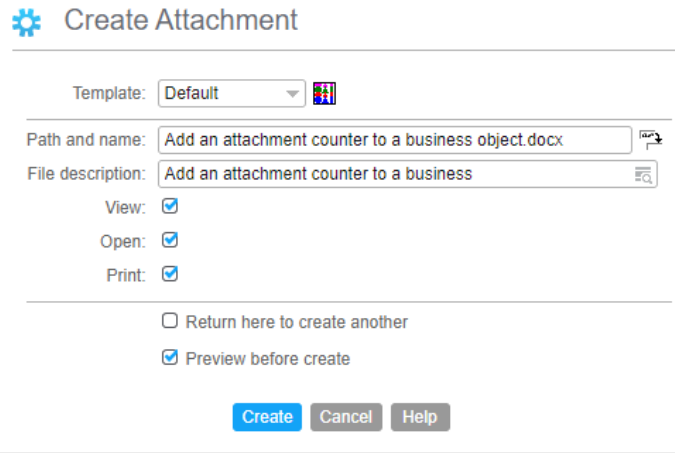Add an attachment counter to a business object.

An attachment counter will allow users to easily identify records that have an attachment link associated with the record.

The use of attachment counters is setup within each business object via the Integrator application as needed.

The implementation of attachments o Purchase Orders and Purchase Order Items is an example of how this can be used.

Export a List to Excel

- o Lists can be exported from Net-Link to a spreadsheet, HTML or Text file.
- o There are 2 options for exporting:
  - o Export to Clipboard (easiest, in my opinion)
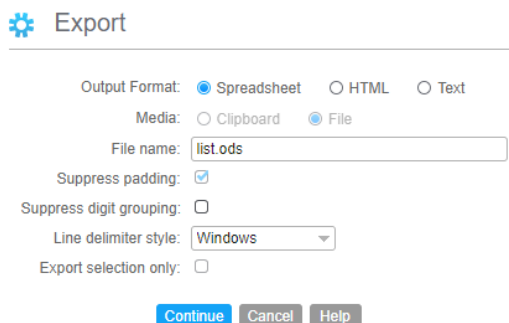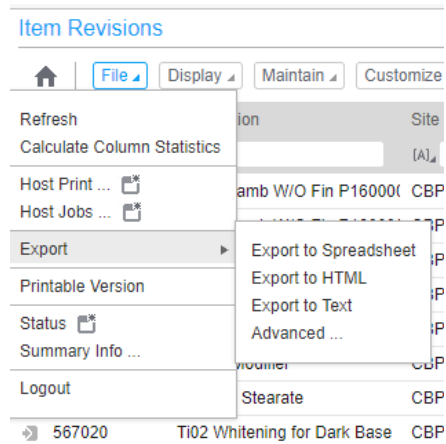 - o Export to File

Advanced Options

- • The 'Advanced' options allow you to specify type of file and the conditions that should be assigned:

Field	Description
Output format	Choose between Spreadsheet, HTML or Text
Media	Copy the data to your clipboard or to a file
File name	Name the file
Suppress padding	Similar to 'trim' in Excel. Prevents null characters from being exported.
Suppress digit grouping	
Line delimiter style	Defaults to 'Windows'
Export Selection only	If you have highlighted records in the list by holding down control and single clicking on those records you want to export then checking this option will export only those records.

Export to Clipboard

- o ***Very Important: Make sure that the clipboard limit in the 'Global Preferences' is set to 9,999,999 otherwise the entire list might not export.***
- o To export a list:
  - o Apply the view, subset and sort that you want to use.
  - o Set the Advanced options for exporting.
  - o Click on 'File' then 'Export':

- Select 'Export to Spreadsheet'. A download window will be displayed showing the export:

- Click on the 'Open file' option.
- A spreadsheet will be displayed with the information from the export:

Setting Preferences

- Preferences allow you to customize Net-Link to make you more efficient, i.e. less clicks to get to the data that you need to do your job. This is one of the most powerful and least used features in both PowerLink & Net-Link.
- There are 2 types of Preferences in Net-Link: Global and individual object.
    - System Preferences define font size, Net-Link Card File & active card and Clipboard size for exporting.
    - Object Preferences define:
        - Default view, subset and sort.
        - Default card file and card for the business object.

        - Subset to use when using the 'find' option when there's a search button by a field.
        - Default Template to use when creating a record.
        - View maintenance history.

Global Preferences

- To get to 'Global Preferences' from the main Net-Link card file, select 'Customize' then 'Global Preferences'.
- You can also get to Global Preferences within an object. Click on 'Customize' and at the bottom of the list you will see both 'Preferences' (business object preferences) and 'Global Preferences'
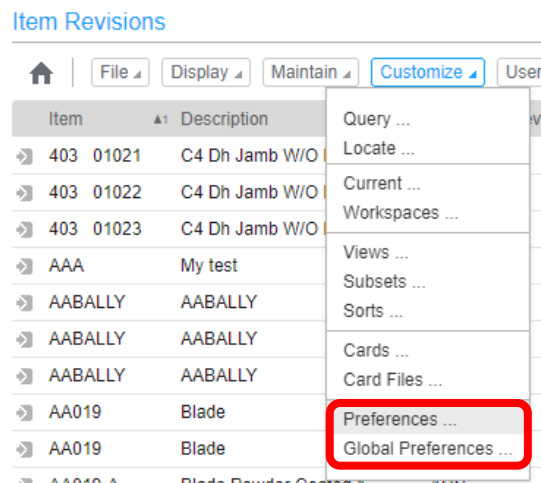
- The Global Preferences window is displayed below:

Section/Field	Description
Main Browser	
Initial Card File	Define the card file for Net-Link to be displayed when you sign in
Initial Card	Define which card should be open/active when you sign in
Tab Style	Where do you want the tabs to display on the main Net-Link cards
List	
Open Action	When you double click on a record in a list, what should the default action be (i.e. display, change, add, etc.)
<Alt> Open Action	If you hold down the 'Alt' key when double clicking, what should the default action be?
<Ctrl> Open Action	If you hold down the 'Ctrl' key when double clicking, what should the default action be?
Miscellaneous	
Navigation History	Track what cards/tabs have been used during the current session
Limit Clipboard Export	Used for exporting data to excel. Recommendation: set this to 9999999
Confirmation Dialogs	A 'Confirmation Dialog' is an 'Are you sure?' window. If you want the window to be displayed, check this box.
Card Files	
Single tab behavior	If there's only 1 card in a card file, do you want the tab to be displayed?
Cards	
Attribute	

Focus Navigation Style	Defines the sequence of the fields on an attribute card. US & European default would be 'left to right, top to bottom'.
Limit Maintenance Hist.	Number of records to limit the display of Maintenance History
Overview	
Power Expand Levels	When opening an Overview card, how many levels should be open when the card is displayed?
Compound	
Avoid section scrolling	In a compound card, do you want to prevent scrolling in a section?
Max. List/Overview rows	Maximum number of rows of data to be displayed on a list or overview card.

Object Preferences

- When you're in the business object, click on 'Customize' then 'Preferences'.
- There will be multiple cards in the following card file:
  - General
    - The 'General' options will change depending on which object you're in.
    - Set the data defaults on the 'General' tab to prevent repetitive entry of data.
    - An option (such as the one below) can be used to make Item Revision creation happen with less pop up windows displayed.

- List
  - Defines the initial View, Subset & Sort to be used when opening the object.
  - Open Actions define what mode (add, change delete) to use or what information is displayed when double clicking on a record in the list.

- Object
    - Defines the card file and active card when double clicking on a record in the list.
    - Mingle application cards are the cards default cards to be displayed when sharing a screen using the Infor Mingle application.
    - Templates define default templates for add, change or copy.

- Find
    - Find is used whenever you click on the search button 🔍 next to a field.

- Find defines the subset, view & sort to be used when displaying records for the file.

- Be sure to set a default value for each attribute:

Shortcut keys (Control + other key)

- **Undo** = Control + Z
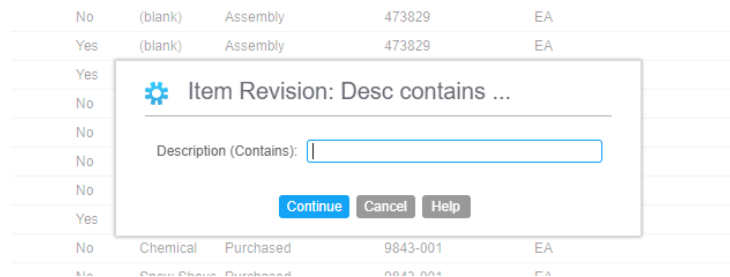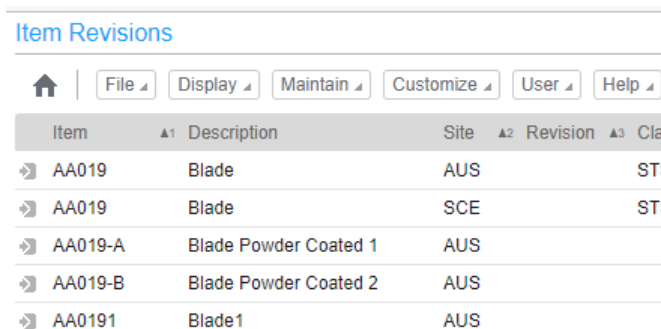 - If you right clicked on a field and created a 'temporary' subset, Ctrl+Z will return you to the original list.
- **Re-display prompt** = Control + Y
  - If your subset has a 'Prompt for Value' option, this will redisplay the prompt.
  - In Item Revision, the subset 'Description Contains' is being selected:
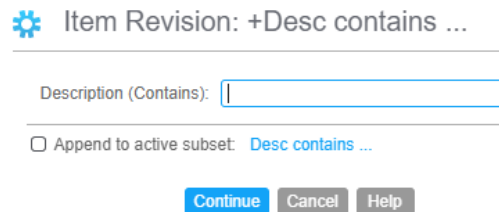
- Enter the word 'Blade' and only those items with blade as part of the description are displayed:
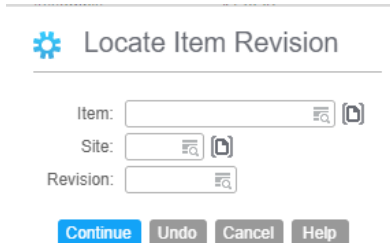
- Ctrl+Y will re-display the prompt, allowing a different word to be entered:

- **Control + C** = Copy
  - When a field is open for edit (i.e. 'Change' mode), highlight the value in the field and use Control + C to copy the value.
  - This is used most frequently to copy an item number.
- Control + V = Paste

- When a field is open for edit, use Control + V to paste the previously copied value into the field
- Control + L = Locate/find
  - In a list, the 'Locate' window will be displayed when pressing Control + L.   This is a shortcut to using the 'Locate' button 🔍 .
  - NOTE: The sort being used will define the fields that are displayed in the Locate window.

Conclusion

- Net-Link allows XA users to access the company's data without having to load software on the PC since the data is displayed via a secure Web Browser location.
- You must have launched your company's VPN and know the URL address to sign into Net-Link.
- The majority of options in Net-Link work like PowerLink but there are several new features that are available in Net-Link.
- Net-Link has been interfaced with Infor's Mingle & Ion applications.   Mingle is an inter-company network site (similar to Teams) and Ion is a workflow application.