

Tips and Tricks for SSA/LN/Baan Girard May 14 2008

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Toolbar buttons

If shortcut keys are available, they are also listed.

-  [Save and Close](#) (CTRL+L)
-  [Save](#) (CTRL+S)
-  [Print](#) (CTRL+P)
-  [New](#) (CTRL+N)
-  [Duplicate](#) (CTRL+D)
-  [Delete](#) (CTRL+DELETE)
-  [Revert to Saved](#) (CTRL+E)
-  [Find](#) (CTRL+F)
-  [First Record\(s\)](#)
-  [Previous Record\(s\)](#)
-  [Next Record\(s\)](#)
-  [Last Record\(s\)](#)
-  [New Group](#) (CTRL+G)
-  [First Group](#)
-  [Previous Group](#) (CTRL+PAGE UP)
-  [Next Group](#) (CTRL+PAGE DOWN)
-  [Last Group](#)
-  [Texts](#) (CTRL+T)
-  [Attachments](#)
-  [What's this? Help](#)

Shortcuts keys used in SSA BW

Predefined shortcut keys in the Enterprise Server

Action	Shortcut Key	Available in...
New	CTRL+N	overview, combined, details windows
Open	CTRL+O	overview, combined, details windows
Save	CTRL+S	overview, combined, details windows
Save and Close	CTRL+L	overview, combined, details windows
Revert to Saved	CTRL+E	overview, combined, details windows
Print	CTRL+P	overview, combined, details windows
Close	ALT+F4	all windows
Duplicate	CTRL+D	overview, combined, details windows
Delete	CTRL+DEL	overview, combined, details windows
Cut	CTRL+X	all windows (for fields only)
Copy	CTRL+C	all windows (for fields only)
Paste	CTRL+V	all windows (for fields only)

Find	CTRL+F	overview, combined, details windows
Rotate Currency	CTRL+R	overview, combined, details windows
Text	CTRL+T	overview, combined, details windows
First Records	CTRL+HOME	overview, combined windows
Next Record	PAGE DOWN	overview, combined windows
Previous Records	PAGE UP	overview, combined windows
Last Records	CTRL+END	overview, combined windows
Refresh	F5	all windows
New Group	CTRL+G	combined windows
Previous Group	CTRL+PAGE UP	combined windows
Next Group	CTRL+PAGE DOWN	combined windows
Help for Current Session	F1	all windows
Browse	CTRL+B	all windows
Open drop down list	F4	all windows
Next Control	TAB	all windows
Previous Control	SHIFT+TAB	all windows
Next Form Page	CTRL+TAB	all windows
Previous Form Page	CTRL+SHIFT+TAB	all windows

Shortcut Keys used in ERP Specific menu

The Specific menu contains form-specific commands. Two types of form-specific commands can be defined: common commands and specific commands.

Allocated shortcut keys

Frequently used common commands: CTRL+F1 through CTRL+F10
Specific commands: CTRL+SHIFT+ <i>letter</i> .

Predefined shortcut keys for frequently used common commands

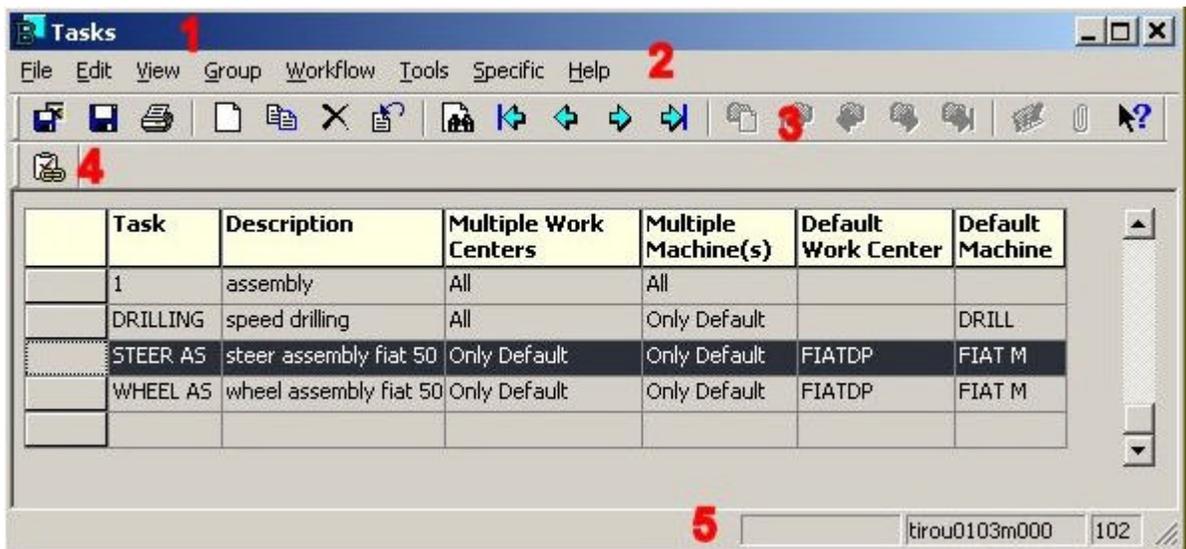
Menu label	Shortcut keys
Duplicate	CTRL+F1
Generate	CTRL+F2
Approve	CTRL+F4
Release to/ Transfer to	CTRL+F6
Process	CTRL+F8
Close/ Finalize	CTRL+F9
Move to History	CTRL+F10
Level Up	ALT+RIGHT ARROW

Level Down	ALT+LEFT ARROW
Predefined shortcut keys for frequently used specific commands	
Menu label	Shortcut keys
Lines	CTRL+SHIFT+L

The session window

The SSA ERP session windows contain some or all of the following elements:

1. Window title bar.
2. Menu bar.
3. Standard toolbar.
4. Application toolbar.
5. Status bar.



Window title bar (1)

The window title bar shows the session name, which reflects the type of object that the session displays. If the session displays a specific characteristic of the object, this is the second part of the title. For example:

- ✍ The **Items - General** session list the general item data.
- ✍ The **Items - Sales** session list the item data that is specific for handling sales orders.
- ✍ The **Items - Warehousing** session list the item data that is specific to item storage and inventory handling.

Menu bar (2)

The menu bar shows the menus that apply to the session.

You can display Help for menu commands as described in [To display What's this? Help.](#)

You can display more online Help as described in [To use Help.](#)

For a list of the menu commands, refer to [Standard Commands](#).

Note

- ✎ The **Group** menu is only available in a records-by-group overview session.
- ✎ The **Specific** menu contains the commands that are specific for the session. You can often use the **Specific** menu to start related sessions. If there are no session-specific commands, the **Specific** menu is not available.

Toolbars

The session window contains one or more toolbars:

- ✎ The standard toolbar (3).
- ✎ The application toolbar (4).

The standard toolbar is always present. The standard toolbar contains buttons for the standard commands of SSA ERP session windows. For an overview of the standard toolbar buttons, refer to [Toolbar buttons](#).

The application toolbar contains buttons for some of the session-specific commands that are also present in the **Specific** menu.

To display the command description in the tooltip or in the status bar, point to the command button.

To start a command, click the corresponding button. If there are no session-specific commands, the application toolbar is empty.

To display Help on the application toolbar buttons, first click the **What's This?** button as described in [To display What's this? Help](#) Help.

To change the position of the toolbars, on the **Tools** menu click **Options**.

You can temporarily change the position of the toolbars as described in [To move the toolbar](#).

Status bar (5)

The status bar at the bottom of the session window displays, from left to right:

- ✎ The description and the shortcut keys of the toolbar button, command button, or menu command that you point to.
- ✎ The mode and type of the selected field, or information about the current process, such as Busy or Ready.
- ✎ The session code, for example, tcibd0501m000. The first two characters, tc, indicate the package to which the session belongs. The next three characters, ibd, are the module code. Note that your user profile can be set up in such a way that the session codes are not displayed.
- ✎ The company number. The number of the current company, in which you are working. You can only process data belonging to the current company, and the data you define only apply to the current company. For details, refer to [To change the company number](#).

To change the windows settings

To change some of the windows settings, on the **Tools** menu click **Options**. This starts the **Options (ttams1100s100)** session, which you can use to:

- ✍ Select some window settings.
 - ✍ Select the way in which SSA ERP displays messages to you while you work with the SSA ERP sessions.
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To use the SSA ERP sessions

Overview session

You typically start a task from an [overview session](#). An overview session lists a single type of record and some of the record data. For details, refer to [To use an overview session](#).

Details session

If an overview session cannot display all the record data, a [details session](#) displays all the data. You can start a details session in one of the following ways:

- ✍ Double-click a record in an overview session.
- ✍ Create a new record. For details, refer to [To use a details session](#).

Zoom session

To select a record, you can usually start a [zoom session](#). When you return to the current session, the code of the selected record is entered in the field from which you started the zoom session. For details, refer to [To use a zoom session](#).

Example

- ✍ The **Sales Orders**[overview session](#) lists the available sales orders.
- ✍ When you double-click a sales order, the **Sales Orders**[details session](#) starts. This displays the details of one sales order, such as the customer, date, sales order type, and the terms of payment.
- ✍ To select the warehouse from which the order must be shipped, you can start the **Warehouses**[zoom session](#), browse through the available warehouses, and select one.

To enter a date

To enter a date, you can:

- ✍ Use the pop-up calendar.
- ✍ Type the date.

For details about the format in which the dates and times are displayed, refer to [Formats of dates and times](#).

To use the Calendar:

- ✎ Click the arrow behind the date field. A pop-up calendar appears that displays the current month. Today's date is marked in red. You can click the < and > buttons to display the previous and next months.
- ✎ On the calendar, click a date. The calendar closes and the date is entered in the field.

Tip

If the field displays a date in a different year from the required date, overwrite the year with the required year before you start the pop-up calendar. This saves you scrolling through 12 months for every year that you want to skip.

To type a date:

Enter a date or part of a date in one of the following ways:

- ✎ Enter a valid number. The current month and year are added automatically.
- ✎ To enter a date with a different month or year than the current date, you can enter two digits for the day, followed by two digits for the month, and two digits for the year. SSA ERP automatically adds the date separators set up for your system. For example, if you enter 032702, SSA ERP displays 03/27/02.

To enter a time

When you specify a date, also specify a time. SSA ERP uses one combined field for date and time. If you use the pop-up calendar to select a date, the date is followed by the default time which is either the current time or 12:00AM. To change the time, select the time in the **Date** field and type the required time over it. For details, refer to [To enter a time](#).

Example

In the following examples, the current date is 23 January 2002.

Enter	Result
27	01/27/2002 12:00AM
0327	03/27/2002 12:00AM
01141972	01/14/1972 12:00AM
042303	04/23/2003 12:00AM (year 2003)

To enter a time

When you specify a date you must usually also specify a time. SSA ERP uses one combined field for date and time.

If you use the pop-up calendar to select a date, the date is followed by the default time which is either the current time or 12:00AM.

When you enter a date, the date is followed by either the current time or the default time, which is 12:00:00 AM.

To enter a time

To change the default time, select the time in the **Date** field and type the required time over it.

You can enter one digit for hours and minutes under 10. If you enter hours followed by minutes, you must use a separator. Entered seconds are only displayed if the time formats that you selected in SSA ERP and in Windows both display seconds. For details, refer to [Formats of dates and times](#).

If you have selected a 12 hour format in the **Regional Settings** of the Windows **Control Panel**, hours between 12 and 24 are converted to the 12 hour format, followed by the selected AM and PM symbols to indicate the day part.

Example: To enter a whole hour

Enter	Result
12	12:00:00
9	09:00:00
11.5	11:05:00
18.45.5	18:45:05, or 6:45:05 PM

To use search keys

You can use search keys to add your own search and sort criteria for many types of records. For example, you can define search keys for:

- ✎ Items
- ✎ Business partners
- ✎ Projects

To enter a search key

You can enter search keys of up to 16 alphanumeric characters. SSA ERP converts all lowercase characters to uppercase. Any spaces you enter are part of the search key. The default search key consists of the first 16 characters of the **Description** field or the **Name** field.

To use the name as a search key

SSA ERP builds a default search key from the first 16 positions of the **Name** field. Periods and any characters that precede them are not included.

Example

M.Y. Dixon and Son becomes DIXON AND SON. J. Smiths l.t.d. results in a blank search key, because all the characters that precede the period at the end are ignored.

To sort records on a search key:

On the **View** menu, click **Sort**. Then, select the search key.

To find a record by using the search key:

1. Start the overview session that lists the records.
 2. If the session contains tabs, display a tab on which the search key field is shown.
 3. On the **View** menu, click **Sort**. Then select the search key.
 4. Follow the instructions in [To use Find](#).
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To sort the records

To sort the records, take the following steps:

1. On the **View** menu, click **Enterprise Server**. SSA ERP displays the available sort orders.
2. Select a sort order.

Note

In sessions with more than one tab, you can only select sort criteria for the columns that you can see on the current tab.

If you select a sort order with more than one criterion, the records are listed in the order of the first criterion and within that list, in the order of the second criterion, and so on.

If you apply a filter to the records, you can also specify a sort order. For details, refer to [Overview of filters](#).

Example

If you select the sort order A, B, C, the list order is:

A1	B1	C1
-	-	C2
-	-	C3
-	B2	C1
-	-	C2
A2	B1	C1

and so on.

To use Find

To find a record in an overview session, take the following steps:

- ✎ On the **Edit** menu click **Find**, or click the **Find** command button in a details session.

The **Find** dialog box is displayed. One or more fields show the code and/or other details of the first record that is listed in the session. The **Find** dialog box only shows the fields displayed on the current tab.

Select the sort order for the records. The fields that are shown in the **Find** dialog box also depend on the way the records are currently sorted.

Enter (part of) the code or value in at least one field. If you enter values in more than one field, SSA ERP searches for records that match all the criteria.

Find does not distinguish between uppercase and lowercase letters.

Click **OK** to start the search. When the search is finished, the **Find** dialog box is closed.

The first record found is the first record listed. If no records were found, the nearest matching record is shown.

Note

Sometimes the resulting list displays the last record found, or the next record. If the resulting list does not match the criteria, scroll up one or two records.

To use filters

To display a specific subset of records in an overview session, you can define a filter and apply the filter to the session. You can also define a sort order for the filtered records. For more information, refer to [Overview of filters](#).

Note

If **Filter** is not available on the **View** menu, you cannot apply a filter to the session.

To apply a filter:

1. On the **View** menu, click **Filter**. SSA ERP lists the available filters in a submenu.
2. On the submenu, click the filter to be applied.
3. Wait a few seconds while SSA ERP filters the records.

To remove the filter:

1. On the **View** menu, click **Filter**.
2. On the submenu, click **None**.
3. Wait a few seconds while SSA ERP redisplay the records.

To define a filter:

1. On the **View** menu, click **Filter**.
2. On the submenu, click **New**. The **Filters (ttadv9593m000)** session starts.
3. Type a name for the filter in the **Filter Name** field.
4. Click **New** to add a condition to the filter.
5. In the **Field Name** field, select the field for which you want to specify a condition. You can only select a field that is visible on the current tab of the overview session.
6. In the **Condition** field, select a condition operator. For an explanation of the operators, refer to [Operators used in filters](#).
7. In the **Value** field, enter the value to which you want to compare the contents of the selected field. If the possible values of the field are predefined, you can press CTRL+B to select a value.

If the value is alphanumeric, you must enter uppercase and lowercase characters exactly as they appear in the overview session.

The wildcard character combination **.*** represents any number of any characters. If the condition is **contains**, or **doesn't contain**, the value must include the wildcard characters **(.*)**. If the condition is other than **contains**, or **doesn't contain**, the value cannot include the wildcard characters **(.*)**.

Repeat steps 4 to 7 for every condition of the filter. If you want to save the filter for future use, click **Save**. On the **Specific** menu in the **Filters (ttadv9593m000)** session, click **Apply** to apply the filter.

To edit an existing filter:

1. On the **View** menu, click **Filter**.

2. On the submenu, click **Edit**. The **Filters (ttadv9593m000)** session starts and displays the selected filter. To display the filter that you want to edit, you can click **New Group** and **Previous Group**.
3. To add conditions to the filter, click **New**.
4. To change an existing condition, double-click the condition and make the required changes.
5. To remove a condition, select the line and click **Delete**.
6. If you want to save the changed filter for future use, click **Save**.
7. On the **Specific** menu in the **Filters (ttadv9593m000)** session, click **Apply** to apply the filter.

Examples of conditions in filters

In the following examples, the displayed addresses are the records that are displayed in the overview session if you apply the filter.

Session	Addresses (tccom4530m000)	
Field Name	ZIP Code/Postal Code	
Condition	Value	Displayed addresses are all the addresses of which the postal code:
is (exactly)	7330 AC	is 7330 AC
equals or after	7300 AA	is 7330 AC or greater
equals or before	7999 ZZ	is 7999 ZZ or less
is after	7330 AC	is greater than 7330 AC
is before	7330 AC	is less than 7330 AC
is not	7330 AC	is different from 7330 AC
in	7330 AC,	is 7330 AC, 7335 KB, or 7364 ML
	7335 KB,	
	7364 ML	
not in	7330 AC,	is not 7330 AC, 7335 KB, or 7364 ML
	7335 KB,	
	7364 ML	
contains	AA.*	contains AA
doesn't contain	AA.*	does not contain AA

To specify the sort order

If you create or edit a filter, you can add a sort order for the filtered records. To specify the sort order of the filtered records, take the following steps:

1. On the **Specific** menu in the **Filters (ttadv9593m000)** session, click **Define Sort Order**. The **Define Sort Order (ttadv9193m001)** session starts.
2. In the **Field Name** field, click the browse button and then select the first field on which you want to sort the records.
3. In the **Order** field, select the order, which can be **Ascending** or **Descending**.
4. Repeat steps 2 and 3 to specify subsequent sort fields. SSA ERP sorts the records in the order of the first field and within that list, in the order of the second field, and so on.
5. To save the sort order for the filter, click **OK**.

If you apply the filter, SSA ERP sorts the records in the specified order.

Note

If there are many records, sorting the records can take some time.

To set up a default filter:

1. On the **View** menu, click **Filter**.
2. On the submenu, click **Edit**. The **Filters (ttadv9593m000)** session starts and displays the currently selected filter. To display the filter that you want to set up as the default, you can click **New Group** and **Previous Group**.
3. On the **Specific** menu in the **Filters (ttadv9593m000)** session, click **Set as Default**.

To delete a filter:

1. On the **View** menu, click **Filter**.
 2. On the submenu, click **Edit**. The **Filters (ttadv9593m000)** session starts and displays the selected filter. To display the filter that you want to delete, you can click **New Group** and **Previous Group**.
 3. On the **Specific** menu in the **Filters (ttadv9593m000)** session, click **Delete Filter** to delete the filter.
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To print a document or a report

To print a document or a report, take the following steps:

1. On the **File** menu, click **Print**, or click the **Print** command button of a details session.
2. If SSA ERP displays a list of the available document types, select the document type that you want to print. The **Print** session starts.

3. Enter the record ranges that you want to print in the **From** and **To** fields.
4. Select the appropriate options and check boxes. Consult the field Help for information about each field or check box.
5. If the **Print** session has more than one tab, fill out the fields on all the tabs as appropriate.
6. Click **Print** or click **Continue** to start the **Select Device (ttstpspopen)** session. For details, refer to [To select a print device](#).

To save the default values

If you often print the same types of reports, click **Save Defaults** to save the current values of the **Print** session fields. When you start the same **Print** session later on, you can click **Get Defaults** to insert the default values.

To print at a specified date and time:

Do one of the following:

- ✎ On the **Tools** menu, click **Make Job** to create a [Job](#). For details, refer to [To use jobs](#).
- ✎ In the **Select Device (ttstpspopen)** session, specify the print date and time. For details, refer to [To select a print device](#).

The document layout and format

The system manager defines the document layout and format by using the sessions of the **Application Administration** module in **Enterprise Server**.
