Check this table of contents for the **task you need** – then go to that section for the steps

**Application Menu Bar**    **Desktop for form windows**
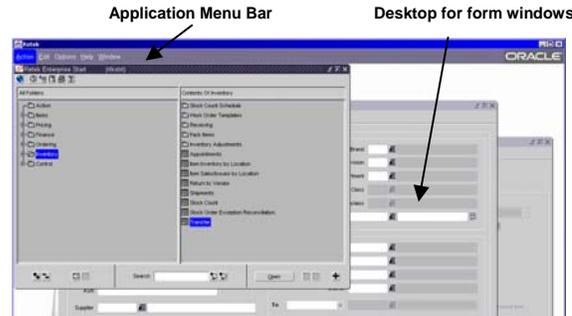
## Getting Started with RMS  1

### The RMS Application Layout

The RMS Web-based application has a menu bar at the top and a "desktop" area beneath to display the data form windows.

### The RMS Application Menu Bar

The RMS menu bar is context sensitive. Certain menu options change depending on which form is active.

Action  Edit  Options  View  Help  Window

| Menu | Function |
|------|----------|
| Action | Provides the application Close option. |
| Edit | In addition to the standard Cut, Copy, Paste options, **Edit** opens a text editing window for text fields. **List** opens a LOV dialog. |
| Options | Changes with each form, providing the opportunity to enter additional information. |
| View | Provides display options for forms with multi-view tables. |
| Help | Lists the online help options. |
| Window | Lists open windows so you can easily switch between them. |

### RMS Data Forms

RMS data is displayed in a variety of forms. Each form opens in its own window.

There are forms for searching, data entry, data display, and scheduling events. Many forms combine more than one of these functions.

Forms are stored in a hierarchical folder structure organized by function and/or type of information.

The primary access to forms is through the *Retek Start* window, which functions like the *Windows Explorer* file window. (See section 2.)

### How do I log in to RMS?

1. From *Internet Explorer*, in the address field, type the URL below and press Enter.

   http://rms-production.gap.com

2. In the *Log in* window, enter your username and password. Click OK.

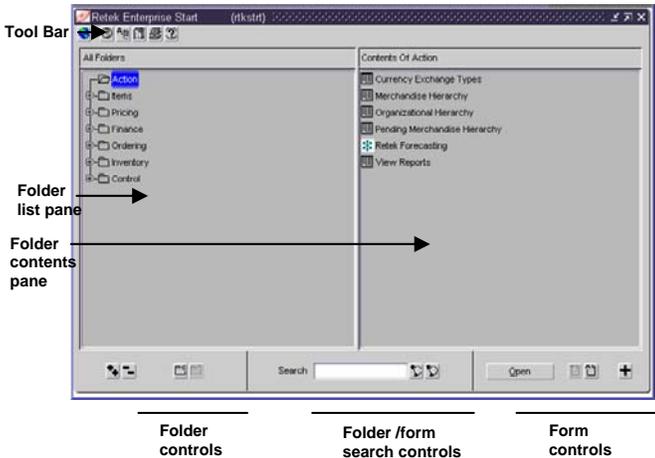3. The application opens with the *Start* window displayed.

## 2   *Opening Forms Using the Start Window*

### The Retek Enterprise Start Window

The *Start* window provides immediate access to all forms. It is the only window displayed when RMS is started.

Depending on the permissions associated with your user access, you will see some or all of the available folders and forms.



Tool Bar

Folder list pane

Folder contents pane

Folder controls     Folder /form search controls     Form controls

### How do I navigate through the folders?

The *Retek Start* window uses the same conventions as the *Windows Explorer* window.

Folders may contain other folders or forms. Only folders appear in the folder list pane. Both folders and forms can appear in the contents pane.

| To: | Do this: |
|---|---|
| Open a folder | In the left pane, click the closed folder icon. In the right pane, double-click the closed folder icon. |
| Open a folder and its immediate subfolders | Double click the closed folder icon. |
| Close the hierarchy of subfolders below a folder | Double click the open folder icon. **Note**: This is referred to as "collapsing the hierarchy." |

### How do I search for specific folders or forms?

Search

1. In the *Search* field, type part of the name you are searching for.
2. Click the left-hand search button to search forward (toward the bottom of the file hierarchy) from the currently selected folder.

   OR

   Click the right hand button to search backward from the currently selected folder.

   Both folders and forms containing the search text will be highlighted. If necessary, the folder hierarchy is automatically expanded to display the search target.
3. Repeat as necessary to locate the folder or form.

### How do I open a form?

1. Double click the associated form icon.

Typically, this opens a search form for the selected function.

If the icon is named *New*, *View* or *Edit*, then a form opens at the selected access level.

### The Folder Controls

| Control | Function |
|---|---|
| | Expands the currently selected folder to display all subfolders. |
| | Collapses the currently selected folder. |
| | Adds a user-created folder to the end of the hierarchy. |
| | Deletes the selected user folder. |

### The Form Controls

| Control | Function |
|---|---|
| Open | Opens the selected form. |
| | Adds URL of external application to user folder. |
| | Removes URL from selected user folder. |
| | Creates form shortcut on Menu Bar. |

## You can customize RMS in three ways:

1. Add folders to the *Start* window with links to other Web based applications such as Crystal Reports and GapWeb.
2. Add buttons to the toolbar to directly launch selected forms.
3. Create custom views of forms tables to display selected data.

### How do I add an "open form" button to the toolbar?

1. Use the navigation controls to display the form in the *Contents* pane.
2. Select the form.
3. Click Add favorite ✚.
4. In the *Add a Toolbar Favorite* window, select a button image by clicking it.

### How do I manage the buttons I create on the toolbar?

1. From the *Options* menu, select Edit toolbar.
2. In the *Edit Toolbar Favorites* window, you have the following options:

| To: | Do this: |
|---|---|
| Delete a button | 1. Select the icon. <br> 2. Click Remove. |
| Rename the Tool Tip | 1. Select the icon. <br> 2. Click Rename. <br> 3. Type the new name. **C**lick OK. |
| Add a space between buttons | 1. Select the icon you want the space to be *to the left of*. <br> 2. Click Space. |

3. When finished making changes, click OK.

### How do I add a "user folder" to the Start window?

1. At the bottom left of the *Start* window, click Add user folder 📁.
2. In the *Folder Name* field, type a name, click OK.

### How do I remove a "user folder"?

1. Select the folder.
2. At the bottom left of the *Start* window, click Remove user folder 📁.

### How do I add a link to other applications in my folders?

1. Open the folder by clicking it.
2. Click Add user element 📄.
3. In the *Add User Element* window, type the complete URL of the application starting with "http://…", a name, click OK.

### How do I remove a link to an application from a user folder?

1. Open the folder by clicking it.
2. In the *Contents* pane, select the element.
3. Click Remove user element 📄.

## 3   *Customizing RMS … continued*

### Custom tables available in some forms

The tables in certain forms are "multi-view". Multi-view tables can be customized in a variety of ways. The custom view is only available while the form is open, but it can be saved for future use.

There is only one saved view per form for each user. You can't share your saved view with another user.

> ⓘ **Tip:** The *View* menu only displays if the currently active window contains a multi-view table.

### How do I select a view?

1. Open the form.
2. If necessary, use the Search function in the form to display the data table.
3. In the *View* menu, select Saved to view the previously saved custom view or Default to view the default view.

### How do I create a custom view of a table within a form?

1. Open the form.
2. If necessary, use the Search function in the form to display the data table.
3. In the *View* menu, select Custom.
4. In the *Customize* toolbar, select the option(s) to change the table display, as described in the table to the right.
5. If you want to save the result, click the Save button.

If you don't save it, the changes are lost when you close the form window.

> ⓘ **Warning:** The tables in form windows have a fixed width.
>
> You cannot add a field column that does not fit within this fixed width. If you try you get an error message. In such cases, remove a field, or adjust the width of existing fields to accommodate the column.

### Multi-view Table Customization Toolbar



| Button | Function |
|---|---|
| ◀◀ ▶▶ | Scrolls visible fields during edit mode. |
| ◀▯▶ ◀▯▶ | Narrow/widen selected field by one character. |
| ◀▯ ▯▶ | Shifts the selected field left/right. |
| ✖ | Deletes the selected field from the table (you can add it back in with the button below). |
| ✚ | Opens the *Customize* window in which you can select/deselect available fields. |
| ab̲I | Opens the *Change Header* window. Either:<br>• Type a new header name. Click OK.<br>• Click Default to reset the header name. |
| 🔎 | Opens the *Search* window to search for data values within the selected field:<br>• For a text field: type the text, select Match case, Search from first row if desired, click Search.<br>• For a numerical field: type the min/max values, select Search from first row if desired, click Search.<br><br>Each click on Search displays the next matching record, if there is one. When there are no more matches, a message is displayed: *The Search found no match*. |
| 💾 | Saves the changes in the "Saved View" for future use. |

### Data Entry Methods

Data values may be entered in a variety of ways:

- Text values typed directly into text fields.
- Text values selected from drop-down lists.
- Text values selected from *List of Value* (LOV) window.
- Dates selected from pop-up calendars.

You should be very familiar with the first two options.

The controls for the last two options are described on this page.

### The List of Values (LOV) window

Certain text fields have an associated LOV ▤ button, initial

search field and sometimes a Comments ☺ button.

| Item | | CLASSIC FLAT KHAKI | ☺ |

**Text entry field**        **Initial search field**

1. If you know the exact value, you can type it directly in the text entry field.

2. To search for a value before opening the LOV, type search text in the *Initial Search* field.
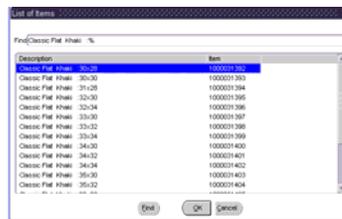
**LOV window**

3. Click ▤ to open the *LOV* window. For certain fields with lots of records, e.g., Item Description, this can take some time.

4. Once the *LOV* window is open, in its *Find* field, type search text to narrow the values displayed in the list. (The *Find* field is automatically selected for your input.)

    Clicking ☺ opens a small text editor for more extensive text entry.

5. In the list, select a value. It will then populate the text entry field.

### The Date Entry Calendar

Date fields have an associated calendar 🗓 button.

| Create Date After | | 🗓 |

1. To open the *calendar* window, click 🗓.

2. Use ◀ ▶ and the month and year drop-down lists to select the monthly calendar.

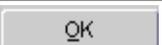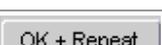3. To populate the *date* field, click the desired date.

    The calendar will not display illegal dates (e.g., a PO creation date before the current date).

**Date Entry window**

### Form Buttons

The following buttons are commonly found on forms.

| Button | Function |
|---|---|
| Add | Adds a blank record for data entry. |
| Back | Redisplays a search form with previous entry intact for further editing (not all search forms have this option). |
| Cancel | Closes the form without accepting changes. |
| Close | Closes the form and accepts and saves all changes. |
| Delete | Deletes the currently selected record. |
| OK | Closes the form and accepts and saves all changes. |
| OK + Repeat | Accepts and saves all changes and clears the form for adding a new record or editing an existing record. |
| Refresh | Clears the form fields for entry. |

## 4 | *Entering Data … continued*

**The Form Tool Bar: Every form shares the same standard tool bar at the top.**

| | | | | | |
|---|---|---|---|---|---|
| Opens a new Retek Enterprise Start window. | Opens an Internet address field: Type a valid URL and click **Go** to open the Web page in a separate browser window. | Activates translation of the current field into any of the supported languages (Not currently active). | Opens a window from which you may select a report. (Not currently active) | Prints a screen shot of the active window. | Opens the Online Help file for the active window. |

## 5 | *Using Search Forms to Find Information*

### Search Forms

Many forms first open as a search window. You enter or select the search criteria, click Search and the form changes to a table displaying the search results.

Some forms combine a search section and a results section.

Search criteria fields employ text fields, drop-down lists, LOV fields and date entry calendars.

All search criteria is additive: only results that match all the criteria are displayed.

### How do I use a search form?

1.  Open the form.
2.  From the *Action* drop down list, select an action. One or more search criteria fields become available.
3.  Enter or select the appropriate search criteria.
4.  Click Search. In some cases the form changes to a results table.
5.  In the results table, select the desired record.
6.  Either:
    - Click OK to display the record.
    - Click Back to return to the search form keeping the same criteria (not all search forms have this option).
    - Click Refresh to return to the search form with all criteria fields cleared.



**Search form**



**Results form**

## RMS Online Help is similar to Windows Help

The RMS Online Help always displays in a separate browser window. It is organized like Windows help into two vertical panes.
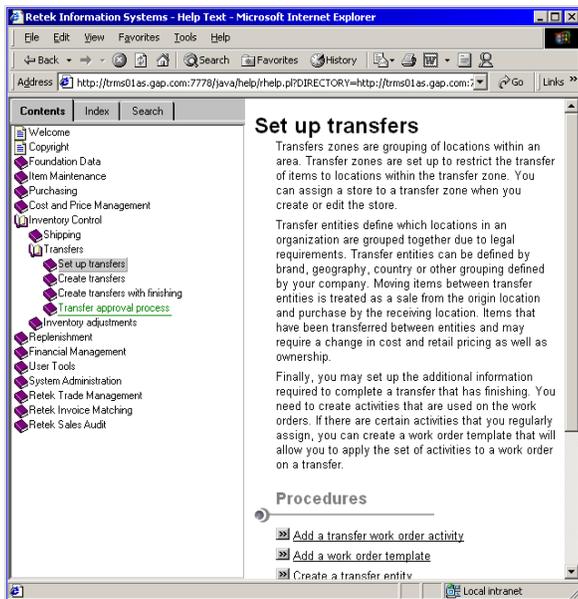
The left pane has tabs for a table of contents, index and a search function. The right pane contains the help topic text.

Long help topics have links near the beginning to the subtopics within the main topic, such as procedures and field descriptions.

**Left pane:**
- Contents
- Index
- Search

**Right pane:**
Help topic text



**RMS Online Help**

## How do I access RMS Online Help?

There are two ways to access the online help system:

1. From the *Help* menu, select an option.

| Option | Result |
|--------|--------|
| Contents | Opens to the *Welcome* page. |
| Window Level | Opens to the page that describes the currently active form window. |
| Display Error | Certain serious errors display a distinctive error message. When these errors occur, click this option and a window providing additional information will appear. Screen print this window to aid support personnel in diagnosing the error. |
| Show keys | Displays RMS keystroke shortcuts for the active window. |

2. Clicking ⬚ on the form Toolbar opens the help page describing the active form window.

> ⓘ **Tip:** The most efficient way to access form-specific help is by clicking ⬚ in the form Toolbar.

## 7 Exiting RMS

### How do I exit the application?

Closing the last open window closes the application.

*Some form windows close with a* Close *button, some with an* OK *button.*

You should either click the Close button or OK button in form windows.

To close the *Retek Enterprise Start* window, from the *Action* menu, select Close.

> ⓘ **Warning:** To save current data entry in a form window, you must click the Close or OK button, as appropriate. Closing a form window by clicking Close in the application *Action* menu will **not** save the current data entry.