Infor Smart Office: Getting Started

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Agenda

- A Quick Anatomy Lesson
- Help
- Settings
- Widgets
- Launching Forms
- Creating Shortcuts

- Adding Favorites
- List Driven
- Jobs & Reports
- Bookmarks
- Personalizations
- Toolbox
Pieces and Parts of Smart Office

Titlebar

Taskbar

My Family

Widget

Info Browser

Canvas

Shortcut

Chat

Sticky Note

Folder
Tutorial Videos & Help

• Watch the Videos
• Search the Companion
• Learn the Hotkeys
Smart Office Settings
Lawson Transaction Settings

- Many great features are controlled via settings
- Initial/Global settings are set at roll-out time
- Users will want to tweak settings for themselves
Widget Library

To Add a Widget to your canvas:

• Click, Drag and Drop
• Double Click
• Click Widget and click “Add to Canvas” button

To Filter the List of Widgets:

• Click the Dropdown List
Launching Forms

1. Start Field in the Titlebar
2. Start Field in the Navigator Widget
3. Navigate the hierarchy in the Navigator Widget
Creating Shortcuts

1. Click, drag and drop apps from the taskbar
2. Click, drag and drop apps from the Navigator Widget
3. Right click on the canvas*
4. Select Bookmarks > “Create Canvas Shortcut” from the Tools menu on an S3 form (not pictured)

*Requires knowledge of form syntax
Adding Favorites

1. Right click on an app in the taskbar
2. Right click on an app in the Navigator Widget
3. Right click on canvas shortcuts
List Driven

- Old style select multiple keys vs. filter and multi-select records
- Add, remove, change order, change column description …
- Save personalized views
List Driven: Settings

- Enable Lists
- Delay List Retrieval
- Exclude Forms
List Driven: Work Lists

1. Filter to get the desired values
2. Shift or Ctrl select the records
3. Right click and select “Launch … form”

Work Lists allow you to quickly navigate to specific records to perform maintenance.
List Driven: Personalized Data Views

1. Filter to get the desired fields
2. Select to add to the view
3. Drag and drop to rearrange
4. Click in Label field to change the description

Add and personalize columns to your views to enhance your ability to filter specific records.
List Driven: Save Data View

1. Select “Save Data View As…” from Personalization under the “Tools” menu
2. Give the View a name
3. Select the View from the dropdown in the Toolbar

Save Data Views for often-used queries to speed record selection
List Driven: MS Office Integration

1. Select the desired output from "Export List" under the Tools menu
2. Work with the output in the native application
3. Save or send the output
• Current Record
• Canvas Shortcut
• Canvas Shortcut to the current record
• Copy to Clipboard
• Copy External Link to Clipboard
Getting started with Personalizations

- New View…
- Form Properties
- Default Values
- Edit Labels
- Show/Hide Fields
- Required Fields
Personalizations: New View

- A View is a container for a set of personalizations
- Any personalizations should start with a new view
Personalizations: Form Properties
Personalizations: Default Values

Embedded BI: Accounting Units - Accounts - APPS901/GL20.1 Default Values

Set Default Values
The created default values are presented in the list. To create a new default value for a field, click New. To edit or copy an available default value, select it from the list and click Edit or Copy.

Default Values
Select the field and default value type. Then, if available, choose an item in the list.

Finalize And Save Default Value
Enter an optional description for the default value. Click Finish to save the default value.

Description: Company 1
Field: Company - GLN-COMPANY
Type: Literal
Value: 1
Personalizations: Edit Labels

Embedded BI: Accounting Units - Accounts - APPS901/GL20.1

Edit Labels

Manage Views...
New View...
Save Data View As...
Select
Form Properties...
Conditional Styles...
Shortcuts...
Default Values
Edit Labels
Edit Tab Order...
Show/Hide Fields
Required Fields
Browser Tabs...
Scripts...
Export...
Import...

Person Responsible
Type
Status
Chart Section
Account Template
Account Currency
Organization
Department/Region
Hospital Entity
Levels
Address
User Fields
Parent Accounts
Reports
Personalizations: Show/Hide Fields
Personalizations: Required Fields
Form Toolbox: Open/Close

Click on the section between the small grey triangles to open or close the toolbox.
Form Toolbox: Shortcuts

Click the “+” to add a shortcut to the toolbox area.
Form Toolbox: Shortcuts

- Use Headings
- Organize in groups of like shortcuts
- Add shortcuts to Form Views
- Use Links for passing values to other forms
- Use links to open BI content
Questions?

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- Toolbox
Don’t forget to check out the Infor Lawson Tech Blog:
http://blogs.infor.com/s3tech

Other Related Sessions

- TECI-2004: Getting the Most Out of Infor Smart Office for Lawson Customers
- TECI-2005: Implementing Infor Smart Office for Lawson Customers
- TECI-2006: Getting Started with Scripting for Lawson forms in Infor Smart Office
- TECI-2018: Infor Smart Office Administration
- TECIC-2678: LSO Implementation At H. Lee Moffitt Cancer Center
- TECIC-2682: Customizing Lawson Forms