# USER SERVICES User Manual

SHUTTLE ENTERPRISE SERVER

The Shuttle Enterprise Server includes the Module called USER SERVICES, to offer to the User those Functions that are useful across all Applications. As is the case with other Application Modules, the functions offered with USER SERVICES can be reached with any of the following methods :- Menu, Companion, Wizards and How_Do_I

Companion, Wizards and How_Do_I can also be reached from any Screen in the system by using the appropriate Screen Icons, e.g. Recent Choices, How_Do_I, Task Desk, Desktop Resources and Further Functions Icons.
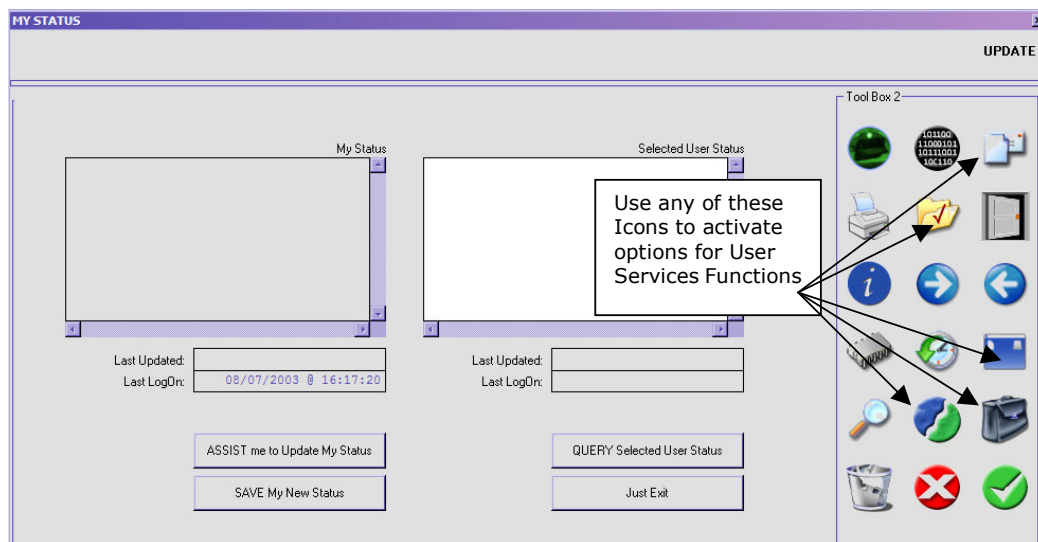
Each User has "Personal Settings" where you may state whether you prefer Maximum Visual Graphics or not, and you may choose whether to use the direct Menu system or the Wizards. Thus, the User Services options may be presented to you in a number of different ways. For purposes of presentation and explanation of the User Services functions in this User Manual, we present the Graphics Method, which displays the User Services options as shown below :-
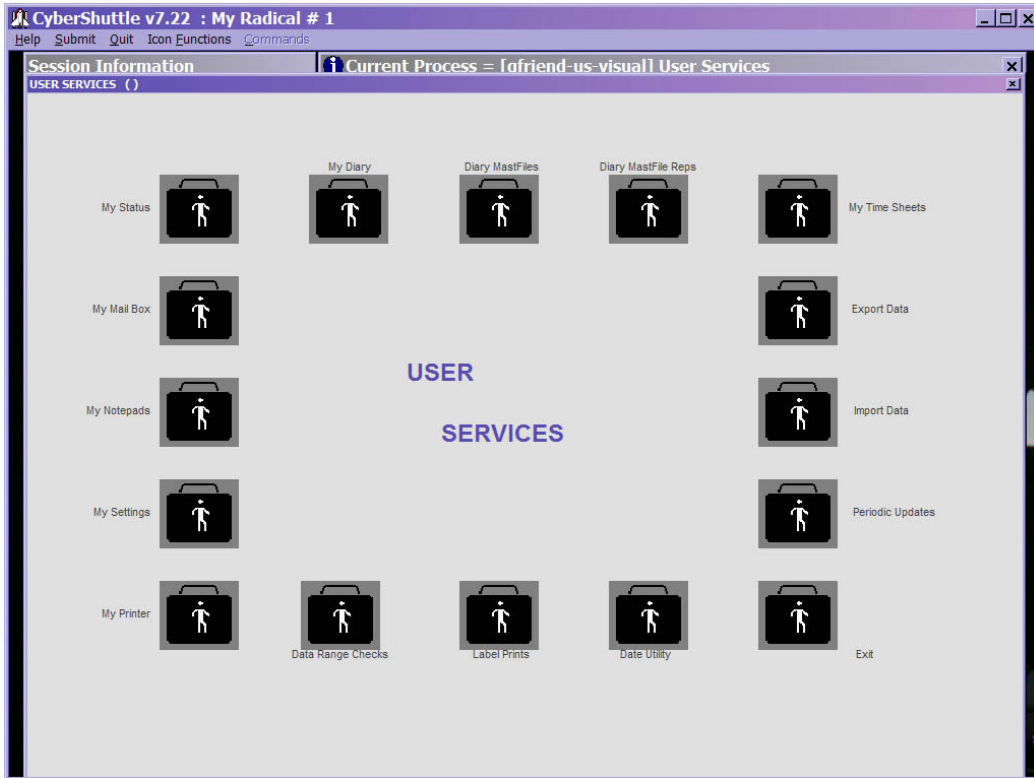
The DIARIES are integrated with the Application environment, and can be used in a number of ways. Since DIARIES include extensive functionality, it is covered as a separate subject in the DIARIES USER MANUAL.
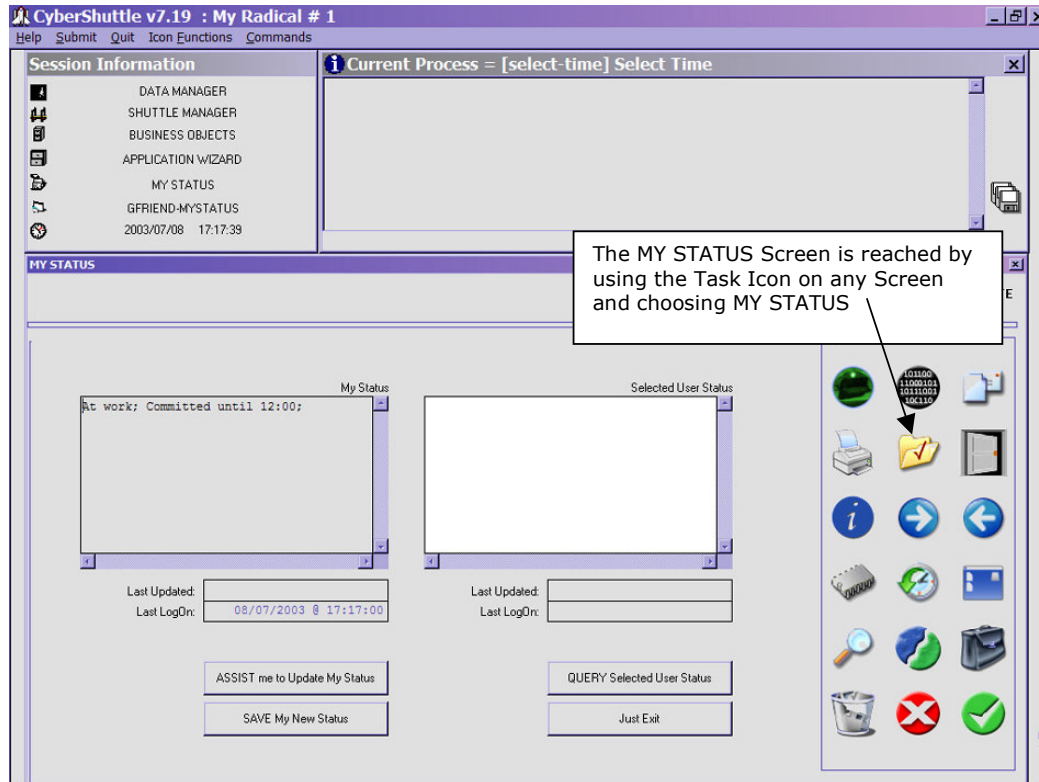
Which leaves us with the remaining options :-

My Status
My Mailbox
My Notepads
My Settings
My Printer
Data Range Checks
Label Printing
Date Utility
My Timesheets
Export Data
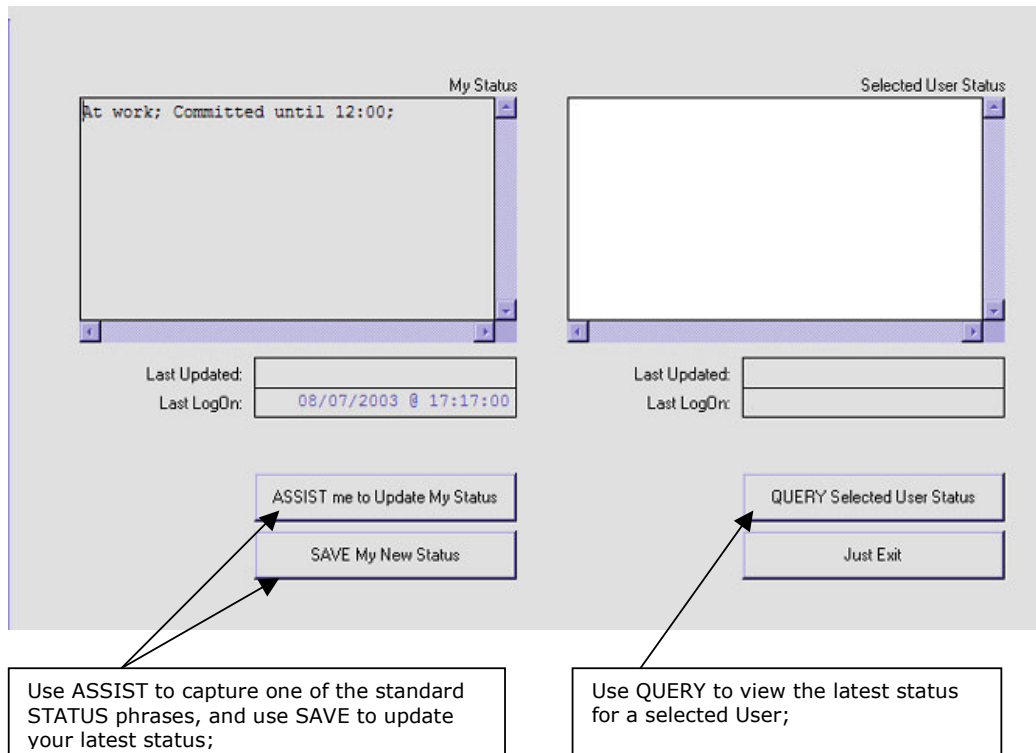Import Data
Periodic Updates

1) My Status

What is the purpose of the MY STATUS Screen? The usefulness of this option is simply to indicate to other Users whether you are available or not, especially if you are a Support or high-profile User about whom others need to know your status. Of course, the Screen is also useful to Query the status of another User,

or to check when is the last time you (or someone else) has Logged On to the system.

You may find that the Screen images used here are not always exactly the same as on your system, and this is simply due to the fact that the User Manuals are not re-written with each system change or new function that is introduced, but you should always be able to use new functions by using the on-line Help while working with the system.

A close-up view of the work area for this Screen is shown below :

Use ASSIST to capture one of the standard STATUS phrases, and use SAVE to update your latest status;

Use QUERY to view the latest status for a selected User;

2) My Mailbox

The Shuttle MailBox is not an e-mail system! While Shuttle supports e-mail, it also offers an 'internal' mail system for Users who use the same Shuttle service. When you use the Shuttle MailBox, you work with messages that are 'server' bound, i.e. they do not leave the system, and are dispatched to 1 or more Users who use the same system. Recipients of mail that you dispatch with this Mail option get their mail in the Shuttle Mailbox while working on the system, or when they next Log On. With this Mail system, you can only send mail to Users who are also registered on the same system.

a) Sending a Message
   Select NEW MESSAGE, then dbl-click the row with the '* new mail *' entry.

b) Reading a Message
   Simply dbl-click a row in the Inbox that you wish to read.

c) Managing your Mailbox
   Use the 'Delete From' and / or 'Clear' Buttons to remove obsolete mail entries.

My Shuttle MailBox

	>>> Inbox		Status	From
1	1302849250	Meeting @ 14h15	mailed	Jo-Ann Bezik

To Read a Message in your Inbox, just dbl-click the Row you wish to read.

Nex Pre

Read Mail   **Delete from InBox**

	>>> Outbox		Status
1	1302849209	*** new mail ***	draft

CLEAR InBox

CLEAR OutBox

CLEAR ALL

New Message   **Access OutBox**   **Delete from OutBox**

exit MAILBOX

To send a Message, you simply click 'New Message', which creates an item in the Outbox. You then dbl-click the row in the Outbox that you wish to Edit before dispatching it, which produces an item as shown below.

Mail Message Text

Subject Title	Meeting @ 14h15
Originator	Jo-Ann Bezik
Global Status	draft

	Mailed On	At
1		

	Addressees	Last Read	Ti
1			

Please be in the Boardroom at 14h15 for a Staff Meeting;|

Select Addressees   **exit**   **Save or Mail It!**

This is an example of a new Mail Message. You simply edit the Subject Title, type any additional detail in the Box provided, and use 'Select Addressees' before choosing 'Save or Mail it'. When this message is dispatched, it appears in the Inbox of the other User as seen in the first picture (above).
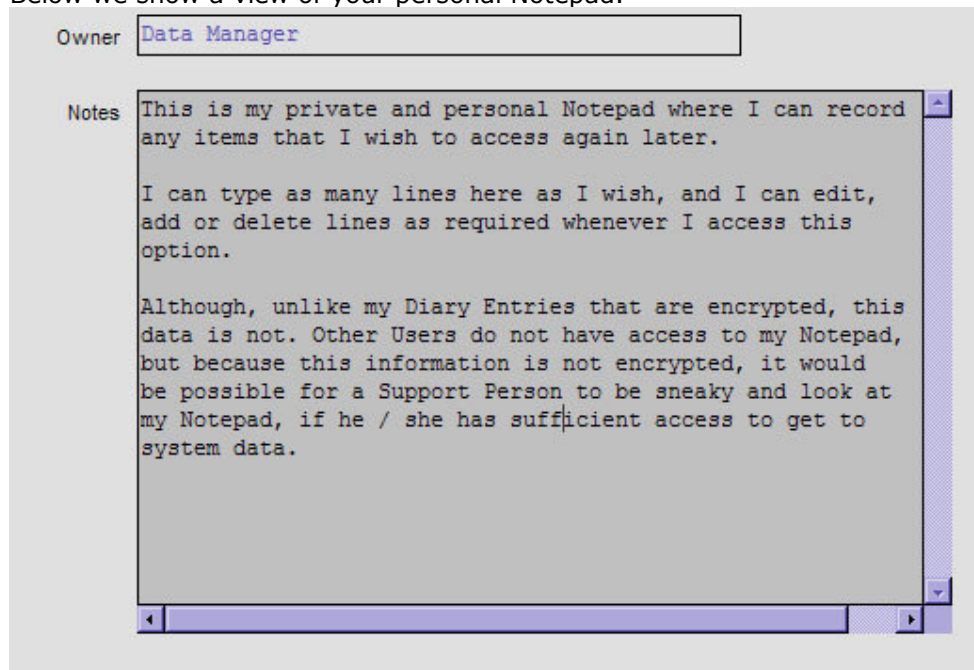
3) My Notepads

The system includes both Personal and Corporate Notepads. Your personal Notepad is a scratchpad to record any information you need to refer to again later. You may freely edit, add and delete lines as may be required.

[Hint: There are many uses that Users invent for Notepad, one of which is to type a list of Entries that you can copy and paste into other Data Screens.]

Since the Notepad may be reached from any other Screen that you chance to be working on at any stage, it is useful (possibly more so than paper) to record ad hoc and / or other information.

Below we show a view of your personal Notepad.

The Corporate Notepads are only accessible by those who are given specific access to 1 or more of the 5 Corporate Notepads that are provided. These are offered as 1-liner Notes for Users in Workgroups, where it is necessary to record Notes that others in the Workgroup should be aware of. Each line indicates the Originator of the entry.

When you do not have access to any Corporate Notepads, the system will simply open your Personal Notepad, as shown above. Should you have access to 1 or more Corporate Notepads in addition, you will have to select which Notepad to open whenever you choose 'Notepad', as shown below.

With Corporate Notepads, you may have either 'Look' or 'Update' Access. For example, you may have 'Look' access on Notepad #2, in order to view entries there, but unable to contribute, whereas on Notepad # 3, you may have Update access, which allows you both to Look and Contribute entries. Below is an example of a Corporate Notepad.

4) My Settings

My Settings (also called My Preferences) is your opportunity to advise Shuttle on how you prefer to work with the system. The 'My Settings' screen has 3 tabs (3 pages), and we will have a look at each of them, to note the options you have.

On the MAIN tab, you may change your Password, and set a number of other options –

Change your password here (the system will immediately encrypt it), and indicate whether or not you wish to see the on-line Community Messages and System Tips.
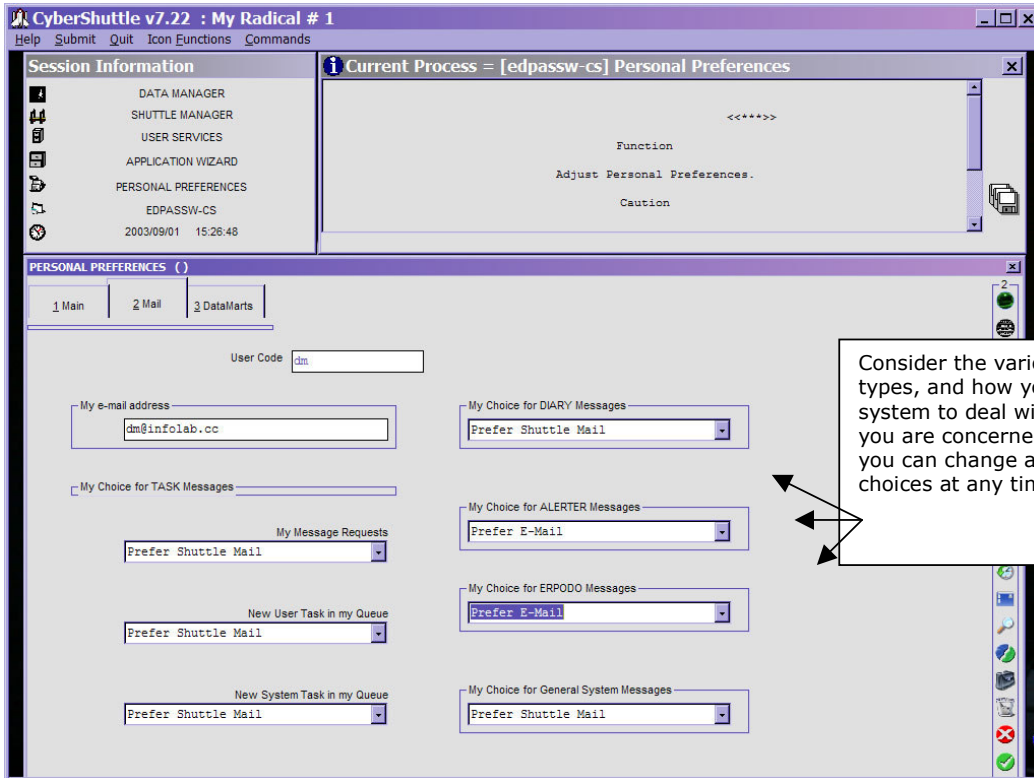
Here you can choose your TextBox Focus Color, Screen Background Color, and your preferred Font.

Hint: Some fonts are proportional, others not. Fonts that will align Financials nicely include System, Terminal and Courier New.

Hint(2) : Your Screens will also automatically adapt to your current Windows Appearance Schema.

PERSONAL PREFERENCES ( )

1 Main   2 Mail   3 DataMarts

User Code   dm

Change your Password here
AEE16396

See Community Messages and Tips ?
☐ Community Messages
☑ Tips Display

Grid Editor to Use
Direct

Select Default Printer
def def

Omit Column Headers on Quick Reports ?
Always Ask

Screen Preferences
Text Box Focus Color
2 – dark grey

Standard Color Schema
Light Grey

Preferred Character Font
Courier New

Communications Setting: Personal Poller
System Balanced Polling

☑ Maximum Visual Graphics
☐ Screen Mode Indicator
☐ Confirm ESC for Screen Exit

Exit but don't Update

UPDATE my Preferences

You may use Direct or PopUp Grid Editing (you can also change this dynamically while accessing any grid), and you may select your Default Printer here, or indicate how the system should deal with your Report Headers.
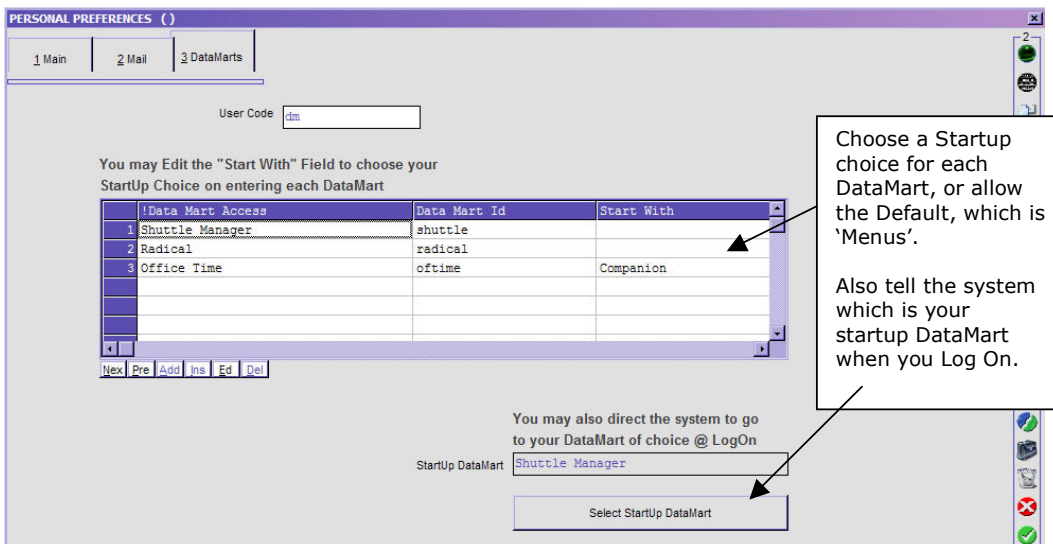
You may choose Max Visual Graphics (mainly for Wizards), or standard navigation, you can show or hide Screen Indicators (Update/Look), and you can ask the system to Confirm Screen Exit when you push ESCAPE on a Screen.

The MAIL tab deals with the various kinds of Messages and Notifications forwarded to you by the system, and your choice in each case. With some Message types, you can choose not to be notified at all, but with most you have to choose between Shuttle Mail and E-Mail notification. There is on-line Help on each choice of Message Type.

CyberShuttle v7.22 : My Radical # 1

Help Submit Quit Icon Functions Commands

Session Information

DATA MANAGER
SHUTTLE MANAGER
USER SERVICES
APPLICATION WIZARD
PERSONAL PREFERENCES
EDPASSW-CS
2003/09/01 15:26:48

Current Process = [edpassw-cs] Personal Preferences

<<***>>

Function

Adjust Personal Preferences.

Caution

PERSONAL PREFERENCES ( )

1 Main   2 Mail   3 DataMarts

User Code dm

My e-mail address
dm@infolab.cc

My Choice for TASK Messages

My Message Requests
Prefer Shuttle Mail

New User Task in my Queue
Prefer Shuttle Mail

New System Task in my Queue
Prefer Shuttle Mail

My Choice for DIARY Messages
Prefer Shuttle Mail

My Choice for ALERTER Messages
Prefer E-Mail

My Choice for ERPODO Messages
Prefer E-Mail

My Choice for General System Messages
Prefer Shuttle Mail

> Consider the various Message types, and how you prefer the system to deal with each where you are concerned. Of course you can change any of these choices at any time.
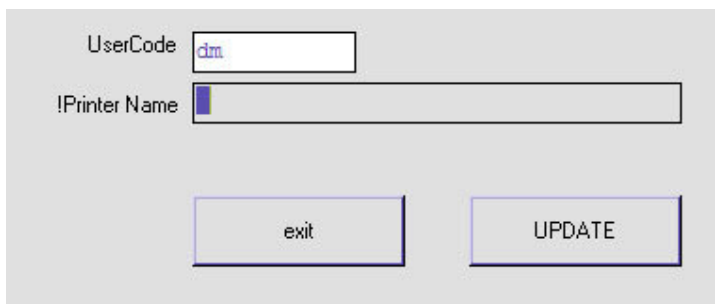
The DATAMARTS tab not only shows which DataMarts on the system you have access to, but also allows you to indicate a startup choice for each, e.g. start with the Menu, or with Companion, or Wizards or How_Do_I when you log to each DataMart (you may choose differently for each DataMart!). In addition, you may tell the system which DataMart to take you to as a 1st choice when you Logon.

PERSONAL PREFERENCES ( )

1 Main   2 Mail   3 DataMarts

User Code dm

You may Edit the "Start With" Field to choose your
StartUp Choice on entering each DataMart

	!Data Mart Access	Data Mart Id	Start With
1	Shuttle Manager	shuttle	
2	Radical	radical	
3	Office Time	oftime	Companion

Nex Pre Add Ins Ed Del

You may also direct the system to go to your DataMart of choice @ LogOn

StartUp DataMart Shuttle Manager

Select StartUp DataMart

> Choose a Startup choice for each DataMart, or allow the Default, which is 'Menus'.
>
> Also tell the system which is your startup DataMart when you Log On.

5) My Printer

A User may assign his or her preferred Printer at any stage. "Printer" refers to a Printer assigned to the DataBase Spooler queue, and should not be confused with settings for Printers accessed by Windows, i.e. any Printer may be functioning for both of these situations, but there may also be Printers that are used exclusively with one or the other. The currently assigned Printer for a User determines where the output will be directed to when a User produces a Report from the system and selects "Output to Printer", as opposed to producing Report Output to a File, and then printing the results from Windows print options.
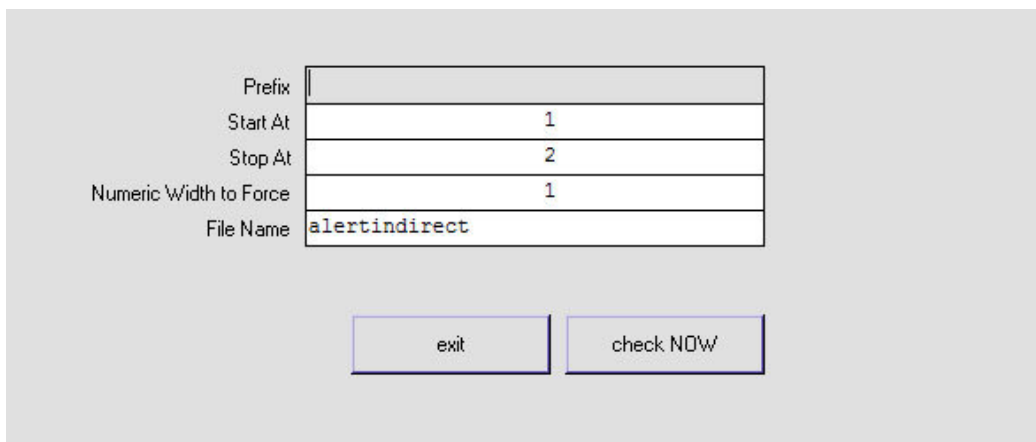
You may certainly use the lookup to determine the list of available Printers on your system.

UserCode	dm
!Printer Name	

exit	UPDATE

6) Data Range Checks

This utility produces a Report that details which Keys in a specified Range are on File or missing. This is useful for "completeness" checks, e.g. whether all expected Capture Documents have been processed, all expected Purchase Order Numbers are present, etc.

Prefix	
Start At	1
Stop At	2
Numeric Width to Force	1
File Name	alertindirect

exit	check NOW

Range checks are done on File Item keys. These keys may or may not be numerical. Whereas the Prefix is an optional parameter to specify when doing a range check on a file, it is also the only way you can perform a proper check if there is an Alpha prefix on the keys ...

Examples:

1) Check range ADE100 - ADE150

    Prefix   ADE
    Start at   100
    Stop at   150

2) Check range 23510 - 23535

Prefix	235		Prefix	
Start at	10	OR	Start at	23510
Stop at	35		Stop at	23535

7) Label Printing

Label Printing is a utility offered for producing (sticky?) labels directly from Application Data. This can be used for Addresses, Stock Items and other Data that you wish to reproduce on labels.

It is not necessary to figure out the different prompts for the Label Run every time you wish to produce Labels. Instead, once you have a specification defined, you may save it for future use, and you may have any number of such specifications on file for re-use, e.g. for different Label Stationery types.

The system is also able to start on a specific Label on the page, i.e. in order to allow you to start with a partially used label stationery page, and you may customize the specification to cater for any type of label stationery. Please

consider the on-line Help for each of the prompts shown, to understand how to apply it.

8) Date Utility

The DATE UTILITY is often used by those who wish to know the internal Date for a specified standard Date Format, or vice versa.
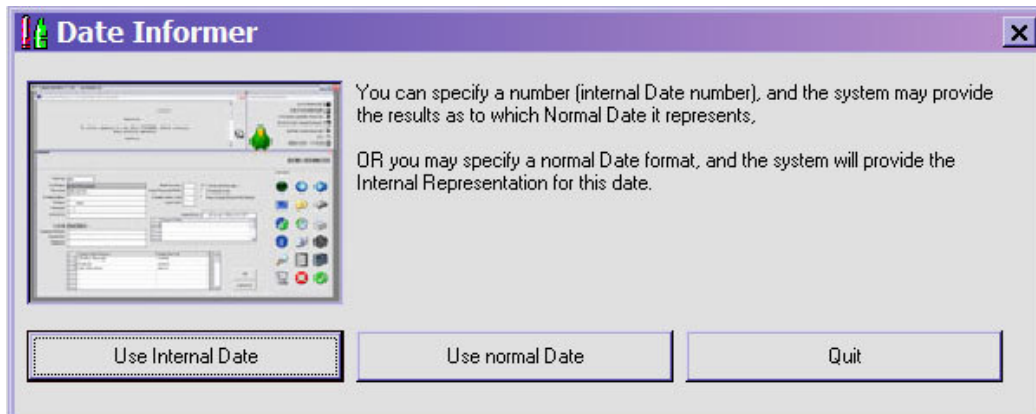
Specify either a Normal or Internal Date (number), and the system will display the details, as shown here -

9) My Timesheets

Time Sheets are offered as an integrated function that can be accessed and updated seamlessly from Tasks and Diaries, as well as updated from your Common Tasks List. There is also a 'Clock In' and 'Clock Out for the day' function, for those who find this useful. Time Sheets offer a lot of functionality for Time Management and Measurement, and may be used in conjunction with the Time Tracker utility. Being an extensive subject, it is dealt with separately in the 'Time Management' User Manual.

10)   Export Data

Data Exports, perhaps more easily understood as Data Queries (as opposed to performing Reports), is a standard function in SHUTTLE, and all Users have access to this function. However, the Systems Administrator may impose Rules with regards to which Data Files (and even Fields in such Files), may be Queried and by whom.

In the picture shown below, we note the following points :-

> The Key may be constructed per your preference, and a Description is specified for the Query, so it may be identified again later for possible re-use.

> Once the Data Source has been specified, the 'Select Query Fields' will offer you available Data Fields on the File, and you simply select the Items to include. Each Field will translate to 1 Column in a Spreadsheet or on a Report.

Query Key	dm-qry-1

Description	Sample Query from the HDOCS file
Target Environment	w Windows
Delimiter	,
Data Source	hdocs
Data Selector	hdocs FIND HELP BY FILE KEY

	Query Fields
1	key
2	help

☐ Omit Column Headers
☑ Enable Multi-Values

| Last Updated By	Data Manager
Last Updated On	23/09/2003

> The system automatically records ownership of a Query, which means that although another User may make a Copy of your Query Definition for him or herself, nobody may make any changes to your Query Specifications, since you may wish to use it again in future.

Data Selector Wizard	Select Query Fields	Exit	Execute / Save

Note also /
1) The standard default Delimiter on a new Query is ',' (comma). You may of course choose a different delimiter, but Comma is probably the most useful for exporting Data to Spreadsheets, because they will automatically sense this as a Column delimiter in your Data. Besides, CyberShuttle is clever enough to intercept other Commas in your Financial Values, and won't see those as Delimiters while exporting the Data. The Delimiter Field is irrelevant if you choose a 'Report Format' for your Query when you execute it.
2) The Data Source is the File that contains the Data from where you want to select all or some Data, while the Data Selector is the Shuttle Object that will determine which Data to select (see 'Data Selectors' User Manual). Once the Data Source has been specified, the 'Data Selector Wizard' button will allow you to either select from existing Data Selectors on this Data Source, or to define an entirely new Data Selectors with Selection Rules that you may choose.

3) You can choose whether Column Headers should be excluded from the Results Set, and you can of course choose to allow Multi-Values (long live the Multi-Value Data Model!).
4) To retrieve an existing Query for re-use or modification, simply dbl-click on the Key Field, and choose 'Lookup'.

Now that we have successfully defined a Query, let's consider what happens when we choose 'Execute / Save'.
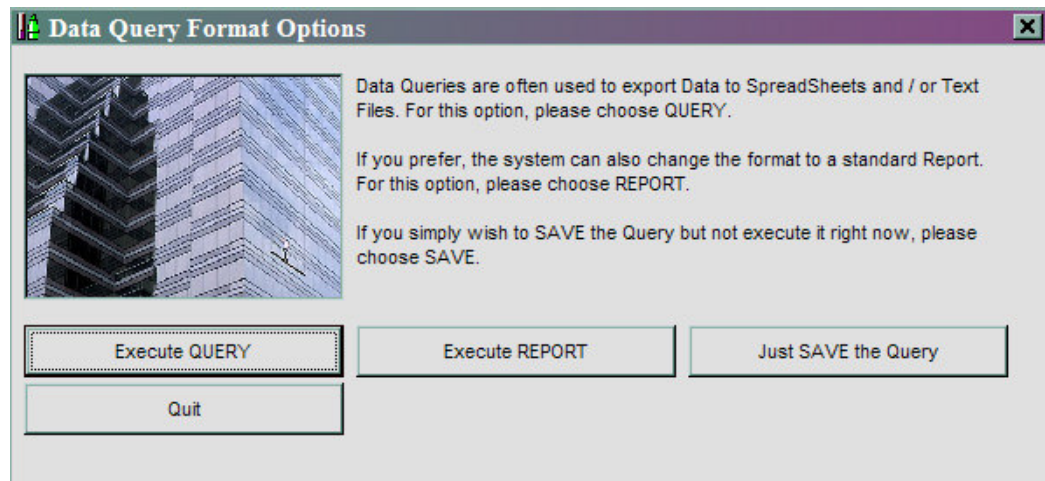
The Query may be EXECUTED now (for Output to Spreadsheets, choose this option), or it may be executed as a REPORT instead of a Query (Shuttle will automatically convert the Query to a Report format, which demonstrates another way that Users may construct their own Reports!), or the Query may simply be SAVED until some future time.

If we choose the EXECUTE REPORT option, the following will happen –

OPTIONS FOR REPORT OR QUERY EXECUTION ()

1 Execution   2 Mail

Options for REPORT or QUERY Execution :   User QueryBuilder Report

Report Header

Data Query Report on FileName: HDOCS

Format REPORT
OutPut FILE
File Type txt TEXT FILE

Data Selector

hdocs FIND HELP BY FILE KEY

Pre-Defined Data Selector Choice   CHANGE

☐ Despatch by E-Mail

Mail To

	>>> Data Selection Criteria	Rules to Apply
1	key pattern to lookup ?	[]

Choose A Record Status
○ OPEN Records only
○ CLOSED Records Only
◉ EITHER

There could be multiple or no Rules here with Runtime Criteria, depending on the chosen Data Selector

ABANDON   NEXT

In the picture above, we see that the system produces a Screen with a number of options. We can choose whether to execute this Report to a File or the Printer, we can change the Report Heading, or perhaps dispatch the Results by e-mail. We can also respond to the Data Selector Runtime Criteria, i.e. to determine which Records will be selected.

In the example above, we will change the '[]' wildcard default to read 'a]', which means all records where the Key starts with 'a' will be selected. Then, when we choose NEXT, we will get something like this –
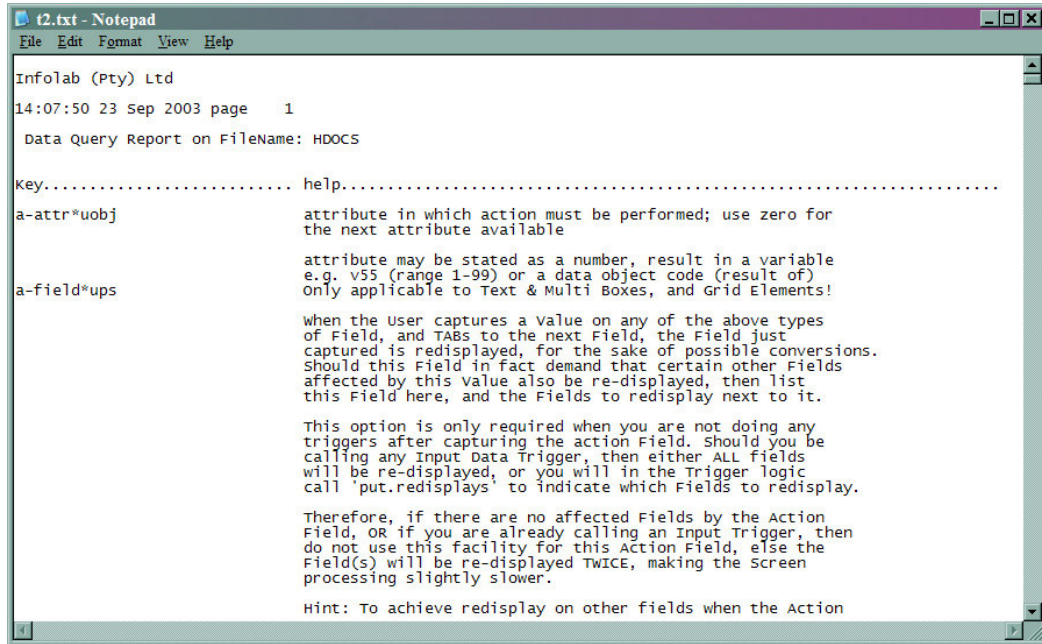

File Browser & Executor

FileName

c:\cybershuttle\shuttlec\docs\t2.txt

Open   Browse   Close

Use OPEN to open a designated FileName, BROWSE to find and select a FileName, CLOSE to quit this function.

The system has an automatic File Naming method to choose an output File for such Reports, and once the Results are ready, we only need to choose OPEN to see our Report –

```
t2.txt - Notepad
File  Edit  Format  View  Help

Infolab (Pty) Ltd

14:07:50 23 Sep 2003 page     1

 Data Query Report on FileName: HDOCS


Key.......................... help...................................................

a-attr*uobj                 attribute in which action must be performed; use zero for
                            the next attribute available

                            attribute may be stated as a number, result in a variable
                            e.g. v55 (range 1-99) or a data object code (result of)
a-field*ups                 Only applicable to Text & Multi Boxes, and Grid Elements!

                            when the User captures a Value on any of the above types
                            of Field, and TABs to the next Field, the Field just
                            captured is redisplayed, for the sake of possible conversions.
                            should this Field in fact demand that certain other Fields
                            affected by this Value also be re-displayed, then list
                            this Field here, and the Fields to redisplay next to it.

                            This option is only required when you are not doing any
                            triggers after capturing the action Field. Should you be
                            calling any Input Data Trigger, then either ALL fields
                            will be re-displayed, or you will in the Trigger logic
                            call 'put.redisplays' to indicate which Fields to redisplay.

                            Therefore, if there are no affected Fields by the Action
                            Field, OR if you are already calling an Input Trigger, then
                            do not use this facility for this Action Field, else the
                            Field(s) will be re-displayed TWICE, making the Screen
                            processing slightly slower.

                            Hint: To achieve redisplay on other fields when the Action
```

And our results include all Records where the Key starts with 'a'.

Now what happens when we choose to execute a QUERY, i.e. to direct the output Results to a Spreadsheet?
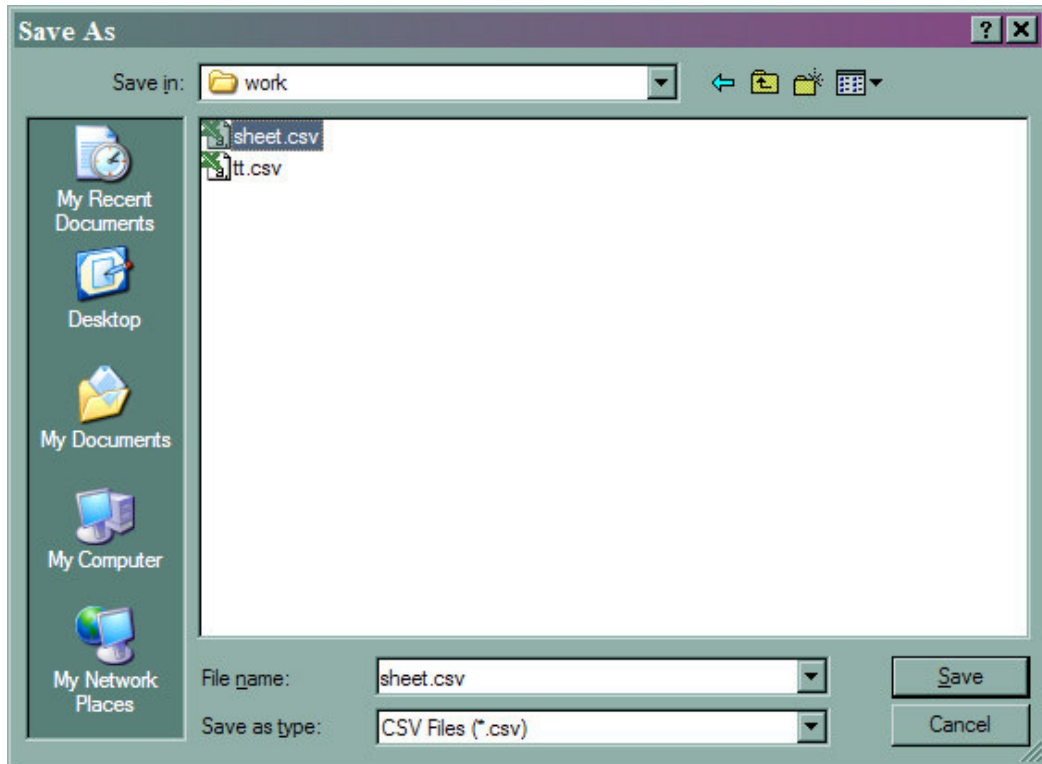
This time, we choose a File (after selecting type 'CSV' for Comma Separated Values).

You may change the default Selection Criteria
specified below, or simply proceed 'as is' ...

	>>> As Redefined By User	Retrieval Dialogue
1	[]	key pattern to lookup ?

Nex Pre Add Ins Ed Del

HELP ME   PROCEED

We still get prompted with the Runtime Selection Rules, and we reply 'a]'
again (if we accept the Screen as is, then all Records in the File will be
selected). Then we choose PROCEED.

And we find that the Results are put into Columns in the Spreadsheet –

Microsoft Excel - sheet.csv

File Edit View Insert Format Tools Data Window Help

A1   =

	A	B	C	D	E	F	G
1		HELP					
2							
3	a-attr*uobj	attribute in which action must be performed; use zero for					
4		the next attribute available					
5							
6		attribute may be stated as a number result in a variable					
7		e.g. v55 (range 1-99) or a data object code (result of)					
8	a-field*ups	Only applicable to Text & Multi Boxes and Grid Elements!					
9							
10		When the User captures a Value on any of the above types					
11		of Field and TABs to the next Field the Field just					
12		captured is redisplayed for the sake of possible conversions.					
13		Should this Field in fact demand that certain other Fields					
14		affected by this Value also be re-displayed then list					
15		this Field here and the Fields to redisplay next to it.					
16							
17		This option is only required when you are not doing any					
18		triggers after capturing the action Field. Should you be					
19		calling any Input Data Trigger then either ALL fields					
20		will be re-displayed or you will in the Trigger logic					

Note that in the example above, we have a Multi-Valued Text Field coming
through in Column 2.

11)   Import Data

A Data Import is the method that facilitates importation of Data outside the database from some other container, e.g. an outside File, SpreadSheet, or other.

Import #	my_import		An Import Object Specification has a unique Key of your own design, and a Description to recognize it by. Import Objects may once-off or specified for re-use in future.

Description

My Data Import # 1

The Import Bay refers to a local FileName in a Shuttle DataMart.

Import Bay / FileName	inbay1
Import Mode	Data

Separator / Mask	,
Max Attribs / Fields	10

Exit	Import	Save

The allowed FileNames that you may use to import data into, are controlled by the Systems Administrator. The File that you will import the data from, i.e. the Source, will be prompted for when you perform the Import.

Shuttle supports importation of ASCII and CSV (Comma Separated Values) Files. If you place the File to be Imported from in a Shuttle Fast Drive Directory, e.g. a Windows Folder so specified (ask your Systems Administrator whether any such drives have been specified for your system), then the Data Import process will execute considerably faster than otherwise.

Two Import Modes are discerned, i.e. DATA or TEXT. So what's the difference? DATA is usually applied to import a File where each Line will result in a new Record in the Target File, whereas TEXT is used to import a File where the entire contents will become a single Record. Consider the following examples :-
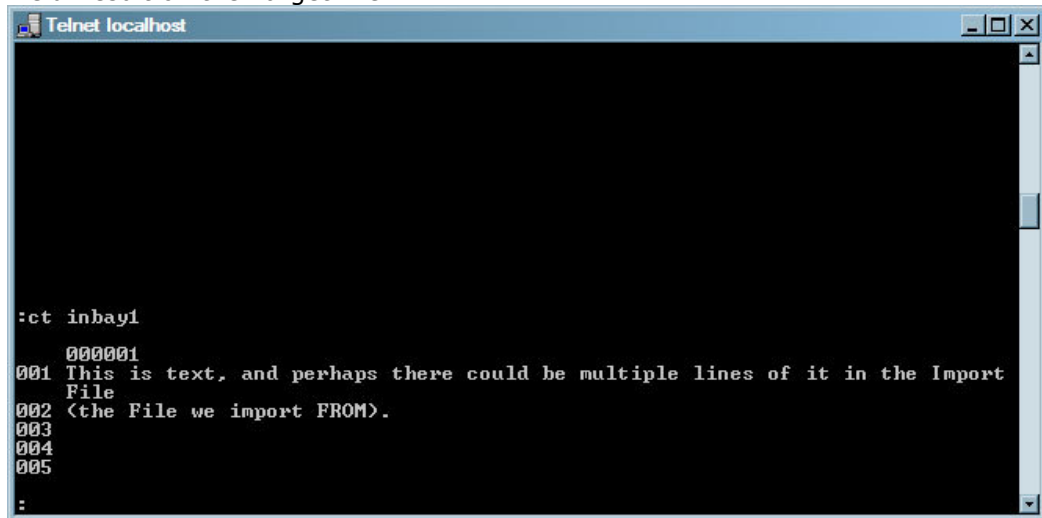
First we will look at a TEXT Import.

Import Data:

This is text, and perhaps there could be multiple lines of it in the Import File (the File we import FROM).

Result in Shuttle:

In the picture presented below, we can clearly see that the imported Data has resulted in a single record, where each line in the Source File has resulted in a Field Result on the Target File.
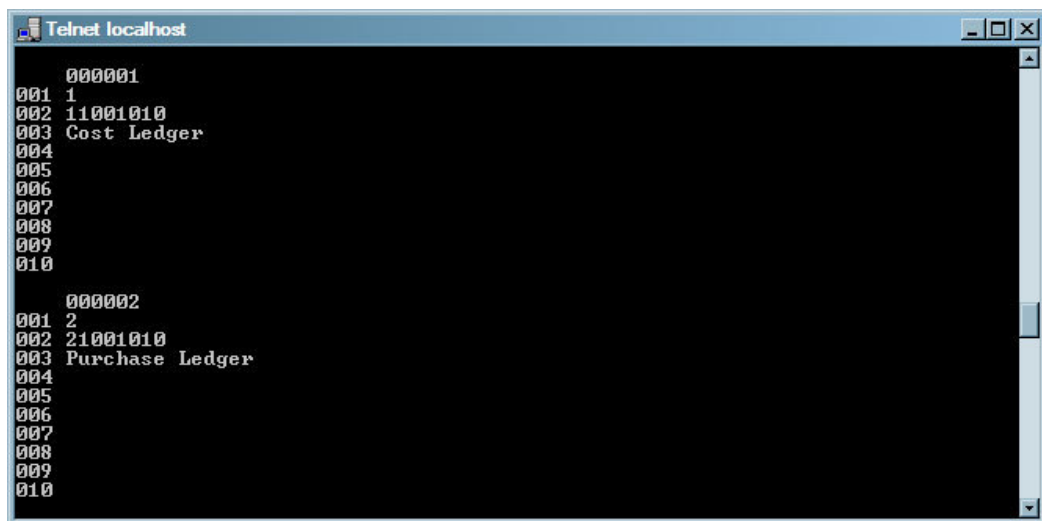

And now let us consider a DATA Import.

Import Data:

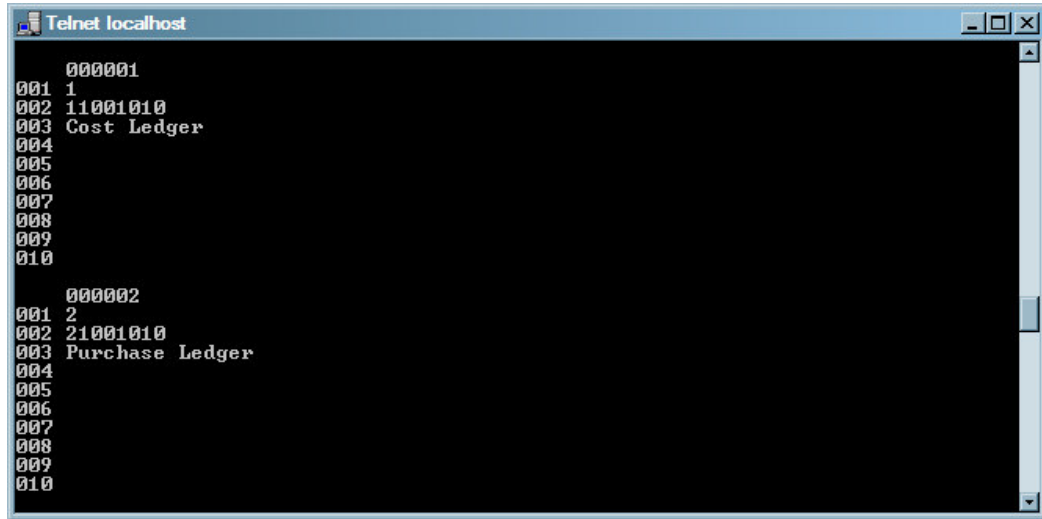1,11001010,Cost Ledger
2,21001010,Purchase Ledger

Result in Shuttle:

And in this case, we see that 2 Records have been created, 1 from each line, and each Data Value separated by comma has resulted in positioning to a new Field Number.

The remaining Parameter Fields on the Import Specification Screen are 'Separator / Mask' and Max Attributes. Both of these are only relevant when the Import Mode = DATA. The Max Attributes rule allows you to specify the maximum number of Fields a Target Record may contain. Therefore, if you specify 5 and more than 5 Fields are implied by the import data, then all Fields beyond the 5th are simply ignored, i.e. not imported.

'Separator' is the simple way to specify that imported Fields are recognized by the character specified as the Delimiter. However, you can also specify a 'Mask' to use when you are working with Formatted Strings that are not delimited by a common separator. For example, a mask of '001300050' means put one character on attrib 1, 300 on attrib 2, 50 on attrib 3, anything remaining on attrib 4. Each three characters in the mask string denotes the number of characters for the nth Field (attribute).

12)   Periodic Updates

What is a periodic Update? A Periodic Update is a specification of how to manipulate Data in a File, and which may be performed on demand. Access to this function is usually provided to those who have a need to perform such Data Manipulations from time to time, but the Systems Administrator may also apply 'rules' as to which Files may be updated with this type of function.
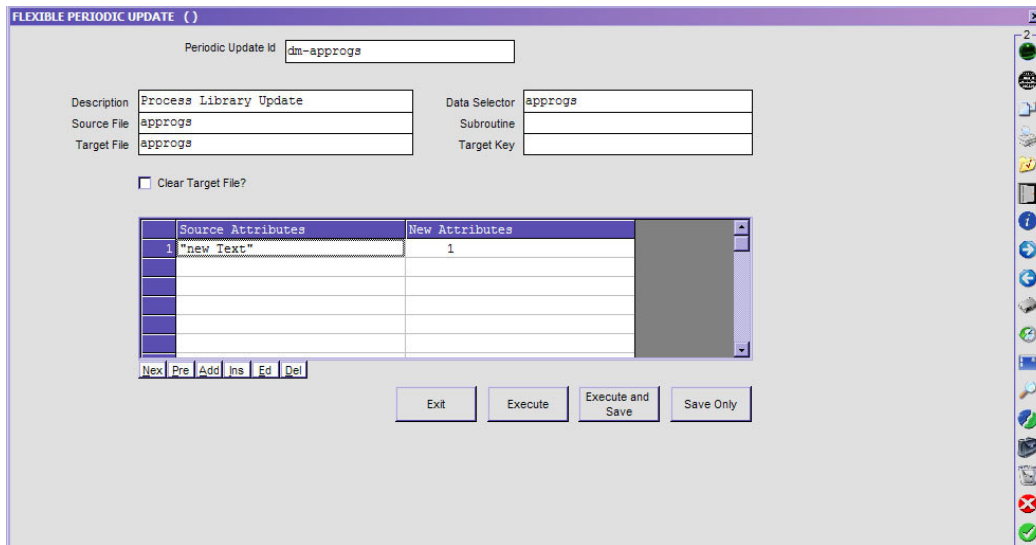
A Periodic Update object is identified by a unique key, and of course includes a Description to differentiate it during lookups, i.e. when you wish to retrieve an existing Periodic Update Object for re-use.

While the Data Source and Target are most often the same FileName, this need not necessarily be the case. When the Update if performed, the system reads Data from the SOURCE, applies the Update Rules and writes the results to the TARGET.

A Data Selector is specified to determine which Records will be retrieved from the SOURCE, and subsequently updated to the TARGET File.

With a Periodic Update, you have 2 choices of how to specify the Update / Manipulation Rules. You can either call a specified Subroutine Name with each Record that is retrieved, in which case the Subroutine produces the RESULT which is then written to the Target, or you may simply specify the manipulations on the Grid Object that lists 'Source Attributes' and 'New Attributes'. (Please consult the on-line Help on each prompt for more detail, and for the Argument List used with these Subroutine Calls.)

In the picture above there is no Subroutine Call specified. Instead, a single Update on each Record to be processed has been specified as :-

Source: "new Text"
New Attribute: 1

The meaning of this is that with each Record to be processed, the system should apply the literal "new Text" and replace whatever Value may currently be on Attribute (Field) # 1 in the Source Record, with this Literal Value, and then use that as the Target Data Record, to be written back on the same Key into the same File.

However, you may also specify different logic to be applied with regards to the Target Key, in which case the 'Target Key' Field will be specified with the necessary Rule (check the on-line Help).