



TIP OF THE MONTH



MANAGING APPLICATION SETTINGS

Using 'Manage Application Settings' within Formpak

You can manage application settings, including information shown on the home page of the software, default currency, default unit of measure, if duplicate Items are allowed in formulations, treat Raw Materials as Formulations, and many other settings.

Automatic Processing	Manage Links of Home Page
Poison Centre Notifications	Composition Development
Printing	Composition Explosion
Produce Samples	Costs
Projects and Tasks	Cross References
Property Calculation	Document Options
Property Calculation Options	Documents
Security	Email
Session	Formulation Management
Suitability Checking	Help Index
Uploads	Jasper Server Integration
User Interface	

Use the drop-down menu to select the relevant topic. Make any changes and select 'Save' once completed.

Be cautious when changing application settings, depending on the setting it can have an impact on your systems performance. If you require advice on changing application settings, please email support@formpak-software.com

Cross References

Cross Reference behaviour in Projects and Tasks are controlled by the below application settings.

Setting	Description	Value
When generating Cross References from a Project or Task Add Primary Party only		<input checked="" type="radio"/> Yes <input type="radio"/> No
When generating Cross References from a Project or Task Add Delivery Party only		<input checked="" type="radio"/> Yes <input type="radio"/> No
When generating Cross References, in Name Cross Reference show value of item project property		XREFNAME

The behaviour is if any Item has existing Cross Reference(s) the system populates the existing Cross Reference(s), showing:

The Newest Cross Reference (based on creation date order) and shows it as selected.

Any other Cross Reference(s) underneath as possible options to select, and it is sorted in creation date order (newest first) A User can optionally select a different Cross Reference and a User can also remove a selected Cross Reference.

Additionally, there has also been a change to Cross Reference Permissions within a Party Class. This is to enable stricter restrictions to Users/Roles

Manage a User's Permissions on Parties - TEST (DB2 V10.5)										
Please select the conditions for Parties which the user (CHERYL) will be permitted to perform										
Party Class	Description	Create Allow - Inherit	View Allow - Inherit	Instant Search Allow - Inherit	Update Key Details Allow - Inherit	Update Contacts Allow - Inherit	Update Related Parties Allow - Inherit	Update Account Managers Allow - Inherit	Update	Allow
Customers[PC01]	Test Description	<input type="checkbox"/> - <input checked="" type="checkbox"/>								
Supplier[PC02]		<input type="checkbox"/> - <input checked="" type="checkbox"/>								
Target Organisation[PC03]	ca02	<input type="checkbox"/> - <input checked="" type="checkbox"/>								
Party Group[PC04]	change	<input type="checkbox"/> - <input checked="" type="checkbox"/>								

The Permissions changes are in Manage a User's Permissions on Parties and Manage a Roles Permissions on Parties.

Make sure Users have permission on Party Classes to 'Create' 'Modify' and 'View' Cross References for the relevant Party.

Attachments	Create Cross References Allow - Inherit	Update Cross References Allow - Inherit	View Cross References Allow - Inherit	View Proj Allow - In
<input type="checkbox"/> - <input checked="" type="checkbox"/>				
<input type="checkbox"/> - <input checked="" type="checkbox"/>				
<input type="checkbox"/> - <input checked="" type="checkbox"/>				
<input type="checkbox"/> - <input checked="" type="checkbox"/>				

Cross Reference behaviour in Instant Search is controlled by the below application settings to enable Instant Search on Cross References, and to display Companies.

Always do Instant Search on Cross References	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Companies in Instant Search on Cross References	<input checked="" type="radio"/> Yes <input type="radio"/> No

Mini Tip

Instant Search for Item in CDT includes Item Class Filter.

The Instant Search now has the functionality to filter Items by Item Class in the Composition Design Tool (CDT) when searching for Items. Each User can set their own default settings for the required Item Classes as well as the Deep Search.

The screenshot shows the 'Add a New Formulation' interface. The main window displays 'Floral Fragrance' with properties like Mode (Edit Mode), Yield (100%), and Total Price (EUR). Below this is a 'Composition' table with columns for Seq, Code, Name, Concentration, CAS Number, and EC Number. A dialog box is open in the foreground, titled 'Select which Item Classes to show in Instant Search:'. It contains a list of item classes with checkboxes: 'Fragrance (P)' (checked), 'Fragrance Raw Material (A020)', 'Fragrance Raw Material, (A021)', and 'Fragrance Raw Material, (A00)'. The dialog also has 'Save Default', 'OK', and 'Cancel' buttons.

Select Item Class in the Instant Search and a box will appear. Select the relevant Item Classes to show in the Instant Search so only materials which are in the selected Item Classes will appear in the Instant Search.

Select Save Default and only Items from the selected Item Classes will appear every time Instant Search is used in the CDT. The below message will appear select Yes and the Item Classes and Deep Search setting will be saved.

