



JONAS METALS SOFTWARE



DMS 5.10 Operational Changes

May 18

2021

This document contains brief descriptions of operational changes made to the Document Management system for the 5.10 release. Last change 6/28/2021.

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Summary of Changes

- A template file may now be defined for each System/Type in DMS. This is a default file that can be automatically added to DMS by a user when they are looking at documents.
- A default “Doc/No Doc” message can be defined in the Control file, and a default window title can be defined in the System file. Since DMS can use the screen entities defined in the Program Screen Definition file that is part of utilities, DMS can now be run without having to setup a Program Interface for each program. This requires that the System file is linked to an entity.
- A new program (DMHKDD) has been added that will allow the user to set up a hotkey to display a certain System/Type document if the entity related to the system is displayed on the current screen.
- The “Doc/No Doc” message can now be displayed using any available font attribute (inverse, blink, bold, or underline).
- The System and Type Maintenance programs now don’t allow changes to the key fields, and they check for usage before they allow deletions.
- The directories are now validated if they don’t contain wild cards.

Template for new documents

A template function allows an easy way for new documents to be added to the system that require a specific layout. The file can be used to create a default document that can then optionally be edited.

The template needs to be added in the Document Types file. The file must already exist and it should be one of the standard file types set up in the External Document Types file.

When you then hotkey to the DMS Interface program (DM010) there is a ‘neW’ option that allows you to choose from all the document types that have a template defined. Once the document type is selected, the program copies the template file and attaches it to your selected document (e.g. a resale ID for a customer). The document is pulled up automatically so the user can edit the document with the specific changes.

Changes to the Doc/No Doc messages

A default message can be defined in Control

A message when documents exist or do not exist prints on the screen when an entity is displayed. Usually this message prints on the 3rd line of the screen on the right-hand side. In the past, each Program Interface that was defined had to specify what was printed; this can now be defined in the Control file.

Attributes of the message can be defined

Before, the attributes of the message were either bold or dim. You can now set the message to any of the attributes defined in the terminal emulator. The available colors and attributes are displayed on the screen.

Window title for documents

The Program Interface is where you can define the title for documents. This field in the Program Interface can now be left blank and defined once in the Document Systems Maintenance. For example, the “CS” system might be “Customer” and the “SO” system might be “Order”. When the system is selected, the window title will then say “Documents for Order: xxxxxxx”.

Display a document for an entity directly with a hotkey

You can see DMS documents via a hotkey, but have to select the category first, and then select the document. A new hotkey can be set up that will look directly for a particular DMS type for a specific entity that is displayed on the screen and show the first document it finds. For example, if a vendor is displayed, you can hotkey directly to pull up the contract for that vendor. A hotkey needs to be set up for each document type you want to view. See the “Hotkey to view an entity directly” help below under the Setup category for how to accomplish this.

Setup

DMS Control Maintenance

Set up the Doc Msg Row, Column, Message, and Color in the Control file so that it does not need to be entered for every Program Interface entry unless the program needs to be different. This is the “Doc” or “No Docs” message that prints (usually on row 3) in interfaced programs.

DMS System Maintenance

Enter the Document Title for each system so that it does not need to be entered for every Program Interface entry. This is the message that prints as the window title where the documents are displayed. For customers (system “CS”), the Document Title would be “Customer”. For system “SO” the Document Title might be “Order”.

Program Interface Maintenance

You no longer need to set up each individual program in the DMS Program Interface if the DMS System is defined with an entity and that entity is defined in the Program Screen Definition file. To use this feature, make sure that you have a default message defined in the DMS Control file, and be sure you have the document title defined in the DMS System file. You can also leave an entry in this program if you just need to override a default, but you should be able to leave the majority of the record blank.

Hotkey to view an entity directly

A new hotkey can be set up that will look directly for a particular DMS type for a specific entity that is displayed on the screen and show the first document it finds.

To set this up, do the following:

1. Make sure the entity is defined in Document Systems.

```

DMFMSY                      Jonas Metals Metal Comp
Rev  5.10.00                 Document Systems

      System Code: VN
      Description: Vendor
All Users Valid: Y  Allowed Users:

      Related File: VENDOR
      Related Index: VENDNO.IX
      Look Up Key 1: VENDNO.IX      Size:  4  Type: N Entity: 10101 Vendor
      Look Up Key 2:                Size:    Type:  Entity:

      Field Name      Beg Byte  Size Type Index
      -----
      Vendor          3          4 N   VENDNO.IX

```

2. Verify that the programs from which you want to display documents are defined for the above entity. Use the Program Screen Definitions program on the Utilities Auxiliary Menu.

```

CCFMPS                      Program Screen Definition Maintenance
Rev  7.00.00

Program Name: AP930      Open Invoice Inquiry
      Entity:      10101 Vendor

      Row:  4      Ending Row:
      Column: 12
      Length:  9

```

3. Add a hotkey for this function.

```

UTFMHK                      Hotkey Programs Maintenance
Rev  7.00.00                 Hotkeys for 'DEFAULT'

Display Order: 23      Program: DMHKDD CNTRC 10101
      Description: Show Vendor Contract

      Program Type: B

      Close/Reopen Files: N

      Save/Restore Screen: N

      Assigned to HOTKEY:  9

      Don't Run if Active LOCKs: N

```

- a. The Program field should contain the program (DMHKDD) followed by the Document Type (CNTRC) followed by the Entity (10101).
- b. When this is setup, and the user hits the assigned HOTKEY (if any) or selects this option from the hotkey menu, DMS will look to see if the system code (in this case Vendor) is displayed on the current screen and it will look to see if there are any documents of the defined type (in this case CNTRC). If there are, it will display the first one it finds. If the code is not on the screen or there aren't any documents for the type, nothing will happen.