MRI Web Design
Operational Training Guide

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Course Overview

Introduction

Welcome

Welcome to the Web Design training. This course was designed to familiarize participants with the basics of creating Web pages in the Web Design application.

This course uses lecture, demonstration and hands-on exercises to teach the concepts and tasks to perform when using the MRI Web Design application.

What is Web Design?

Web Design is a tool that enables MRI users to edit the web pages in MRI for Web. It also gives the ability to create new pages and add new fields to the MRI for Web Interface

What Will You Learn?

In this training, you will learn the following main objectives:

- Understand the Web Design and MRI for Web Interfaces and how they interact
- Understand the MRI Table Structure
- How to create Activity Groups and Pages and link them together
- Understand the Menu Structure of MRI for Web
- Understand how to Web Enable a Report

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Who Should Attend?

The ideal participants for this training include:

IT personnel	Project Managers

Course Outline

A typical training day goes from 9:00 a.m. – 5:30 p.m. with the following breaks:

1st break:	10:30 a.m. – 10:45 a.m.
Lunch	12:00 p.m. – 1:00 p.m.
2nd break	2:30 p.m. – 2:45 p.m.

Below is the course outline broken down by modules and lessons:

Web Design Training	
Module 1: Database Schema Overview	Lesson 1: Understanding the MRI System Table Structure
	Lesson 2: Understanding the CM and RM Table Structure
	Lesson 3: Understanding the GL Table Structure
Module 2: Getting Started in Web Design	Lesson 1: User Interface
	Lesson 2: Components of MRI for Web Interface
	Lesson 3: MRI Web Structure
	Lesson 4: User Interface Components
	Lesson 5: MRI User Interface and Database
Module 3: Creating a Report	Lesson 1: Creating Activity Groups and Pages
	Lesson 2: Copying Activity Groups and Pages
	Lesson 3: Divs and Spacers
	Lesson 4: Adding Secondary Segments
	Lesson 5: Adding Total Breaks

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Module 4: Objects in Web Design	Lesson 1: Object Properties
	Lesson 2: Adding Objects to Pages
	Lesson 3: Setting Tab Order on a Page
Module 5: Grid Objects in Web Design	Lesson 1: Creating a Grid
	Lesson 2: Adding Command Buttons to Insert and Delete Grid Rows
	Lesson 3: Adding a Dropdown List to a Grid Column
	Lesson 4: Setting Default Values in a Grid
	Lesson 5: Adding a Calculation Field to sum a Grid Column
Module 6: Creating a Selection/Lookup Page	Lesson 1: Creating a Selection/Lookup Page
	Lesson 2: Setting Up Search Fields
	Lesson 3: Setting Up the Grid to Use Search Fields
	Lesson 4: Setting Up the Search Button
	Lesson 5: Setting Up the Hyperlink
Module 7: Linking Pages in MRI Web	Lesson 1: Creating Links to Pages
	Lesson 2: Creating a Frame
Module 8: Setting Up MRI for Web Menus	Lesson 1: Creating Activity Group Menus
	Lesson 2: Editing the Master Menus
Module 9: Web Enabling a Report	Lesson 1: Setting up Custom Report Options in Web Design
	Lesson 2: Making Reports Available through MRI Web Interface
	Lesson 3: Web Enabling a Report

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Module 1: Database Schema Overview

Purpose

The purpose of this module is to provide you with an understanding of the MRI database schema.

Objectives

After completing this module, you will be able to:

- Understand the MRI System Table Structure
- Understand the CM and RM Table Structure
- Understand the GL Table Structure
- Understanding the CM and RM Transactional Table Structure

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Lesson 1: Understanding the MRI System Table Structure

Purpose

The purpose of this lesson is to provide you with a general understanding of some of the underlying MRI system tables.

Objectives

After completing this lesson, you will be able to:

- Understand where MRI table and field structures are stored
- Find the primary key of a table
- Find the foreign key relationships of a table

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Composition of Tables in MRI

Overview

MRI uses the following tables to keep track of tables, fields, and relationships within the database. During table modifications in Table Design or during an upgrade, these tables are maintained as modifications are made to the table. Conversely, any changes made to MRI tables outside of MRI may result in limited functionality and/or loss of the fields during an upgrade.

Table	Description
MRITABLE	All tables in the database
MRIFIELD	All fields in all tables
MRIINDEX	Indexes, primary keys for each table
MRIRELN	Foreign key relationships between tables

MRITABLE

MRITABLE lists every table in the database, along with descriptions, which module each table belongs to, the date and user who created it, etc.

List all non-MRI (custom) tables:
*SELECT * FROM MRITABLE WHERE MRITABLE='N'*

Find tables containing "amenities" in the description:
*SELECT * FROM MRITABLE WHERE DESCRPN LIKE '%AMENITIES%'*

MRIFIELD

MRIFIELD lists every field in every table in the database, along with information about the field type, length, etc.

Find all the required fields in the BLDG table:
*SELECT * FROM MRIFIELD WHERE TABLENAME='BLDG' AND REQUIRED='Y'*

Show all fields in the 'JOURNAL' table with field lookups:
*SELECT * FROM MRIFIELD WHERE TABLENAME='JOURNAL' AND LOOKUP IS NOT NULL*

Show all fields in the database that store account numbers:
*SELECT * FROM MRIFIELD WHERE SYSFIELD='ACCTNUM'*

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Finding the Primary Key of a Table

Overview

A Database Index acts just like the index in the back of a book, instead of searching every page for the information we are looking for, we search the index and it points us to the right location.

MRIINDEX

MRIINDEX lists every index, including primary keys, on every table in the database.

Find the primary key fields for table RMLEASE:
*SELECT * FROM MRIINDEX WHERE TABLENAME='RMLEASE'*

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Understanding the Foreign Key Relationships of a Table

Overview

MRIRELN is used by MRI to determine join relationships, lookup lists, and a variety of other functionality. It's also very useful for determining entity relationships when you're writing queries or trying to find out about the database schema.

Example

The MRIRELN table lists every relationship (foreign key) between any two given tables in the database. All relationships in MRI are "many-to-one", meaning that for one record in the "primary" table, many records can exist in the "foreign" table. Consider the relationship between MRITABLE and MRIFIELD. In the MRIFIELD table, the TABLENAME field must reference a valid table in MRITABLE—but for any given record in MRITABLE, there can be (and almost always are) many records in MRIFIELD. In this relationship, MRITABLE is considered to be the "primary" table (the "one" side of the relationship), and MRIFIELD is considered to be the "foreign" table (the "many" side of the relationship).

What fields in the BLDG table reference other tables in the database?

*SELECT * FROM MRIRELN WHERE FOREIGNTBL='BLDG'*

What fields elsewhere in the database reference the BLDG table?

*SELECT * FROM MRIRELN WHERE PRIMARYTBL='BLDG'*

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Lesson 2: Understanding the CM and RM Table Structure

Purpose

The purpose of this lesson is to provide you with a general understanding of CM and RM Table Structure.

Objectives

After completing this lesson, you will be able to:

- Understand the basic CM table structure
- Identify relationships between the main CM tables
- Understand the basic RM Table Structure
- Identify relationships between the main RM tables

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Understanding the Basic CM Table Structure

Overview

The tables listed below are the most important in the Commercial Management module.

Table	Description
BLDG	Building table
CMPD	Current CM period for each building
SUIT	Suite table
MOCCP	Master Occupants
LEAS	Lease table
CMRECC	Recurring charges
INCH/SECINCH	Income categories
GLMT/SECGLMT	CM/GL master interface chart

BLDG

The BLDG table contains one record for each commercial building.

CMPD

The CMPD table stores the current CM period for each building.

SUIT

The SUIT table contains one record for each suite in every building.

MOCCP/LEAS

The LEAS table holds one record for each lease. A given LEAS record can be thought to represent the physical lease document for a particular suite. The MOCCP table represents the “master occupant,” which represents a tenant. A single MOCCP record might be associated with one LEAS record, or if the tenant is occupying multiple spaces, there can be many LEAS records associated with a single MOCCP.

When a first generation lease is created in MRI, both an MOCCP and LEAS record are created.

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CMRECC

All past, current, and future recurring charges for each lease are stored in the CMRECC table.

INCH/SECINCH

Income categories such as “rent” or “common area maintenance” are setup as codes in the INCH and SECINCH tables. INCH contains rental codes, SECINCH contains security deposit codes.

GLMT/SECGLMT

“Master Interface Chart”: The GLMT and SECGLMT tables determine how journal entries in GL will be created from transactions in CM.

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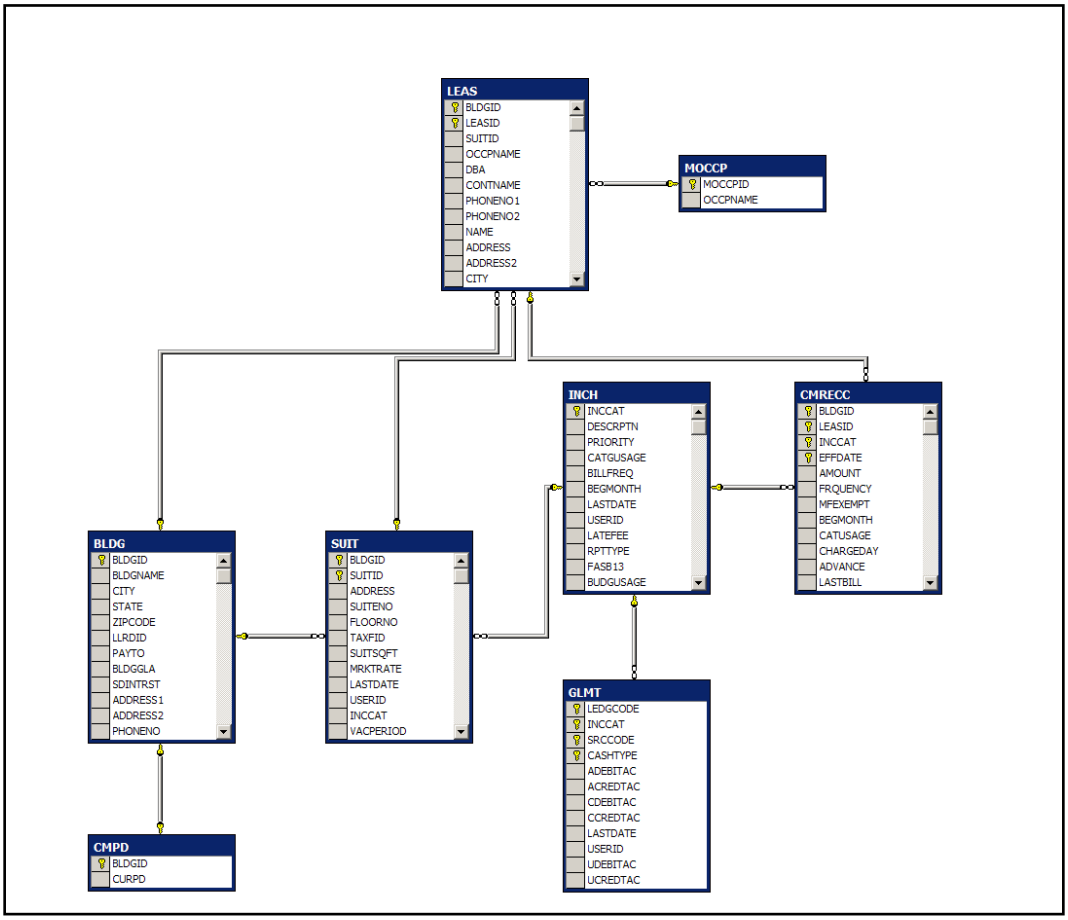
Identifying the Relationships between the Main CM Tables

Overview

The following diagram shows the relationships of the main CM tables.



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Understanding the Basic RM Table Structure

Overview

The following tables are the most important in the Residential Management module.

Table	Description
RMPROP	RM Property table
RMPD	RM Current period table
RMBLDG	RM Building table
CLSS	Unit class table
UNIT	Unit table
RMLEASE	RM lease table
RMRECC	Recurring charges
NAME	Residents, applicants, and prospects
PROSPECT	Prospect table
CHGCODE/SECCODE	Charge code table
RMGLMT/RMSECGLMT	RM Master interface chart
SCHD	Scheduler table

RMPROP

This table lists all properties in the database. A property typically represents an entire residential apartment complex.

RMPD

The RMPD stores the current RM period for each property.

RMBLDG

Each physical building in a residential property is recorded as a different record in the RMBLDG table. This table is used mostly for grouping and unit identification.

CLSS

Each type or class of unit within a property is listed as a record in the CLSS table. Default information for each unit in a class includes pricing, amenities, number of beds and baths, and square footage.

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UNIT

The UNIT table contains a record for each unit in a property.

RMLEASE

Each residential lease is stored as a separate record in RMLEASE. Each new resident results in a new RMLEASE record.

RMRECC

All past, current, and future recurring charges for each lease are stored in the RMRECC table.

NAME

All residents, co-residents, roommates, prospects, and applicants are stored in the NAME table.

PROSPECT

All prospective residents are stored in PROSPECT as well as in NAME. When a guest card or phone card is entered, a record is created in both NAME and PROSPECT.

CHGCODE / SECCODE

Charge code categories such as “rent” or “utilities” are setup as codes in the CHGCODE and SECCODE tables. CHGCODE contains rental codes, SECCODE contains security deposit codes.

RMGLMT / RMSECGLMT

“Master Interface Chart”: The RMGLMT and RMSECGLMT tables determine how journal entries in GL will be created from transactions in RM.

SCHD

The SCHD table contains all activities from the RM scheduler, such as move-ins, move-outs, and transfers.

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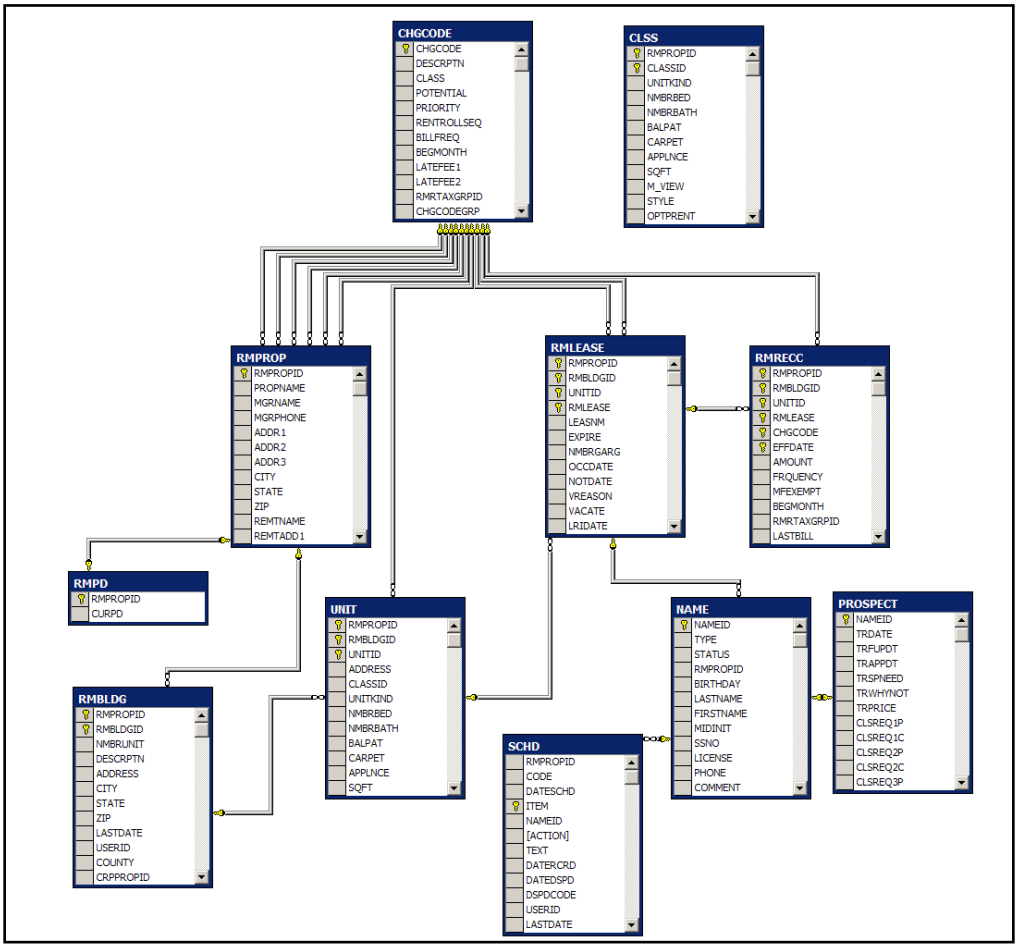
Identifying the Relationships between the Main RM Tables

Overview

The following diagram shows the relationships of the main RM tables.



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Lesson 3: Understanding the GL Table Structure

Purpose

The purpose of this lesson is to provide you with a general understanding of GL Table Structure.

Objectives

After completing this lesson, you will be able to:

- Understand the basic GL table structure
- Identify relationships between the main GL tables

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Understanding the Basic GL Table Structure

Overview

The following tables are the most important in the General Ledger module.

Table	Description
GLCD	Chart of accounts header table
GACC	Chart of accounts
JOURNAL	Current and future period detail transactions
GHIS	Historical detail transactions
GLSUM	Summary account balances
ENTITY	Financial property table
PERIOD	GL calendar
BMAP	Defines the relationship between entities, banks, and cash accounts in your chart.

GLCD / GACC

GLCD contains one record for each chart of accounts in MRI. The default chart is “MR”.

GACC contains one record for each account in the chart.

JOURNAL / GHIS

All detail transactions in GL are stored in JOURNAL or GHIS according to their period. Current and future transactions are stored in JOURNAL; historical transactions are stored in GHIS.

GLSUM

All activity entered into JOURNAL or GHIS is accumulated into balances in GLSUM by ACCTNUM, ENTITYID, PERIOD, BASIS, and DEPARTMENT.

All financial reports in MRI, aside from the general journal report, compute account balances and activity from GLSUM, not from the detail tables JOURNAL/GHIS.

ENTITY

An entity in MRI represents the financial aspect of a property. Typically an entity represents a single building or property, but you can set up an entity that has no properties associated with it (in the case of a cost center) or multiple properties (in the case of an office park or multi-use building).

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PERIOD

The PERIOD table keeps track of the current GL and AP period for each entity.

BMAP

The BMAP table defines the relationship between entities, banks, and cash accounts in your chart.

The BMAP table is involved in any cash transaction involving the entity, including checks cut from Accounts Payable and cash received in Commercial Management or Residential Management.

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Module 2: Getting Started in Web Design

Purpose

The purpose of this module is to provide you with an understanding of the Web Design user interface as well as the

Objectives

After completing this module, you will be able to:

- Navigate and explain the Web Design user interface
- Understand the different components of the MRI for Web interface
- Understand how Web Design interacts with your MRI database

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Lesson 1: User Interface

Purpose

The purpose of this module is to introduce you to the MRI Web Design user interface and the tools used to create view for MRI for Web

Objectives

After completing this lesson, you will be able to:

- Navigate within the Web Design interface
- Identify and use the Menu Items and Toolbar Icons used in Web Design

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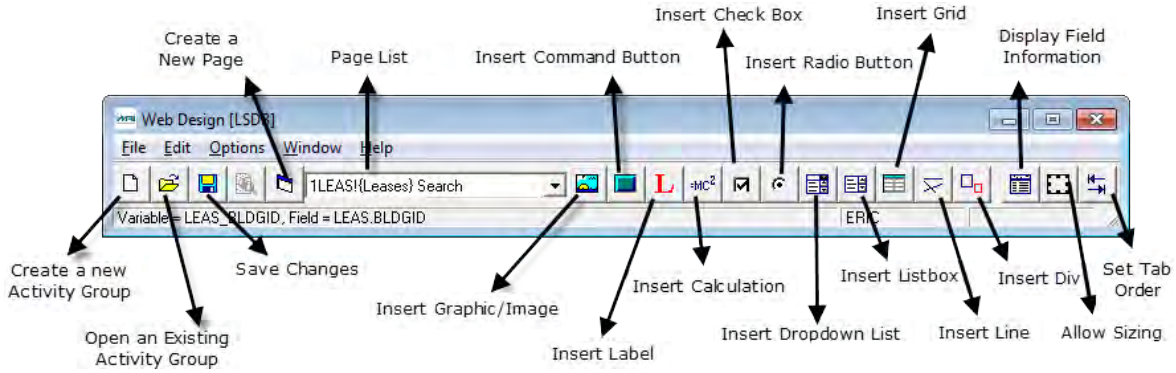
Understanding the Web Design User Interface

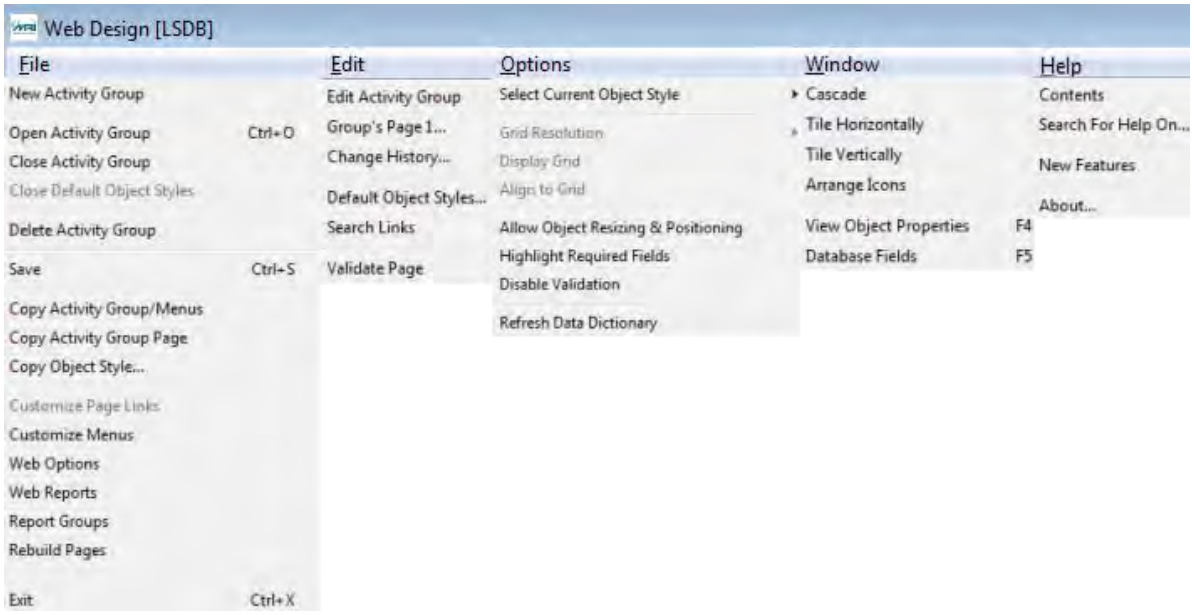
Overview

When you first enter Web Design, a unique tool bar offers several shortcut buttons and icons you can click to perform different functions.

Additionally, the menu bar allows you to manager your report definitions, report options, and somewhat control the look and feel of the interface.



Tool Bar



Menu Bar with Expanded Menus

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Lesson 2: Components of MRI for Web Interface

Purpose

The purpose of this module is to familiarize you with the components of MRI for Web.

Objectives

After completing this lesson, you will be able to:

- Identify and use the Menu Items and Toolbar Icons used in Web Design

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Understanding the MRI for the Web Interface

Overview

Before you can begin to use Web Design, you must understand the structures that comprise the MRI for the Web interface. This section describes

- Pages
- Activity Groups
- Menus

What is a Page?

The concept of a *Page* in Web Design is exactly the same as a web page that you would pull up with your browser at home. In MRI for the Web, pages enable you to create, modify, and view the records in a database table. Pages are composed of *object*s. An object is any item that appears on a page, such as a field, option button, grid, or label.

What is an Activity Group?

In Web Design, all pages are organized into related groups called *Activity Group*s (similar to a view in ViewDesign). An activity group typically contains a:

- **Selection** page, which enables a data entry user to select a record to view
- **Detail** page, which enables a data entry user to view more detailed information for the selected record

Activity groups may also contain additional related pages. For example, your database might contain a table that stores the business associates for each contact. You could create another page to separate the associate's information. In addition, each activity group can have its own menu, called an activity group menu (see menus below).

What are Activity Group and Master Menus?

MRI for the Web uses menus and links to navigate through the application. It uses the following four types of menus:

- **Activity Group Menus –** Appears at the top of some of the pages in MRI for the Web, providing a user access to related pages. They are also used as dropdown menus within applications to enable navigation through the module
- **Application Menu** – Is always available in the top left corner of the screen. It allows users to select which MRI application they would like to use

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- **Setup and Maintenance Menu** – Can be accessed by clicking **Setup and Maintenance** on the Setup Dropdown Menu in the top right of the MRI for Web Screen. Module Options can be set and changed from inside this menu.
- **Global Navigation Menu –** Controls the Setup and Help Dropdown Menus in the top right of the MRI for Web interface.

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Lesson 3: MRI Web structure

Purpose

The purpose of this module is to show you the basic structure of MRI website

Objectives

After completing this module, you will be able to understand MRI web three-tier structure

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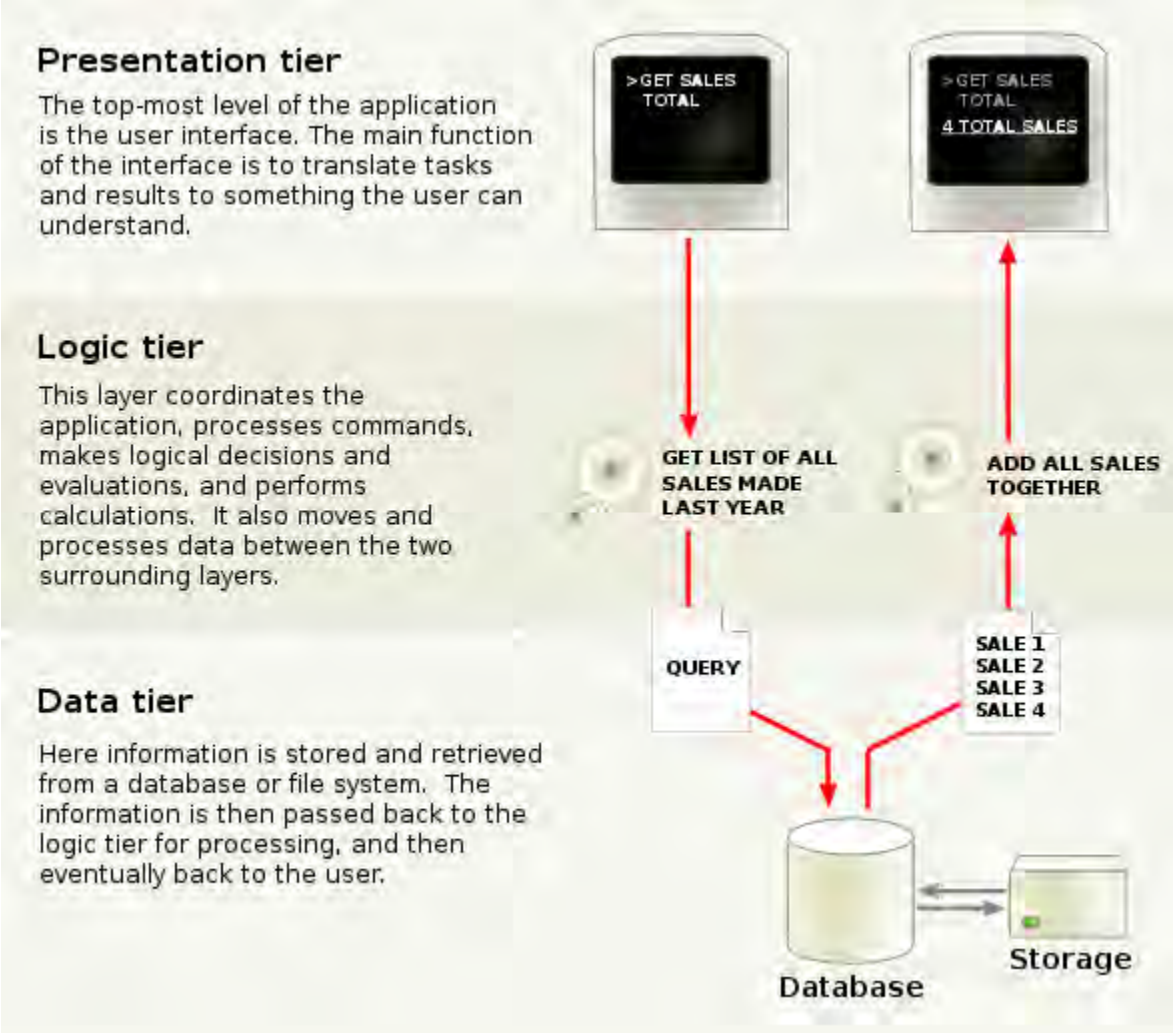
Three-Tier Architecture

There-tier architecture is a software engineering term, also refers to as client-server architecture, which means the presentation (user interface), the application processing (logic), and the data management (database) are logically separate processes. The advantage of the three-tier architecture is intended to allow any of the three tiers to be upgraded or replaced independently as requirements or technology change. For example, a change of the web user interface would only affect the web design.

MRI web uses three-tier architecture. This is the overview of MRI web three-tier structure:



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Lesson 4: MRI User Interface Components

Purpose

The purpose of this module is to show you the components of MRI web user interface

Objectives

After completing this module, you will be able to understand the components of MRI web user interface

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MRI Web User Interface Components

The comment components are:

Text box

A box in which to enter text or numbers.

Button

An equivalent to a push-button as found on mechanical or electronic instruments.

Drop-down list

A list of items from which to select. The list normally only displays items when a special button or indicator is clicked.

List box

A GUI widget that allows the user to select one or more items from a list contained within a static, multiple line text box.

Check box

A box which indicates an "on" or "off" state via a check mark ☑ or a cross ☒. Sometimes can appear in an intermediate state (shaded or with a dash) to indicate mixed status of multiple objects.

Radio button

A button, similar to a check-box, except that only one item in a group can be selected. Its name comes from the mechanical push-button group on a car radio receiver. Selecting a new item from the group's buttons also deselects the previously selected button.

Datagrid

A spreadsheet-like grid that allows numbers or text to be entered in rows and columns.

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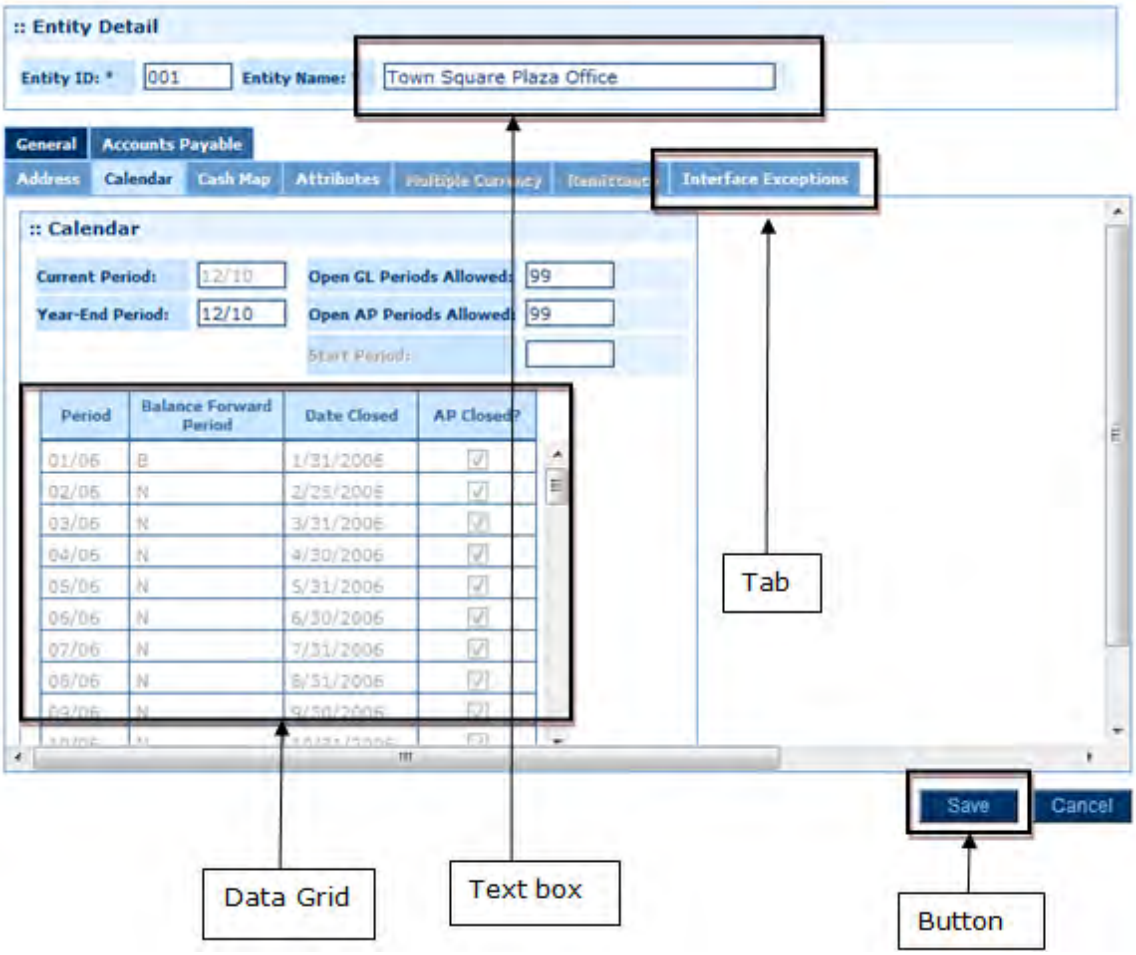
The user interface components under browser view:



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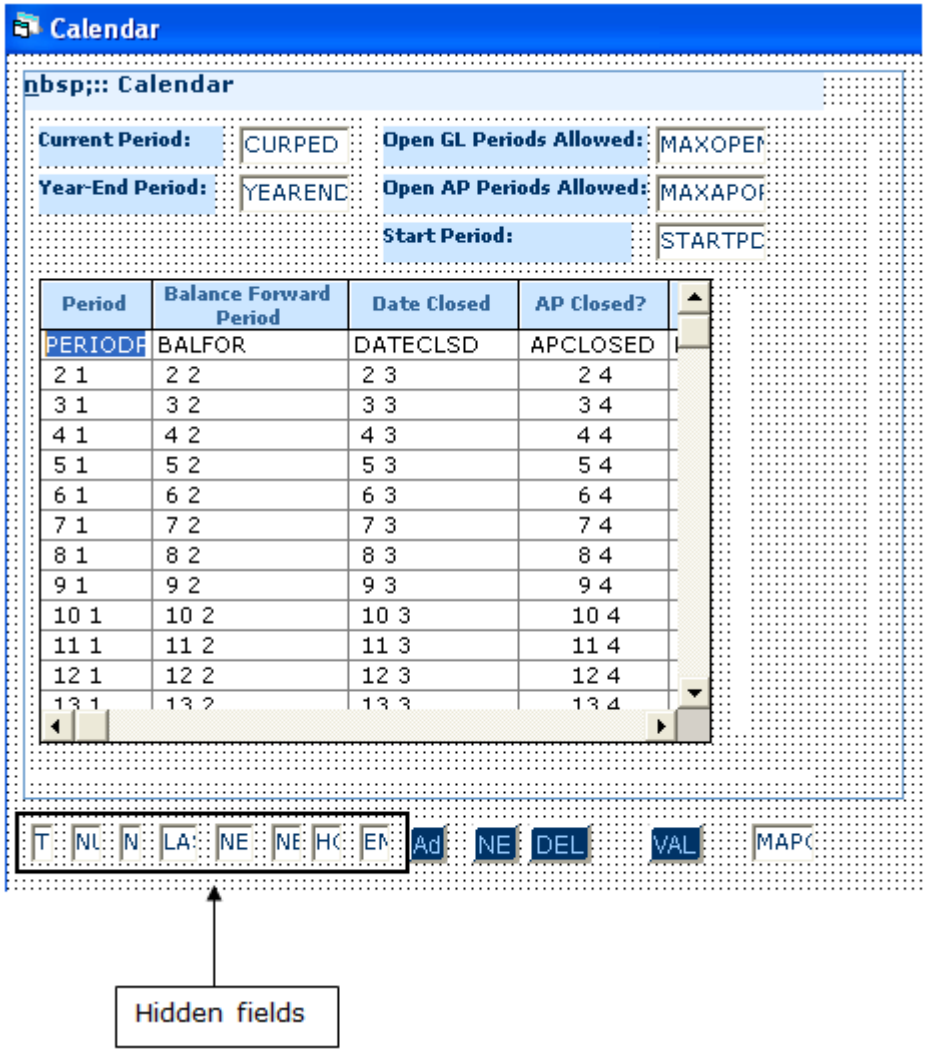
The user interface components under web design view:



The hidden fields are used to store session values of the interface page.

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Lesson 5: MRI User Interface and Database

Purpose

The purpose of this module is to show you the relationship between user interface and database

Objectives

After completing this module, you will be able to understand how the data displayed on MRI user interface related to MRI database

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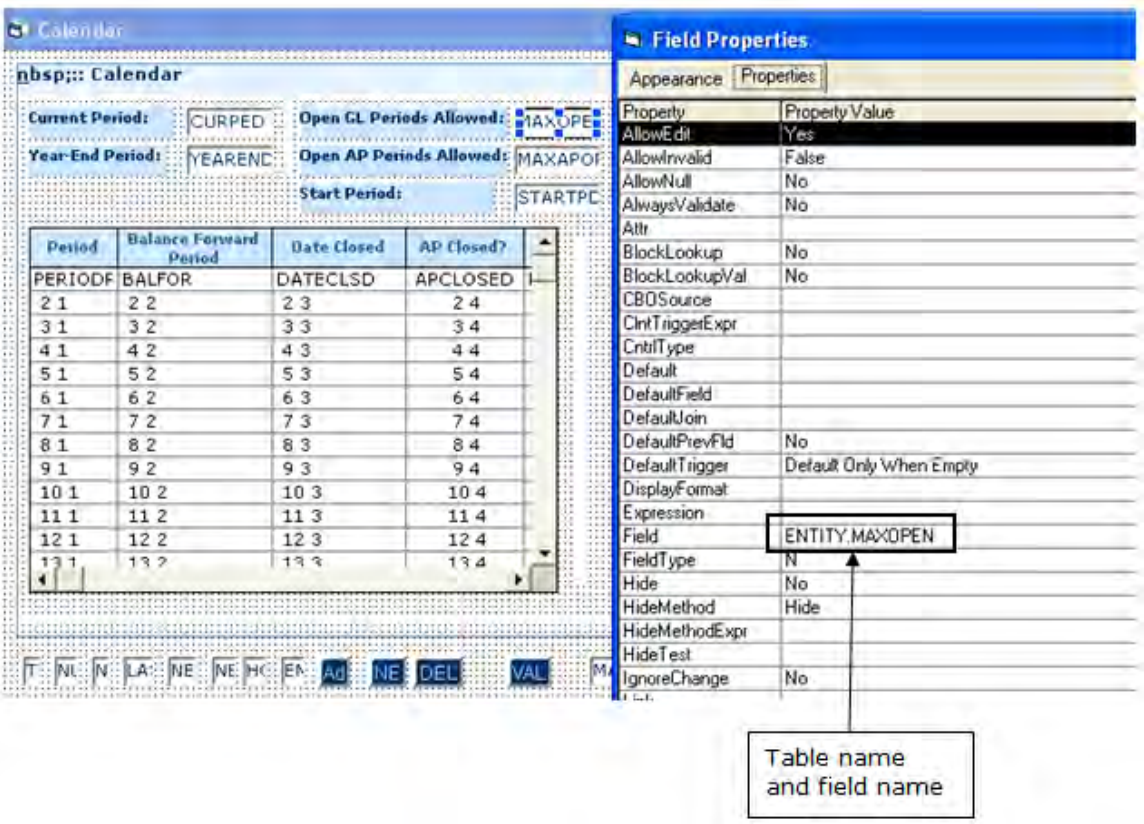
MRI User Interface and Database

Note:

- Data displayed in every field on the user interface was retrieved from database
- Data entered into every field is going to be saved to database.

In order to create a web page, all the information in the fields selected to the page must exist in database. Otherwise, system will not able to retrieve the date. If you want to edit the data, make sure you enter the correct data type, character or numeric.



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Module 3: Activity Groups and Pages

Purpose

The purpose of this module is to instruct you on how to create and copy Activity Groups and Pages. It will also show you how to setup your pages so they will display correctly within the MRI for Web Interface

Objectives

After completing this module, you will be able to:

- Create and Copy Activity Groups
- Create and Copy Pages
- Use Divs and Spacers to ensure that your pages display with the desired layout

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Lesson 1: Creating Activity Groups and Pages

Purpose

The purpose of this lesson is to instruct you how to create Activity Groups and Pages within Web Design

Objectives

After completing this lesson, you will be able to:

- Create an Activity Group
- Create a Page within an Activity Group

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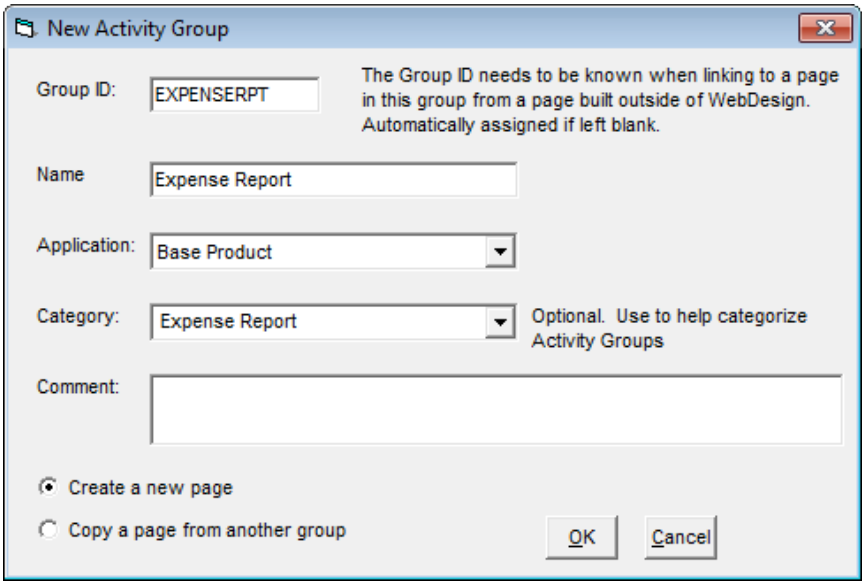
Creating an Activity Group

To create an Activity Group:

1. Click **New Activity Group** on the **File** menu or click the **New** button inside the Open Page/Group Dialog Box



The **New Activity Dialog Box** will open

2. Fill in the necessary information. The table below describes the content of each field

Field	Description
Group ID:	Type a unique name for the Activity Group.
Name	Name of the Activity Group
Application	(Required) Choose the MRI application that this Activity Group will be
Category	This field is optional. It helps to categorize the Activity Group
Comment	Include any notes you want about the Activity Group
Create or Copy	Select whether you would like to create your first page from scratch or copy it from another Activity Group

3. Once these fields have been entered, click **OK**.

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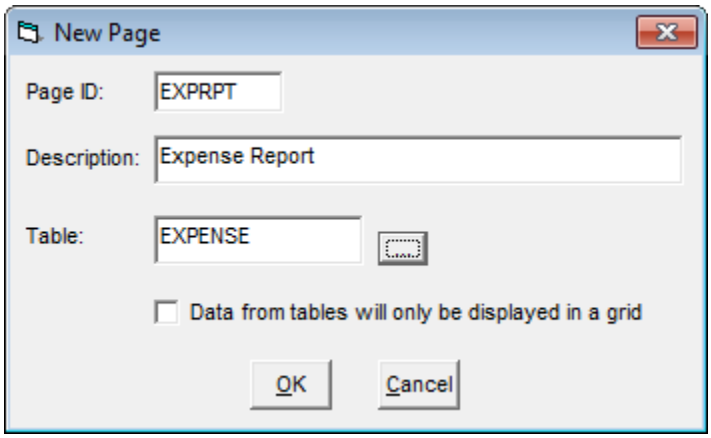
Creating a Page

To Create a Page:

1. Click the **New Page** icon in the toolbar



2. Fill in the necessary information. The table below describes the content of each field

Field	Description
Page ID:	Type a unique name for the Page. The name only needs to be unique within this Activity Group
Description	Type a Description of the Page
Table	Choose which table this Page will be referencing
Data from tables will only be displayed in a grid	Check if you are only planning to use a grid to display the information from the table

3. Once these fields have been entered, click **OK**.

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Lesson 2: Copying Activity Groups and Pages

Purpose

The purpose of this lesson is to instruct you how to copy Activity Groups and Pages within Web Design

Objectives

After completing this lesson, you will be able to:

- Copy an Activity Group
- Copy a Page within an Activity Group

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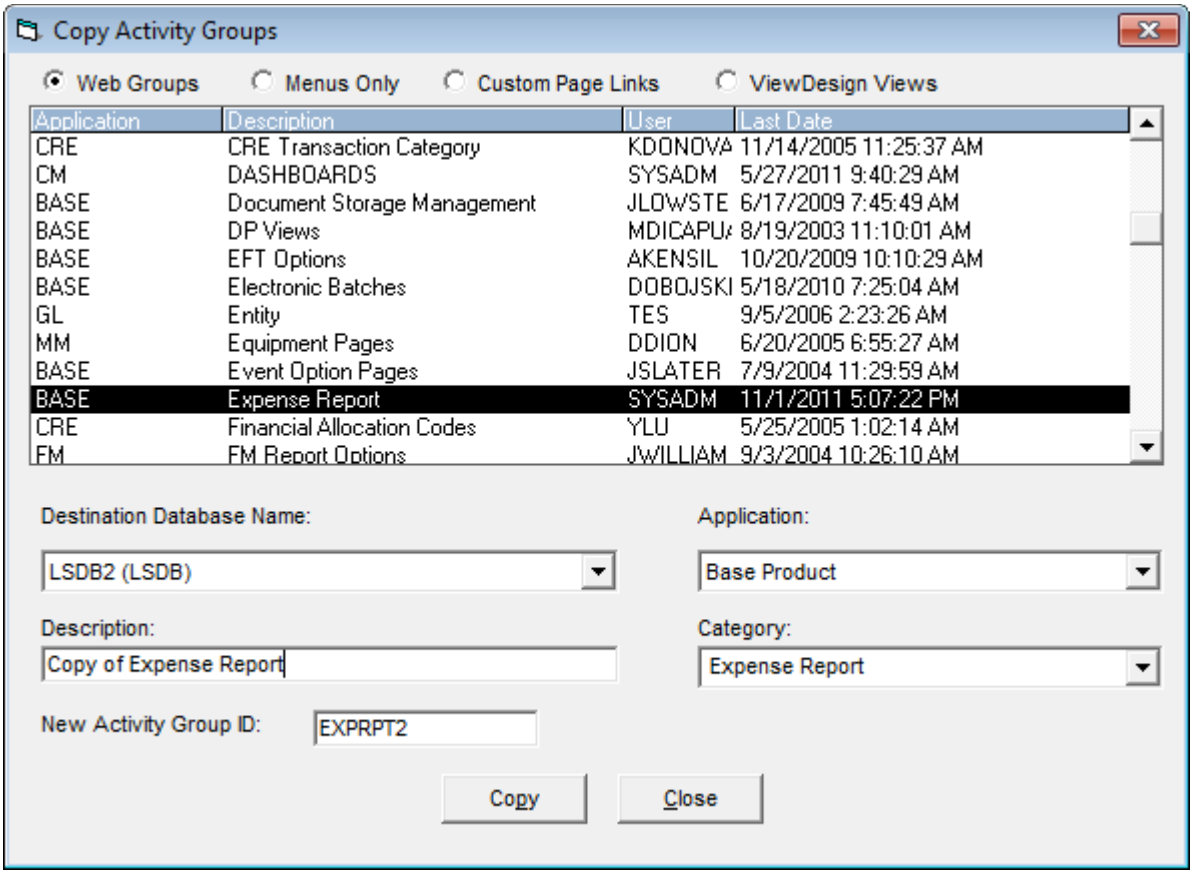
Copying an Activity Group

To create an Activity Group:

1. Click **Copy Activity Group / Menu** on the **File** menu



2. Select the Activity Group that you would like to copy
3. Select the database where the copy will be placed
4. The Application should default to be the same as the Activity Group being copied
5. Provide a Description, select a category and choose a New Activity Group ID.
6. Once these fields have been entered, click **OK**.

Note: You can also use this screen to copy Menus or ViewDesign Views.

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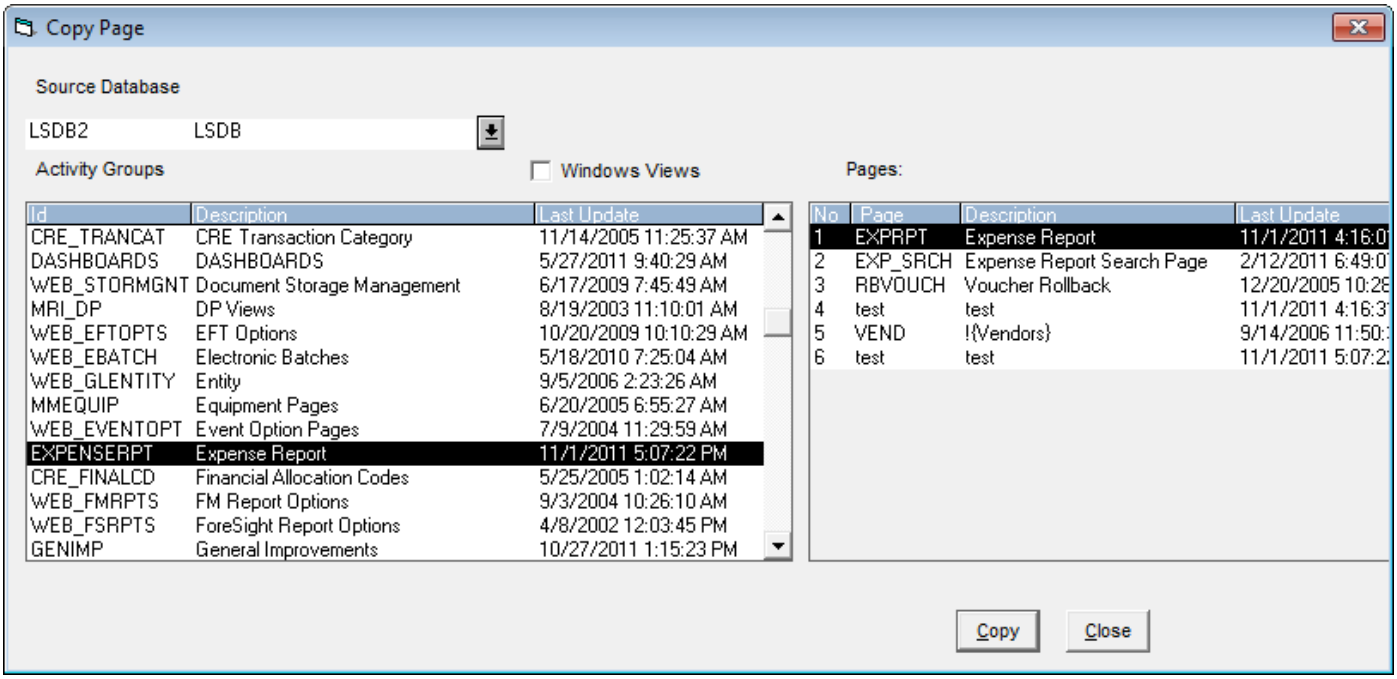
Copying a Page

To Copy a Page:

1. Open up the Activity Group that you want the copied page to be located in.
2. Click **Copy Activity Group Page** on the **File** menu



3. Choose the Page you would like copied
4. Click **OK**.
5. The copy of the page will now be the last page in the open activity group

Note: You can also use this screen to copy MRI Windows views when "Web Enabling" a custom feature or report

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Lesson 3: Divs and Spacers

Purpose

The purpose of this lesson is to show users the necessity of Divs and Spacers and to instruct them on how to use them.

Objectives

After completing this lesson, you will be able to:

- Add Divs and Spaces to a Page in Web Design
- Create a page that will

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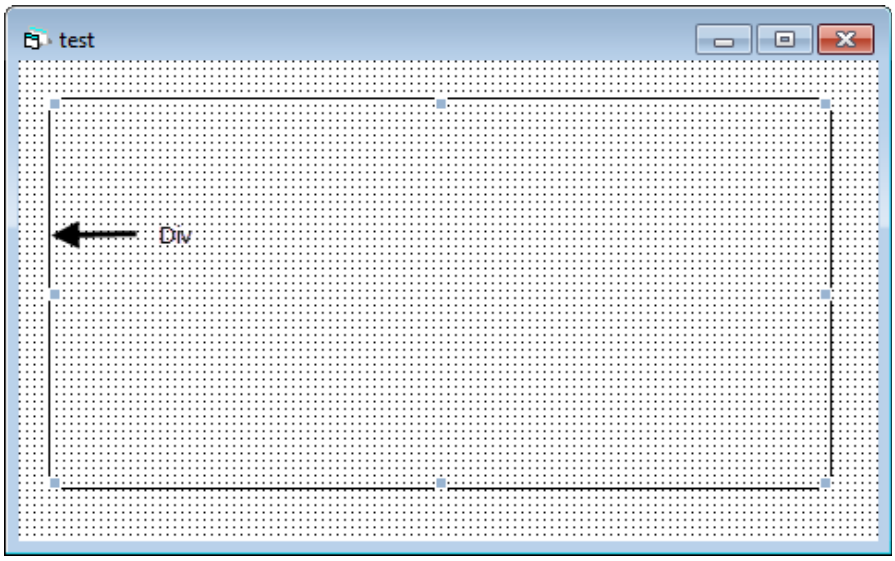
Divs

Divs represent HTML division tags (<DIV>...</DIV>) that mark the sections of a page. To format your page correctly for MRI for the Web, at least one div object must surround all of the data objects on the page. You can add additional divs to group similar items of information.

To add a div to a page:

1. Click **Add Div** from the toolbar
2. Click and then drag diagonally across the area of the page where you want to add the div



Note: To format your page correctly for MRI for the Web, a div object must surround all of the data objects on the page.

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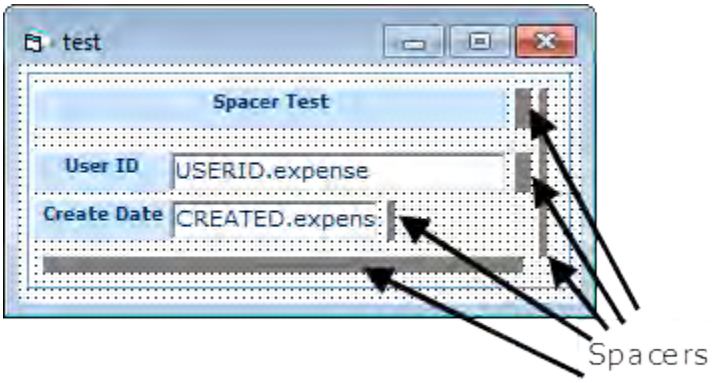
Spacers

Spacers are blank labels that are used to create white space on the page. Objects in Web Design expand down and to the right until they run into another object. Spacers in MRI Web Design are also used to force objects to display correctly.



Note: The spacers in the image above are colored grey for better visibility. Typically spacers are the same color as the background of the page.

To add spacers to a page:

1. Click **Add Label** from the toolbar
2. Click and then drag diagonally across the area of the page where you want to add the label
3. Open the *Label Properties* dialog box. To open the properties dialog box, hover your mouse above the object, right click, and then select **Display Properties**.
4. Click the **Appearance** tab, and then for each *Property* field listed below, enter the value for each one.

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Module 4: Objects in Web Design

Purpose

The purpose of this module is to introduce you to the different types of objects in MRI Web Design.

Objectives

After completing this module, you will be able to:

- Find and change object properties
- Know how to add objects to pages in MRI Web design
- Know how to set the tab order on a page

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Lesson 1: Object Properties

Purpose

The purpose of this lesson is to introduce you to Object Properties

Objectives

After completing this lesson, you will be able to:

- Find and change the properties of objects in MRI Web Design
- Understand how Object Properties affect MRI for Web

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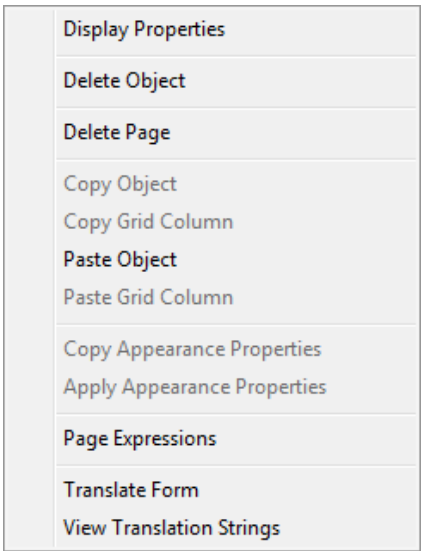
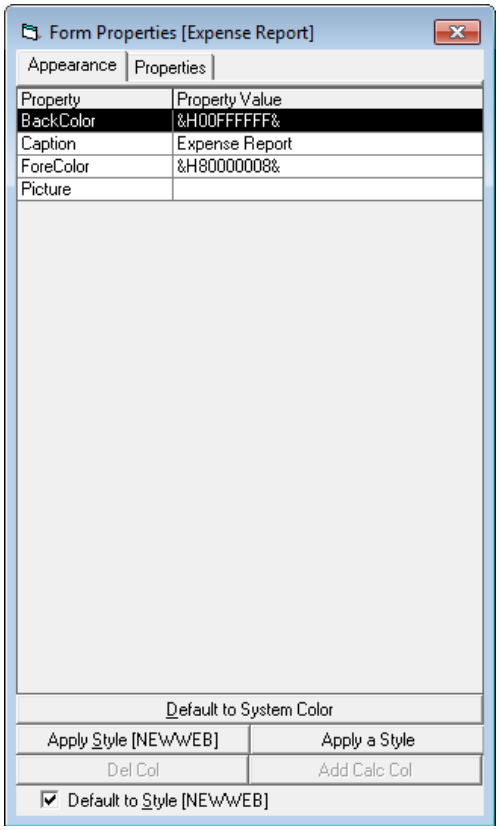
Finding Object Properties in MRI for Web

Every object in Web Design has properties. These can be found by right clicking the object and selecting **Display Properties**



The **Object Properties** dialog box will then open



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Each object in Web Design has a different set of properties but they will all have the *Appearance* and *Properties* tabs. Some objects will also have more tabs included in their properties. Some properties can be changed within the Object Properties dialog box while clicking on others will open up a window with more space and options.

The *Appearance* tab will have properties associated with how the object will look when displayed on MRI for Web. Some of the most utilized properties are:

- Caption: Allows you to set what text will be displayed on the object
- Alignment: Set whether the text is aligned to the Center, Left, or Right
- BackColor: Choose the background color of the object

The *Properties* tab contains settings that control how the object behaves in MRI for Web. *Properties* has more options it also has more unique options when different objects are selected. Some of the most utilized options within *Properties* are:

- Query: Define a query that will run when on the field when the page is loaded. Typically used to populate a form or grid column
- Hide: Turn on if you do not want to display the object on the page
- Link: Set what page opens when a button is clicked

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Lesson 2: Adding Objects to Pages

Purpose

The purpose of this lesson is to show you how to add various objects to pages in Web Design

Objectives

After completing this lesson, you will be able to:

- Add buttons to pages
- Add table fields to pages
- Add calculation fields to pages
- Add pictures to pages
- Add checkboxes to pages
- Add radio buttons to pages
- Add list boxes to pages
- Add lines to pages

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Adding Buttons to a Page

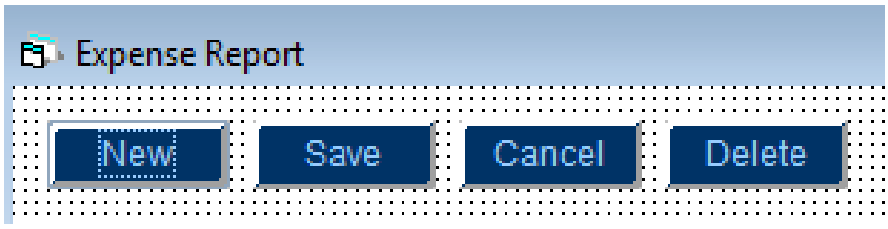
Command buttons enable data entry users to initiate special actions or functions. Some of the ways you can use command buttons include:–

- Opening pages
- Executing commands
- Running reports

Note: Buttons are used in MRI for the Web to create new records, save records, cancel changes, and delete records. There is not a standard toolbar, like windows, that provides this functionality. These commands need to be created for each page.

To add a Command Button to a page:

1. Click **Add Command Button** from the toolbar
2. Click and then drag diagonally across the area of the page where you want to add the command button.



3. Open the Command Button Properties
4. Within the *Appearance* tab you can set the text that will display on the button and its background color
5. On the *Properties* tab you can define what event will occur when the button is clicked. A few of the most used commands are listed in the table below

Property	Value	Function
CMD	CLNTCMD{NEW}	Clicking the button will create a new record in the table
CMD	CLNTCMD{SAVE}	Clicking the button will save the table
CMD	CLNTCMD{DELETE}	Clicking the button will delete the current record in the table
CMD	CLNTCMD{CANCEL}	Clicking the button will cancel any changes since the table was last saved

Another property that can be set is Link. Link allows you to set a page to open when the button is linked. Linking to pages will be discussed later in this training guide.

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Adding Table Fields to a Page

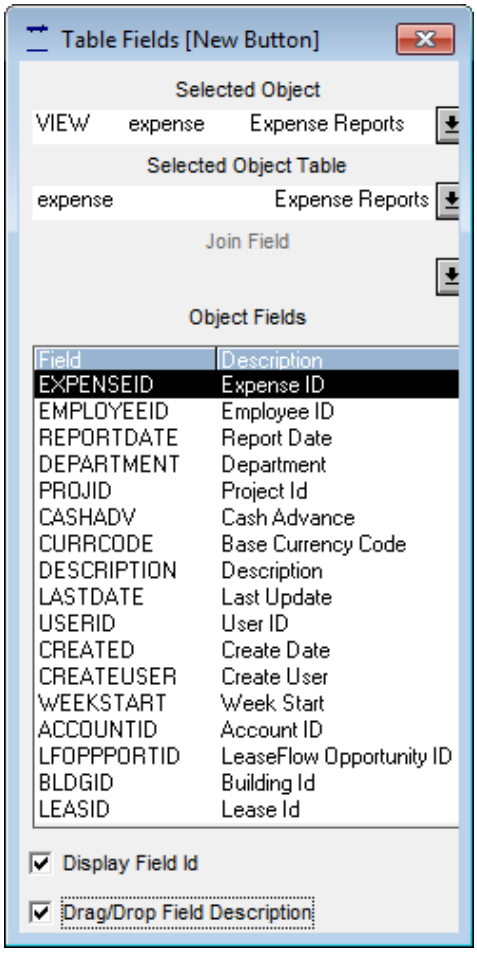
The **Table Fields** dialog box enables you to add field objects to your page. From the **Table Fields** dialog box, you can access a list of fields from the—

- Table on which the page is based
- Primary tables to the table on which the page is based
- Table on which an object is based, such as a grid
- Primary tables to the table on which an object is based

By default, field objects appear as text fields. In general, you only need to change how a field object appears if the associated table field contains a static value set. If the associated table field contains a dynamic value set, MRI automatically provides the lookup list function to the field object.

To add a table field to a page:

1. Open the **Table Fields** dialog box by clicking on the **Display Field Information**



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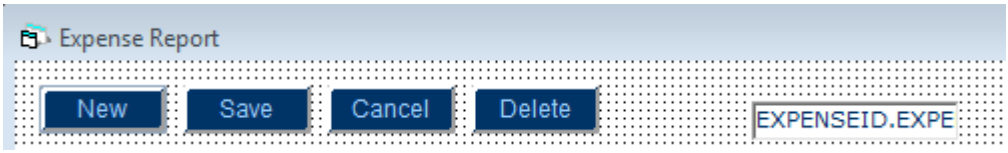
2. Drag and drop the field onto your page



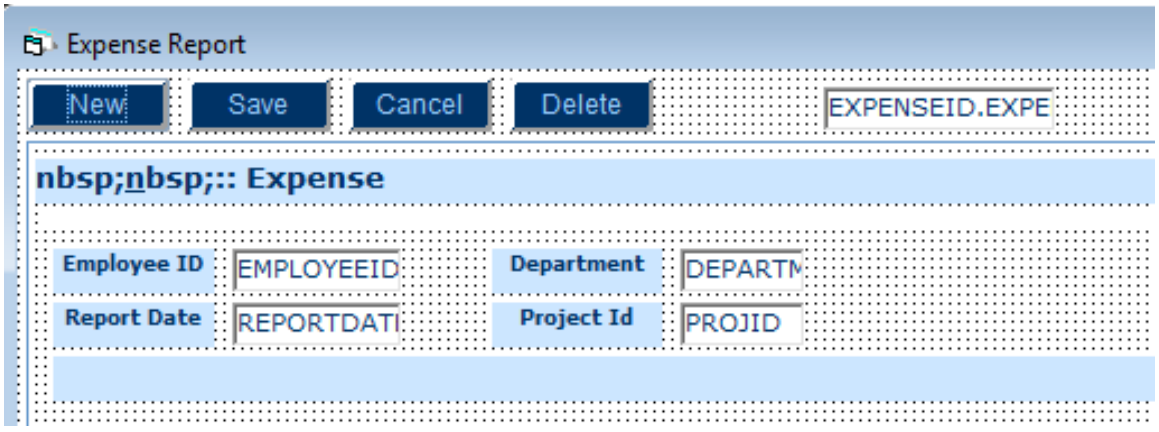
Note: If you want the field to have the field description placed in a label next to it, make sure that the **Drag/Drop Field Description** checkbox is checked.

Adding Other Objects to Pages

Other objects can be added to your page from the **Web Design Toolbar**. They include:

- Graphics
- Labels
- Calculation Fields
- Checkboxes
- Radio Buttons
- Dropdown List
- List Box
- Lines

To add these objects to your page just click the appropriate button on the **Web Design Toolbar** and draw the object on you page. The edit the object properties within each object's Property's page.



Note: Adding nbsp;nbsp;:: inside a label will place spaces followed by two colons infront of the text.

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Lesson 3: Setting Tab Order on a Page

Purpose

The purpose of this lesson is to show you how to set the Tab Order on a Page in MRI Web Design

Objectives

After completing this lesson, you will be able to set the Tab Order of a Page

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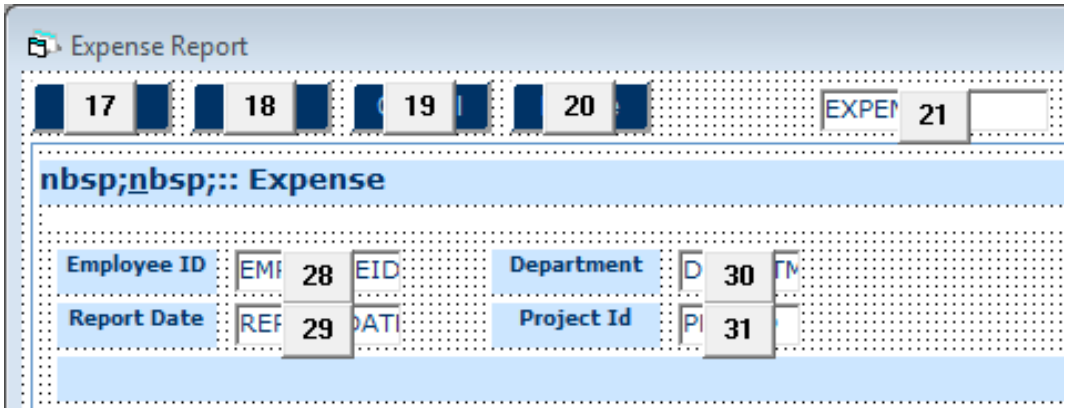
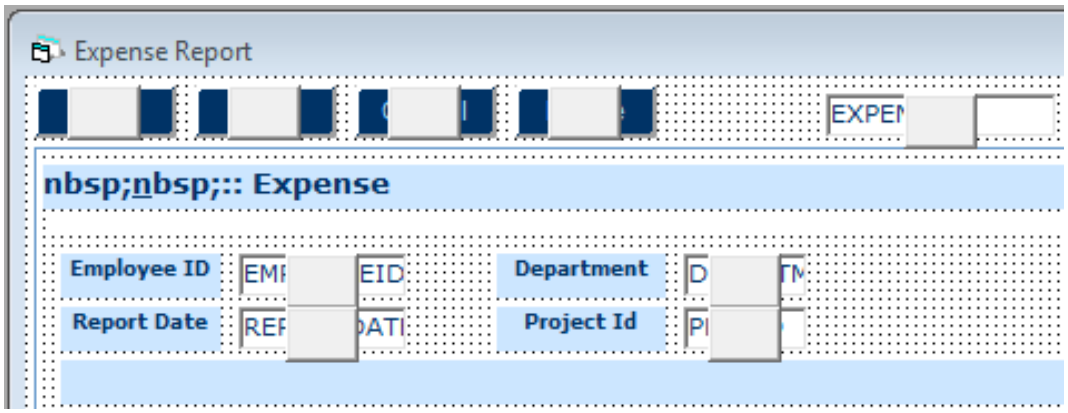
Setting Tab Order on a Page

To Set the Tab Order on a Page:

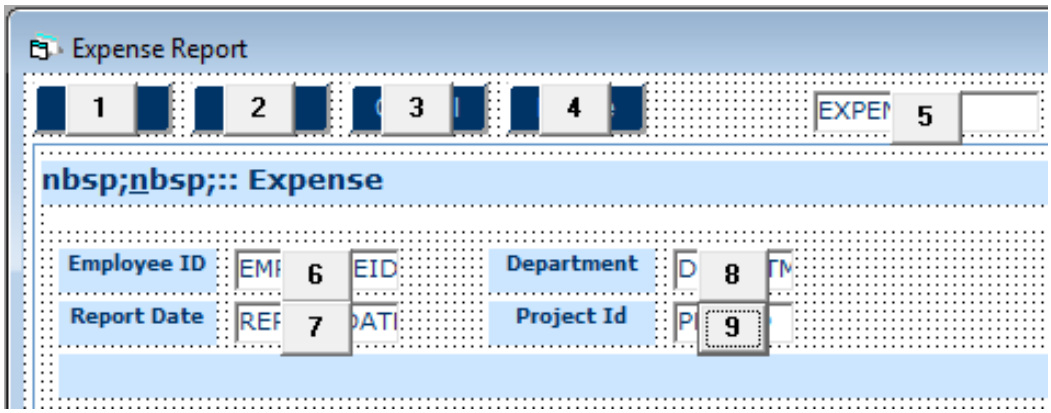
1. Click the **Set Tab Order** button from the **Web Design Toolbar**. The **Tab Control** dialog box will appear next to your page. You can now see the current tab order of your page



2. To set a new tab order, click the **Clear All** button to clear the numbers from all of the tab order boxes on your page



3. Then click on each box in the order that you would like to set on your page



4. Congrats! You have now set your Tab Order

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Module 5: Grid Objects in Web Design

Purpose

The purpose of this module is to introduce you to Grid objects in MRI Web Design. It will show you how to add a grid and how to add columns to that grid

Objectives

After completing this module, you will be able to:

- Add a grid
- Add/Edit Field and Calculation Columns within a grid
- Use Command Buttons to add and delete grid rows
- Add a Dropdown List to a grid
- Add a Calculation Field to sum a grid column

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Lesson 1: Creating a Grid

Purpose

The purpose of this lesson is to show you how to create a grid. This includes setting the base table for the grid and adding Field and Calculation Columns

Objectives

After completing this lesson, you will be able to:

- Create a grid
- Add a Field Column to a grid
- Add a Calculation Column to a grid

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Grids

Grids display multiple records on a single page and are composed of the following two elements:

- **Rows** - Represent each record. For example, a grid based on the Expense Detail (EXPENSEDET) would contain a row for each expense detail record.
- **Columns** - Represent each field in the table. For example, a grid based on EXPENSEDET table would contain a column for each field, such as *Expense I*D, *Expense Date*, and *Expense Amount*.

You can use grids for a variety of purposes, such as displaying:

- All of the records in a table (selection or lookup page)
- Records from one table that relate to records in another table (master/detail page)
- Calculated values (ViewPoint has examples)

Adding a Grid Object

The process of adding a grid to a page involves two steps: creating the *grid are*a, which defines the table on which you want to base the grid, and adding the columns. You can add—

- **Table field columns**, which represent fields in the table on which your grid is based, or a table related to the table on which your grid is based
- **Calculated columns**, which do not store data in fields in a table

To add a grid object:

1. Click **Add Grid** from the **Web Design Toolbar**

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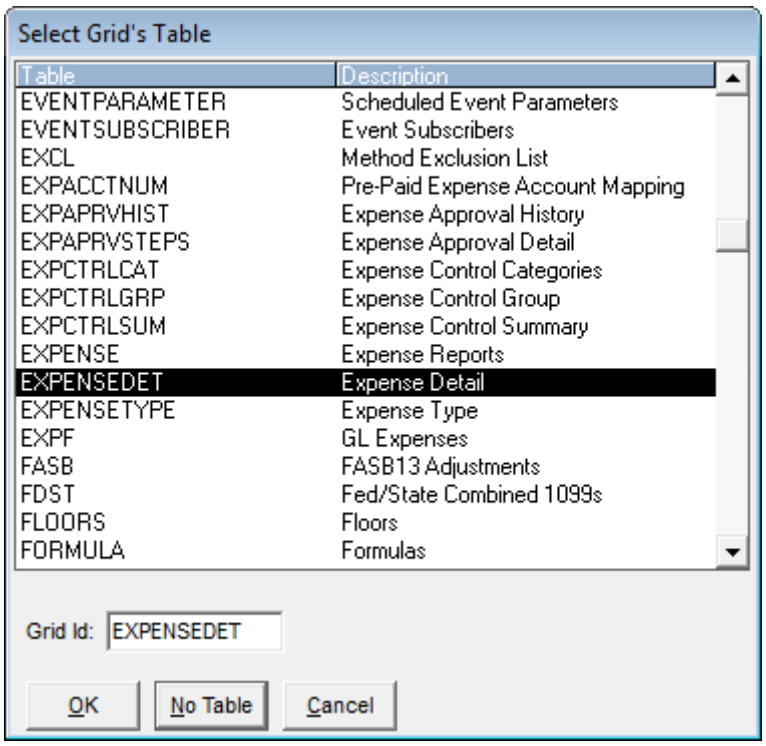
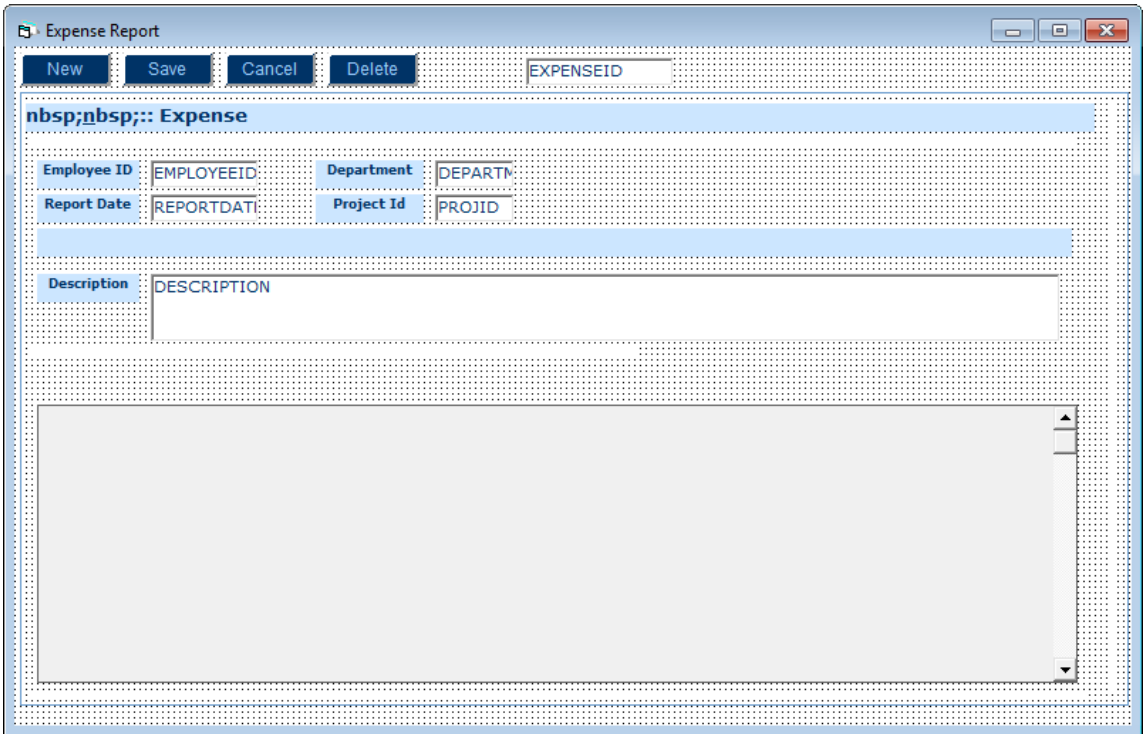
2. Click and then drag diagonally across the area of the page where you want to add the grid. The **Select Grid's Table** dialog box will then display



3. Choose the table that you would like to associate with your grid.

4. Click **Ok**.



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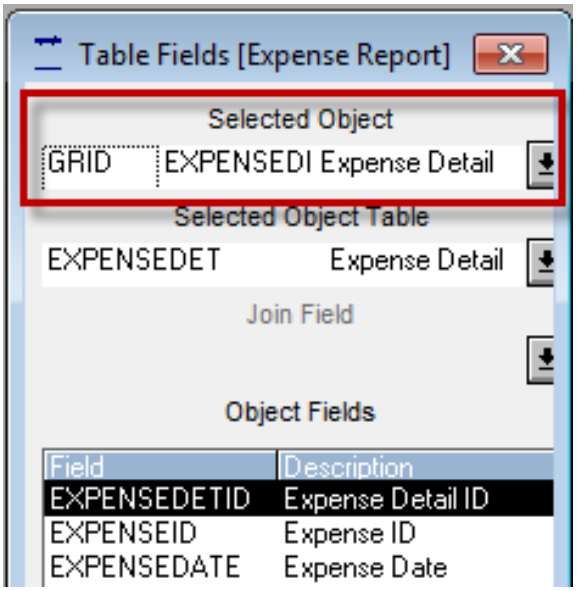
Adding a Table Field Object to a Grid

To add table field columns:

1. Open the **Table Fields** dialog box, and then in the **Selected Object** field, select **GRID [Table Name]** to display the fields for the table on which you based the grid



2. In the **Object Fields** list box, select the field you want to add as a column in the grid, and then drag the field to a space within the grid.

Note: If the sizing handles tool is enabled, deactivate it from the toolbar

Expense Date	Expense Type	Description	Project Id	Base Currency	Expense Amount	Expense Detail ID	Expense ID

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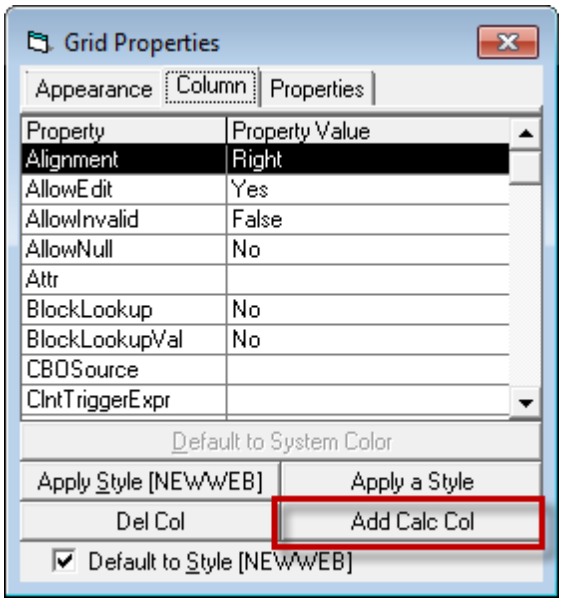
Adding a Calculation Column to a Grid

Calculation columns are used to calculate expressions in a grid object. You can embed any MRI standard expression within a column to do easy or complicated logic. Calculation columns are also used to select records in the grid for deletion

To add a calculation column for record selection:

1. Open the **Grid Properties** dialog box, and then click the **Column** tab to enable the Add Cal Col button. Click **Add Calc Col** to add the column.



2. The Calculation Column is now the last column in your grid. You can position it by dragging it into place

Expense ID	Employee ID	Description	
EXPENSEID.EXPE	EMPLOYEEID.EXPENSE	DESCRIPTION	
2 1	2 2	2 3	2 4
3 1	3 2	3 3	3 4
4 1	4 2	4 3	4 4
5 1	5 2	5 3	5 4
6 1	6 2	6 3	6 4
7 1	7 2	7 3	7 4
8 1	8 2	8 3	8 4
9 1	9 2	9 3	9 4
10 1	10 2	10 3	10 4
11 1	11 2	11 3	11 4
12 1	12 2	12 3	12 4
13 1	13 2	13 3	13 4

3. Use the Calculation Column's properties to perform operations on the grid.

In the next lesson you will learn how to use buttons to perform Insert and Delete functions on a grid

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Lesson 2: Adding Command Buttons to Insert and Delete Grid Rows

Purpose

The purpose of this lesson is to show you how to use Command Buttons to Insert and Delete grid rows

Objectives

After completing this lesson, you will be able to:

- Program a Command Button to Insert or Delete a grid row
- Create a calculation column to indicate which row will be deleted

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Add Command Buttons to Insert and Delete Grid Rows

To add commands to insert and delete grid rows:

1. Add two new command buttons above the grid. The first command button will be named New, and the second one will be named delete.

2. Use the table below to edit the command button properties

Object Name	Property	Property Description	Property Value	Expression Description
New	Text	Type the text you want to appear on the button	**New**	N/A
New	CMD	Defines an expression the system executes to the client when the user clicks the object	**CLNTCMD{INSERTROW, GRIDID}**	Adds a blank row to the grid.
New	Title	Defines the text that appears when a user moves the mouse over the object.	**Click here to add a new row**	N/A
Delete	Text	Type the text you want to appear on the button.	**Delete**	
Delete	CMD	Defines an expression the system executes to the client when the user clicks the object	**CLNTCMD{DELETEROW, GRIDID}**	Deletes record(s) from the table.
Delete	Title	Defines the text that appears when a user moves the mouse over the object.	**Click here to delete a the selected rows**	N/A

3. Add a calculation column to the grid. Set the following properties below
    a. CntrlType: Checkbox
        i. Defines the type of object that appears on the page in data entry mode.
    b. VariableName: GRIDID_CHK
        i. To define the column as the delete selection column, the VariableName must be in the form of GRIDID_CHK

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Lesson 3: Adding a Dropdown List to a Grid Column

Purpose

The purpose of this lesson is to show you how to add a dropdown list to a grid column

Objectives

After completing this lesson, you will be able to:

- Add a dropdown list to a grid column
- Add a blank line into the dropdown list

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Add a Dropdown List to a Grid Column

Dropdown lists are great for selecting from a small number of records.

Dropdown list do not require a trip back to the server to get the data unlike lookup lists. Use dropdown lists when there are a small number of records in the table. For example, do NOT use dropdown lists to select records from the LEAS or NAME table. These tables can potential have thousands of records

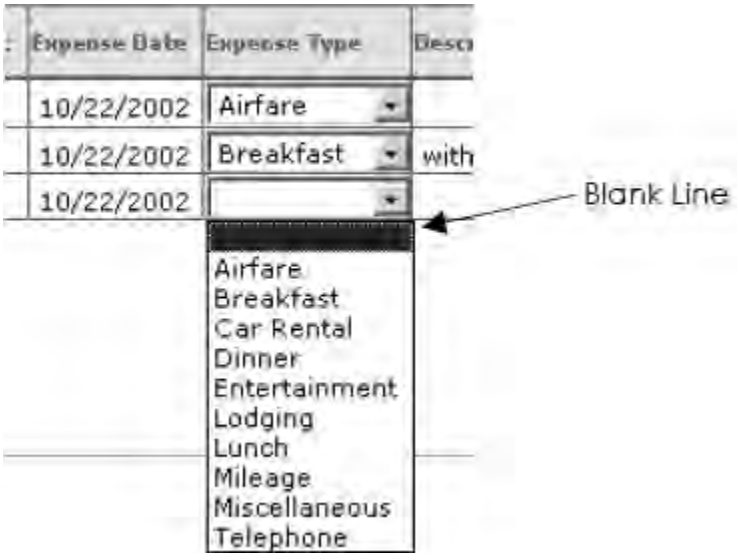
To add a dropdown list to a grid column:

1. Select the desired column and open the column properties. Set the following properties below
    a. CntrlType: Combo Box
    b. CBOSource: SELECT (variable you want in the list) FROM (TABLE) ORDER BY (variable you want ordered by)
        i. You can define a general list of the CBOSource instead of using a SQL statement by using the following syntax:

            LIST: code1,codedesc1,code2,codedesc...

Hint: You can add a blank line into your SQL Statement by doing a NULL UNION statement

UNION SELECT NULL, NULL FROM (TABLE) GROUP BY (list variable) ORDER BY (order variable)



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Lesson 4: Setting Default Values in a Grid

Purpose

The purpose of this lesson is to show you how to set the default values of a grid. It will also show you how to have that default be an automatic sequence

Objectives

After completing this lesson, you will be able to:

- Set the default value of a grid column
- Set the default value to be part of an autonumber sequence

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Setting the Default Value for a Grid

Setting the default value of a grid column saves time for the person entering data and it also allows hidden columns to be populated with data. A great example of hidden columns needing to be populated would be the LEASID and BUILDID fields on a LEAS subtable.

Another reason to set a default value on a grid column is if you would like that column to be autonumbered.

Follow the steps to set a default value for a grid column:

1. Select the desired column and open the column properties. The following properties below are options that you have to set as defaults
    a. Default: [VARIABLE] (This is where you would use BLDGID, LEASID, PROPID, or other variables that are IDs and are typically part of Primary Keys)
    b. DefaultPrevFld: Yes/No (Defaults the field to be the same as the one above it. Is useful when entering repetitive data)

Follow the steps to set an autonumber default value for a grid column:

2. Click the **Properties** tab on the grid object
3. In the AutoNumFld and SequenceID properties, enter in the variable name for the column that you have autonumbered. Make sure that both are set to the same value

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Lesson 5: Adding a Calculation Field to Sum a Grid Column

Purpose

The purpose of this lesson is to show you how to create a calculation column that will sum a grid column

Objectives

After completing this lesson, you will be able to:

- Create a calculation column on a page that will sum a grid column

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Add a Calculation Field to Sum a Grid Column

Follow the steps to create a calculation field to sum a grid column:

1. Click on the **Add Calculation Field** button on the **Web Design Toolbar** and then drag the field into position on your page
2. Open the properties of your new calculation field. Set the following properties listed in the table below.

Object Name	Property	Description	Value
Total	VariableName	Name of your calculation field	TOTAL
Total	Expression	Defines an expression the system executes to the server whenever the page loads, such as when a record is saved.	GRIDSUM(GRIDID, VARIABLENAME}
Total	AllowEdit	Sets whether or not a user can enter or modify a value in the field.	No
Total	FieldType	Sets the type of data the field will display	Numeric
Total	Alignment	Aligns the text in the object	Right

3. Now whenever you save the records in your grid this field will be updated with the total amount.

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Module 6: Creating a Selection / Lookup Pages

Purpose

This section describes how to create selection pages and search fields. The selection pages are necessary for users to lookup specific records in the database. Selection pages replace the standard F7/F2 functionality in windows. There is generally at least one selection page in an activity group.

Objectives

After completing this module, you will be able to:

- Create selection and lookup pages in MRI Web Design

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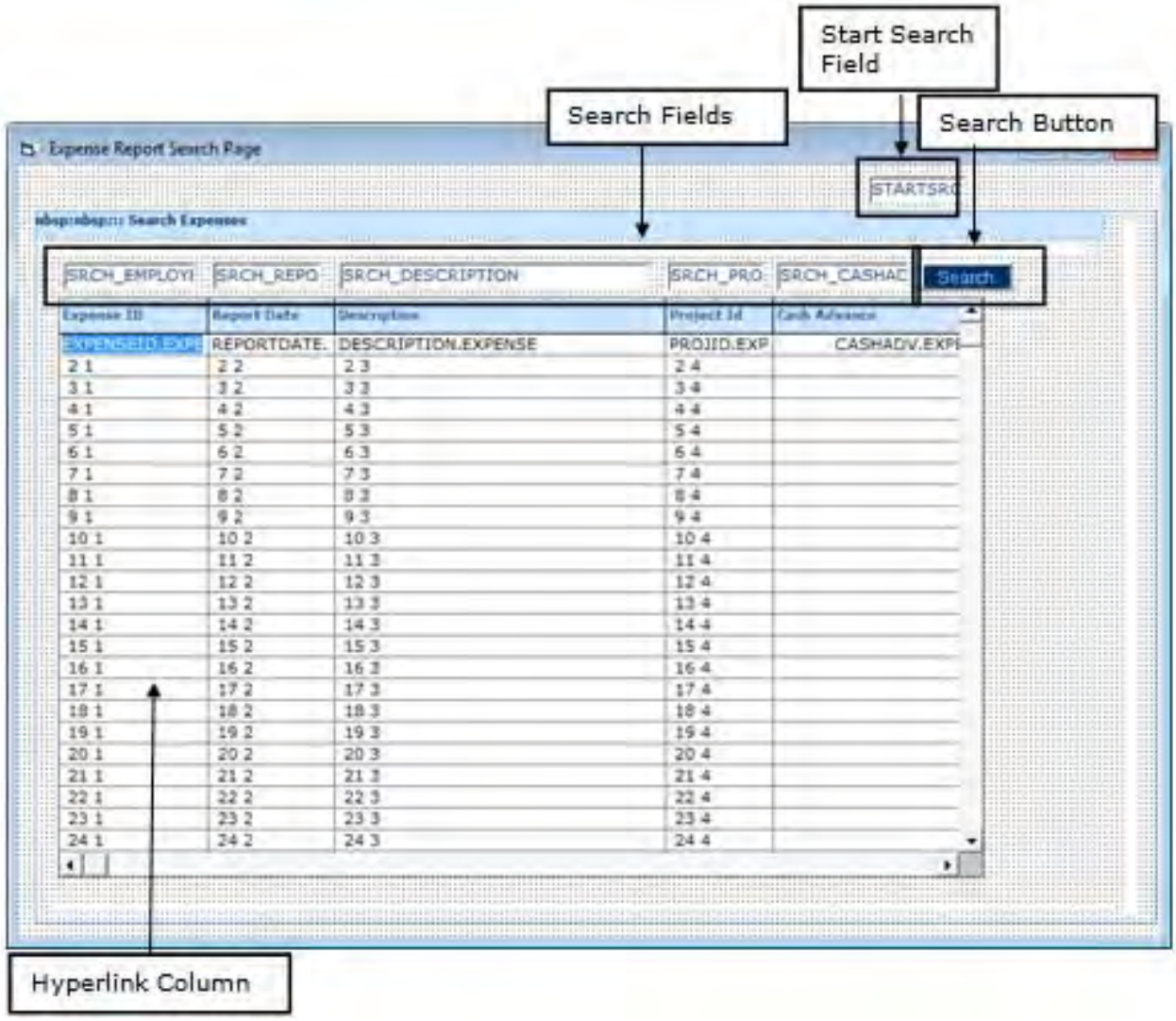
Lesson 1: Creating a Selection / Lookup Page

Overview

There are many components of a selection page that you will need to understand
(see below).



Non hidden fields:

Search Fields – Appear above the grid on selection pages in MRI for the Web, enabling a user to look up specific records by the data in a column.

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Search Button – Appears to the right of the search fields. This button executes the search on the server and returns the results into the grid.

Hyperlink Column – Is usually the first column in the selection grid. This column contains the hyperlink that navigates a user to the detail page. In our example, the hyperlink will navigate the user to the Lease Details page

Hidden fields:

Start Search Field – Is a hidden calculation field object that contains a value that determines whether or not the system returns records in the grid.

Setting up the selection grid contains hyperlink column:

1. Create the selection page for the table which you want to search
2. Add the DIV, spacers, and label for the page (see creating a page above).
3. Add a grid object within the DIV and select the table you want to search.
4. Add the fields to the grid that you would like to be searchable

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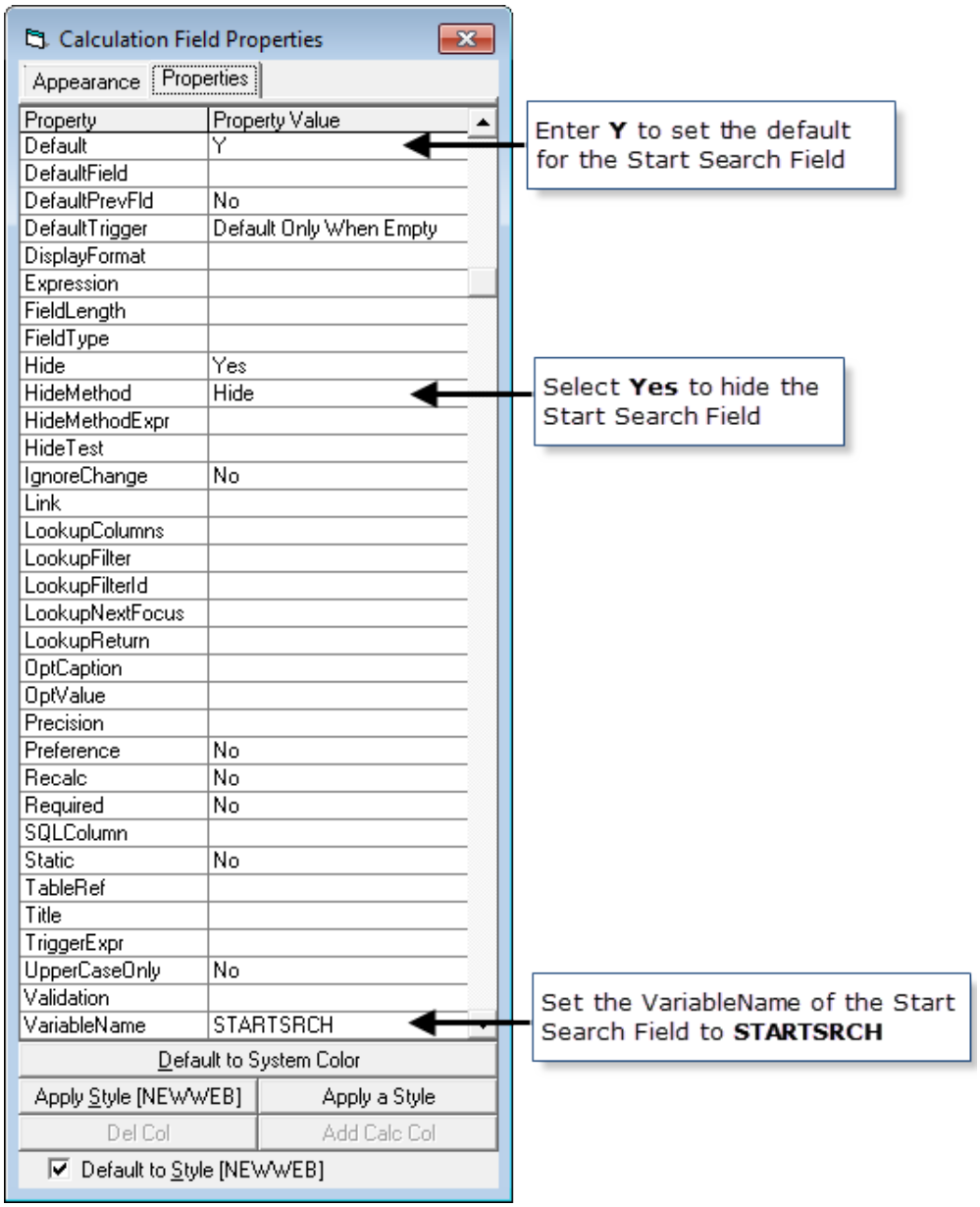
Lesson 2: Setting up the Search Fields

Follow the steps to set up a search field

1. Add a calculation field for the start search field.

Note: Since the start search field (STARTSRCH) is hidden from users in MRI for the Web, you can place the STARTSRCH anywhere on the page.

2. Open the **Calculation Field Properties** dialog box.
3. Click **Properties**, and then use the information in image below to define the properties for the calculation field.



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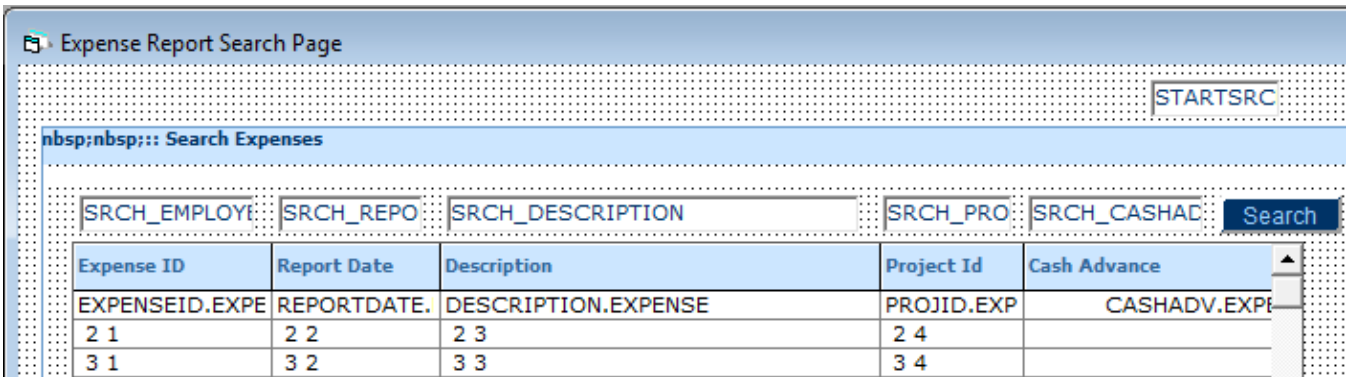
4. Add a calculation field above each of the grid columns you want the users to have the ability to search.
5. In the field for the *VariableName* property of each calculation field, assign a variable name that describes the search field.
6. Resize the *Search Fields* and grid columns so the widths of the columns are almost the same width as the search fields. The widths of the search fields need to be slightly smaller than the grid columns (see below).



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Lesson 3: Setting up the Grid to Use Search Fields

Follow the steps to setup the grid to search fields:

1. Open the *Grid Properties* dialog box.
2. Click **Properties**, and then in the field for the *GridId* property, type a name that uniquely identifies the grid or accept the default.
3. In the field for the *Query* property, enter an expression in the format of an SQL WHERE clause that defines the result to return in the grid based on the values in the search fields and STARTSRCH.

Note: Use IF{} functions to complete this property because STARTSRCH can contain either Y or N and the search fields may or may not contain values

To define the records to return in the grid on your selection page, begin by entering the following expression:

IF{[STARTSRCH]=N,1=2,1=1}

This IF{} function states that if the value in STARTSRCH is equal to Y, then append '1=2' to the WHERE clause for the grid; otherwise, append '1=1.' 1=1 is SQL syntax you can use in a WHERE clause to return all of the records in a table. 1=2 is SQL syntax you can use in a WHERE clause if you do not want the system to return any records.

The following expressions are from the Expense Report Example.

EXPENSE.EMPLOYEEID LIKE '[SRCH_EMPLOYEEID]%',}

IF{[SRCH_REPORTDATE]<>NULL,AND EXPENSE.REPORTDATE ='[SRCH_REPORTDATE]',}

IF{[SRCH_DESCRIPTION]<>NULL,AND EXPENSE.DESCRIPTION LIKE '%[SRCH_DESCRIPTION]%',}

IF{[SRCH_PROJID]<>NULL, AND EXPENSE.PROJID LIKE '[SRCH_PROJID]%',} IF{[SRCH_CASHADV]<>NULL, AND EXPENSE.CASHADV >=[SRCH_CASHADV],}

The remaining IF{} functions each state that if the search field is not equal to null, then append an AND condition to the WHERE clause that filters the records by the value in the search field; otherwise, do not append anything to the WHERE clause. Therefore, if a user types **X** in the *Project ID* search field, the system applies the following SQL statement to load data into the grid:

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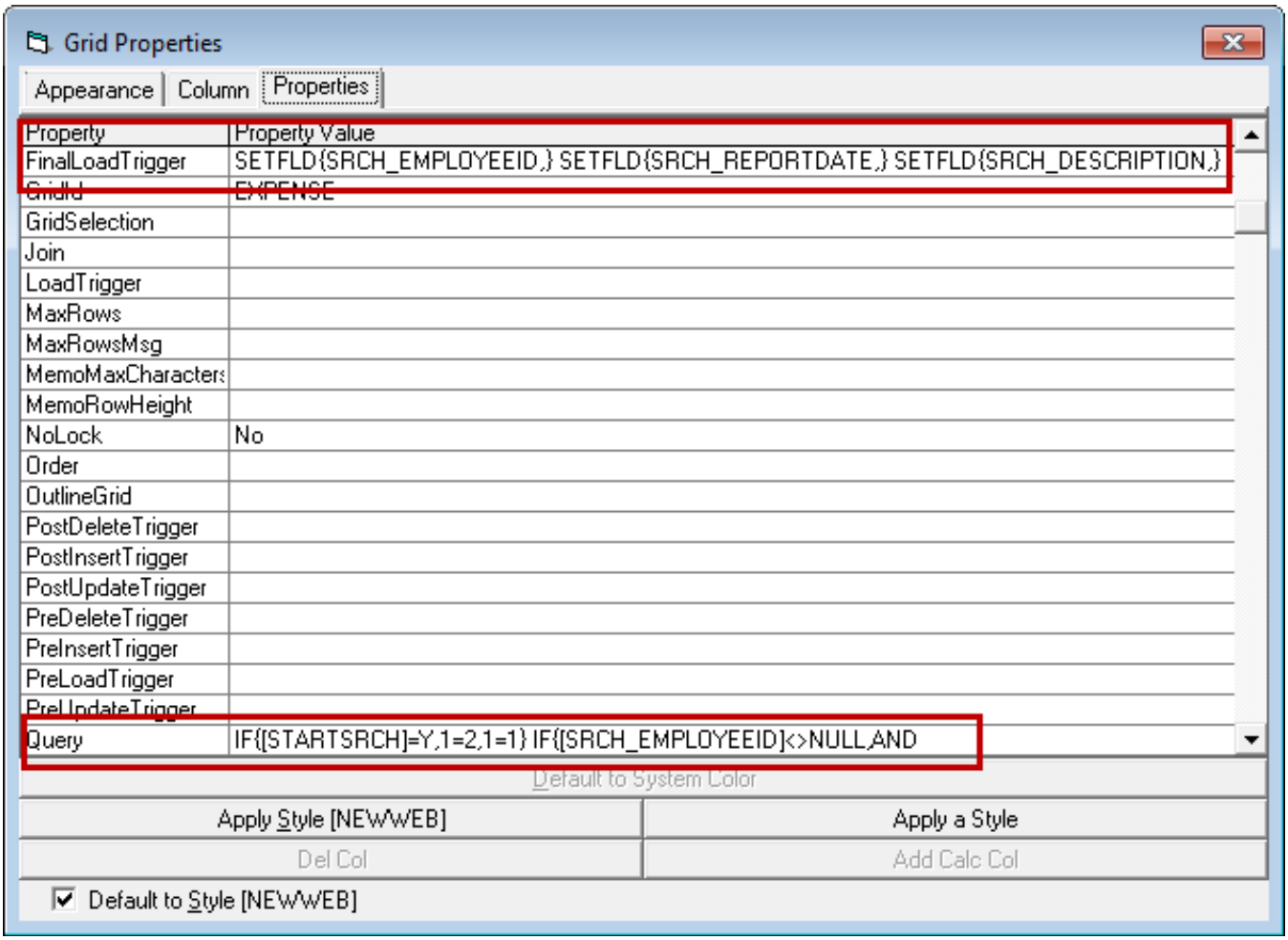
SELECT * FROM Expense WHERE 1=1 AND EXPENSE.PROJID LIKE 'X%'

4. In the field for the *FinalLoadTrigger* property, type the following expression to set the *Search Fields* to null and set the **STARTSRCH** field to **N** each time the grid finishes loading on the page

   SETFLD{STARTSRCH,N} – Sets Start Search Field to N
   SETFLD{**Name of Field**,} – Sets your search field equal to Null

Note: You will need to do this for all of your search fields



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Lesson 4: Setting up the Search Button

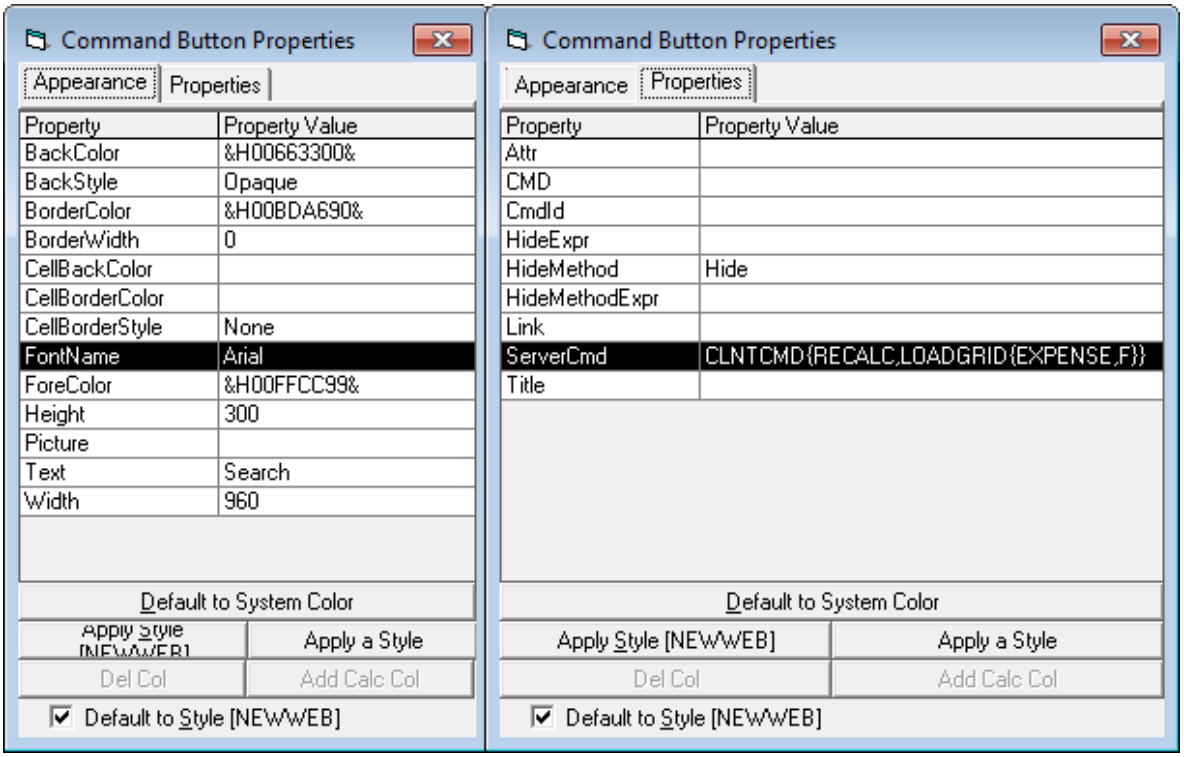
Follow the steps to setup the search button

1. Add a command button to the search page, then open the Command Button Properties dialog box.
2. Click **Appearance** tab, and then in the field **Text**, type Search.
3. Click **Properties** tab, and then in the field **SERVERCMD**, enter the following expression:

   CLNTCMD{RECALC,LOADGRID{EXPENSE,F}}

Note: The **SERVERCMD** expression details an expression to be executed on the server. If a value is entered here, any expression entered into the **CMD** field will be ignored

4. On the **File** menu, click **Save** to save the page.



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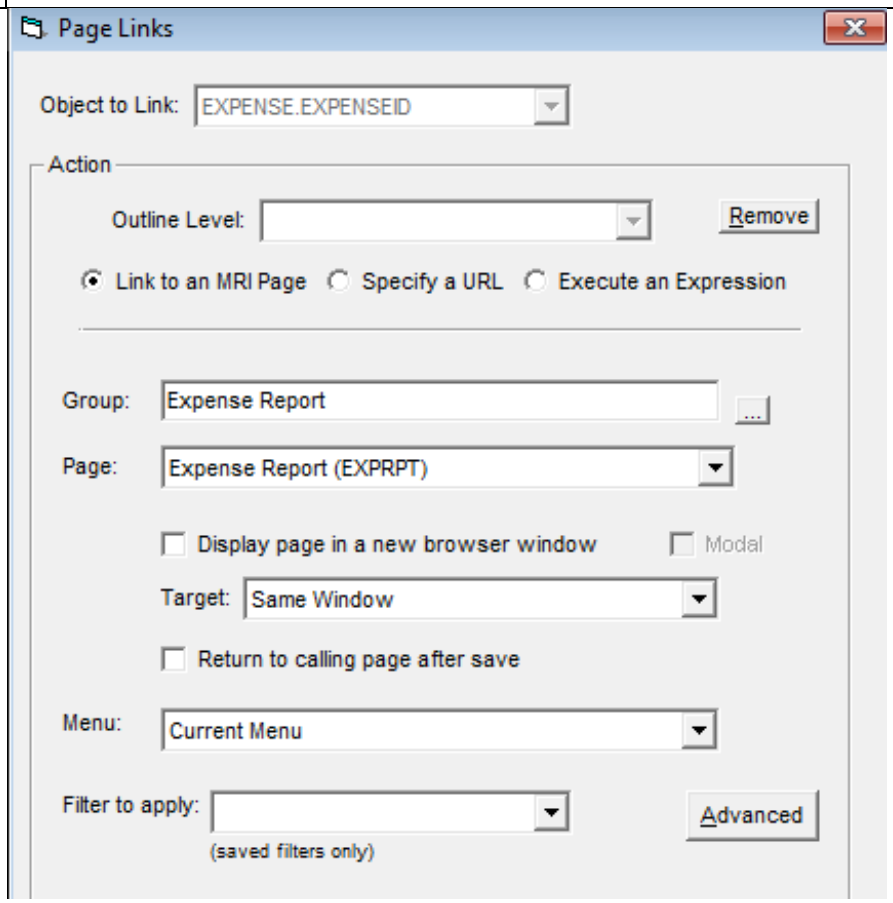
Lesson 5: Setting up the Hyperlink

Follow the steps to setup a hyperlink that will open up the chosen record from the search screen.

1. Select the grid column that you would like to place the link in and open the properties dialog box.
2. Double click on the **Link** property in the Column Tab. This will open up the **Page Links** dialog box
3. In the **Action** area on the Page Links dialog box, click the **Link to MRI *Page*** option button to display the applicable fields and then define the fields in the following table:

Field	Action
Group	Select the Activity Group where the page you want to link to is located
Page	Select the destination page from the previously selected activity group
Menu	Select the Activity Group Menu that you want to appear on the destination page



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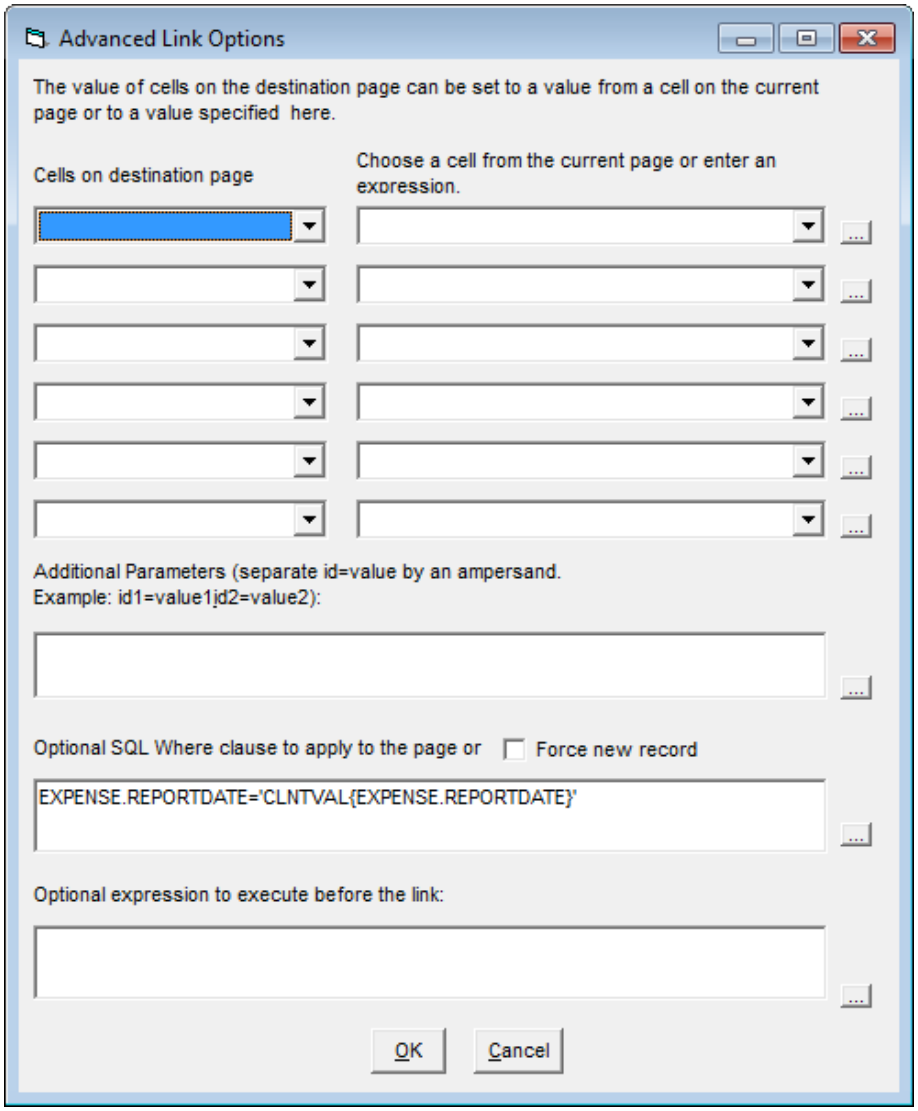
4. To define any of the advanced actions for the link, click **Advanced** to display the Advanced Link Options dialog box



5. Click OK.
6. Click Save.

Congratulations! You have completed setting up a Selection and Lookup page!

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Module 7: Linking Pages in MRI Web

Purpose

The purpose of this module is to show you how to link pages modify page links, and how to create a frame page in MRI Web Design

Objectives

After completing this module, you will be able to:

- Create a button to link to other pages
- Create a hyperlink to link to other pages
- Modify page links
- Create a frame page and add tabs to existing frame pages

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Lesson 1: Creating Links to Pages

Purpose

The purpose of this lesson is to show you how to link pages in MRI web through button or hyperlink

Objectives

After completing this lesson, you will be able to:

- Create a button to link to other pages
- Create a hyperlink to link to other pages

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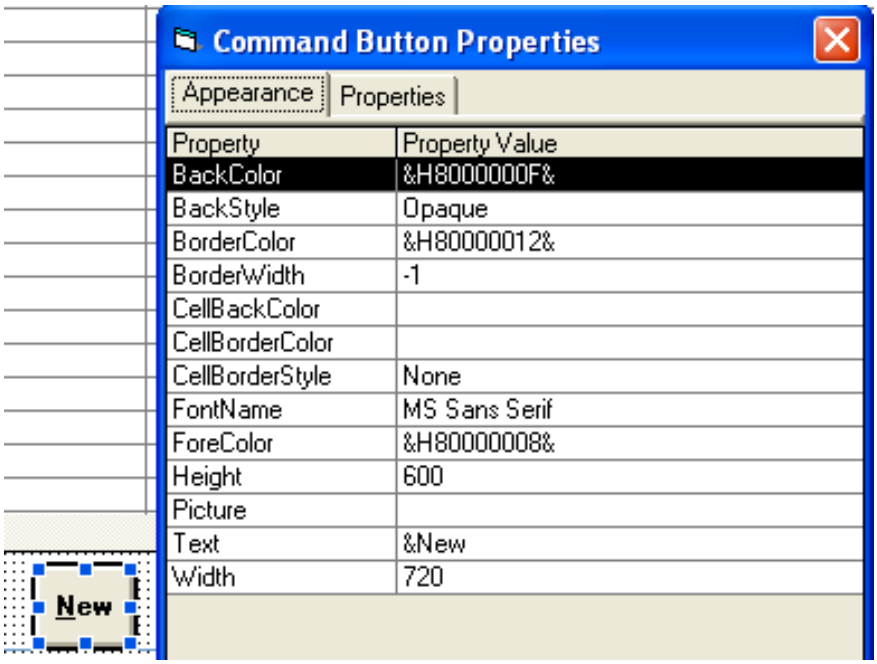
Add Button to link to other page

To add a button to a page:

1. Add a button to the page at the desired location. Set the **Text** property to **&New**.



2. Double click the **Link** property and open the **Page Links** page

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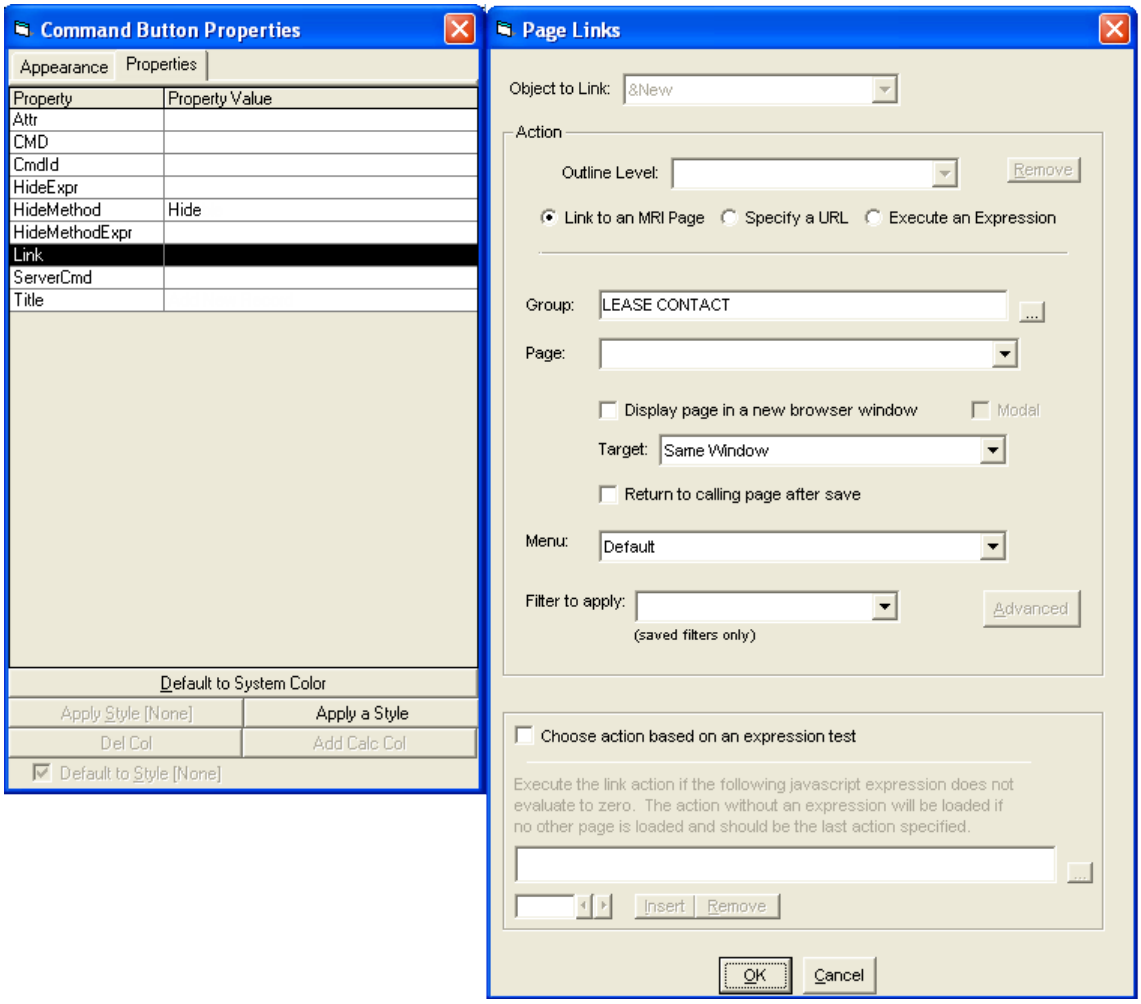

3. Set up the page by input the following information:
   a) Object to Link: this is the name of the button. This field is not editable.
   b) Action filed: this field specify the behavior of the button.
   c) Link to an MRI Page: if you want the new button link to an existing MRI page, select this option
   d) Group: the activity group which the page belongs to.
   e) The page: select the page that you want the button links to
   f) Display page in a new browser window: do you want the page to be a pop up window
4. Click OK.
5. Click OK.
6. Click Save.

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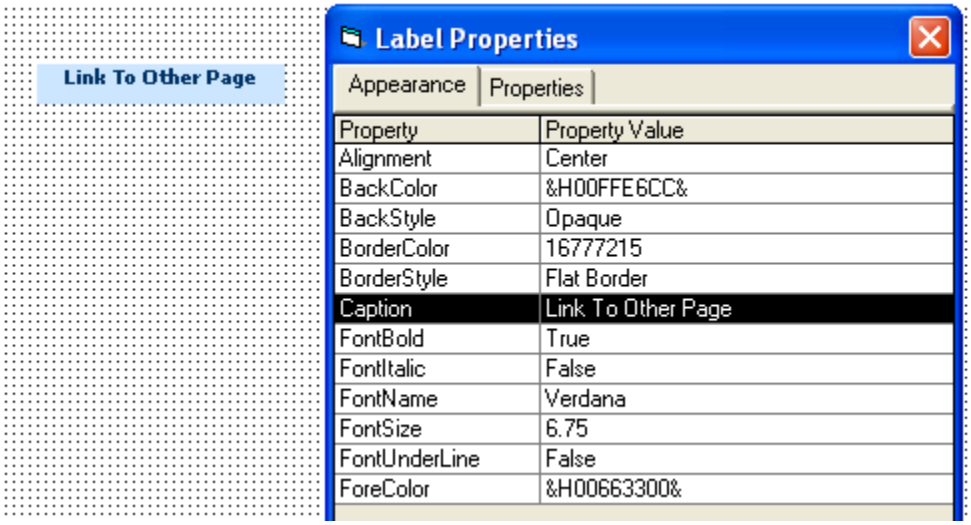
Add Hyperlink to link to other page

1. Add a **label** to a page, and set the **Caption** property to **Link To Other Page**.



2. In the ***Properties*** tab, click the **Link** property to display the **Page Links** page.
3. Use the information in previous session to define the link

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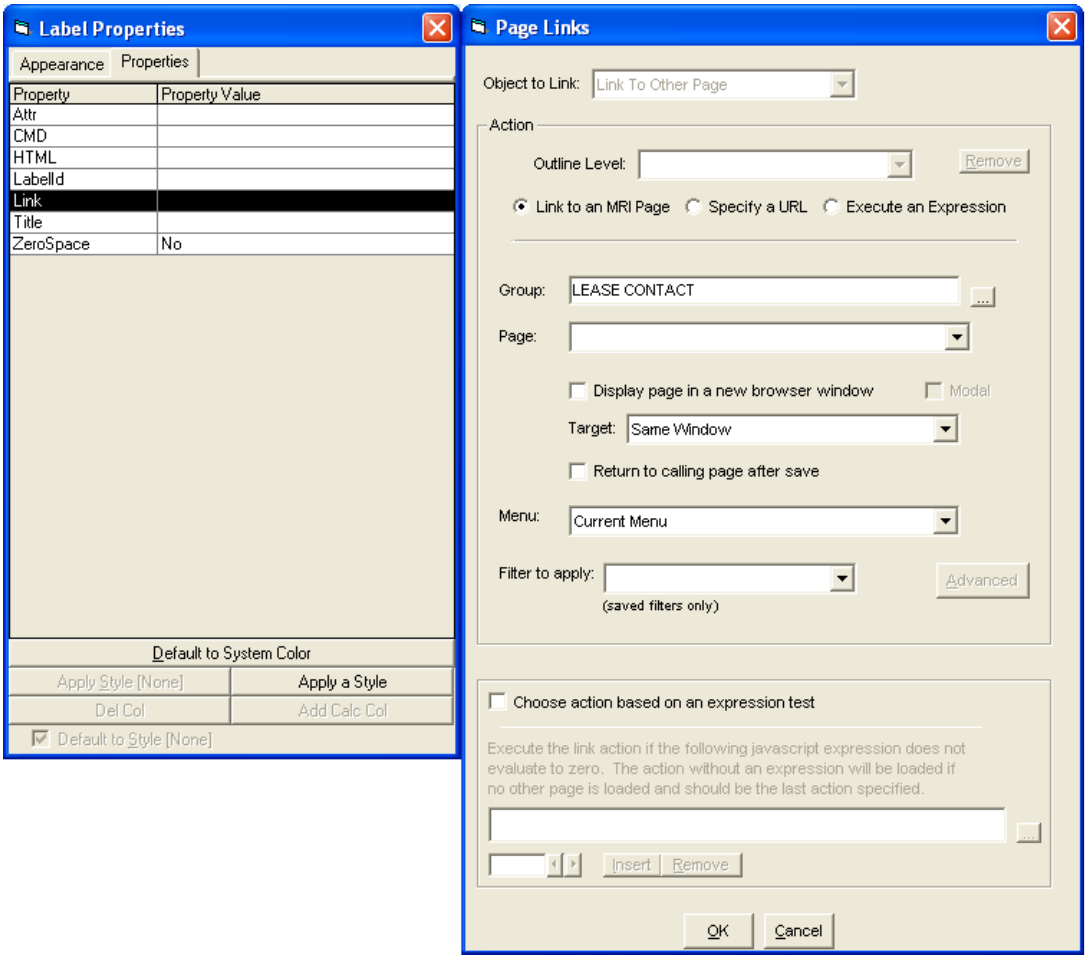
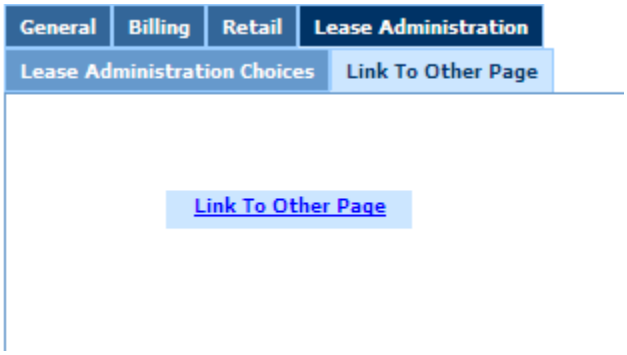


4. Click OK.
5. Click OK.
6. Click Save.

The completed Link page in MRI web



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Lesson 2: Creating a Frame

Purpose

The purpose of this lesson is to show you how to add a frame to a page in MRI Web Design.

Objectives

After completing this lesson, you will be able to:

- Create a new frame
- Add tabs to a frame
- Edit an existing frame

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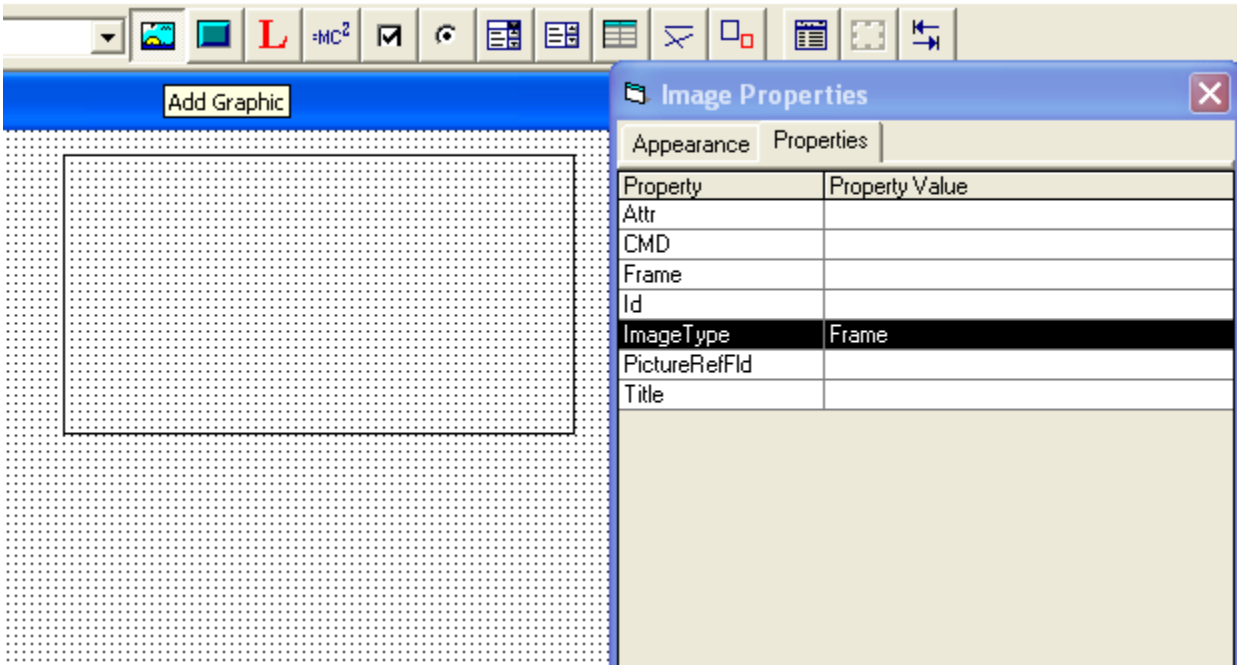
Create a frame and add tabs to the frame

To create a frame

1. Add a **Graphic** to the page. Open the **Properties** tab and set the **ImageType** to Frame.



2. Double click the **Frame** property and open the **Define Frame Attributes** page
3. Set up the Frame attributes:
   a. Set up **Tabs**
      i. On the **Tabs** tab, click the **Insert Tab** button
      ii. Enter **Tab ID, Tab Text**, and **Link**

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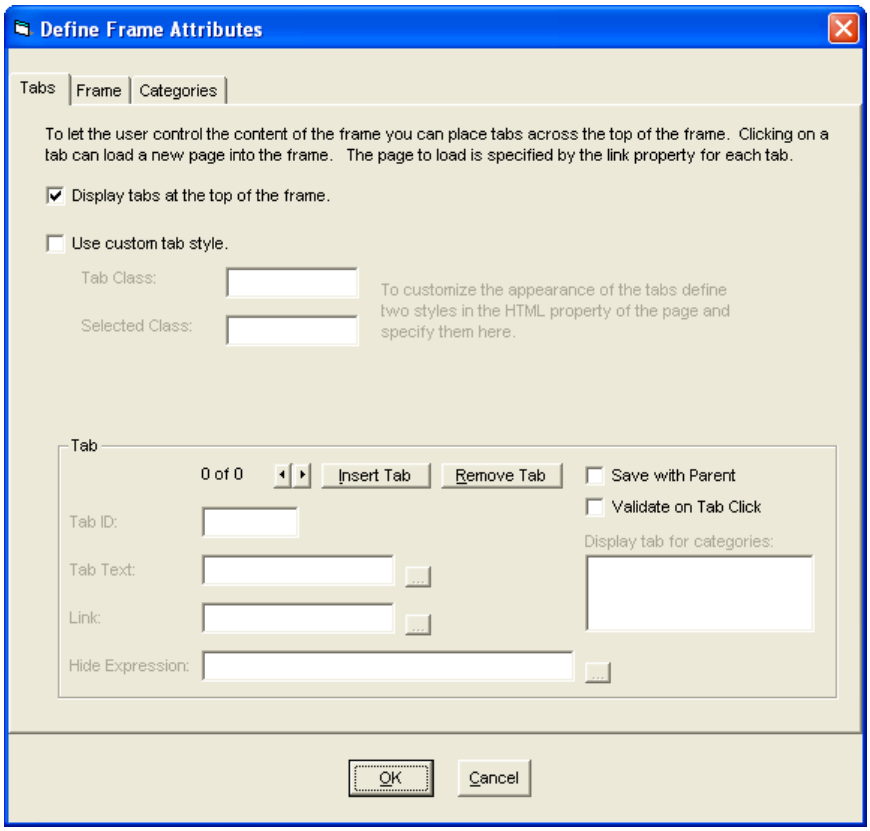
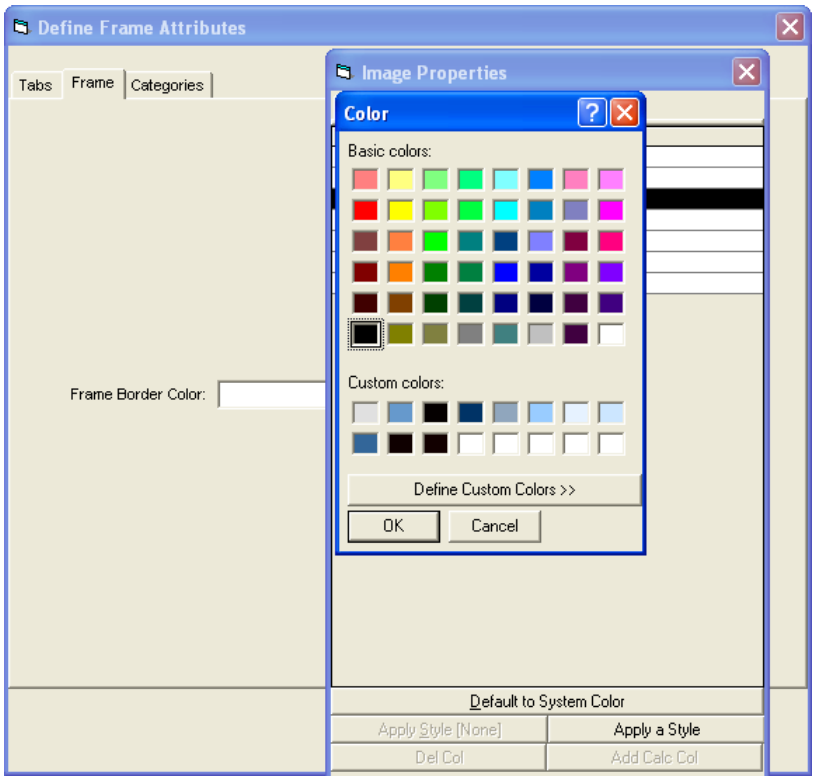


b. To modify the frame color, open the **Frame** tab and choose a color



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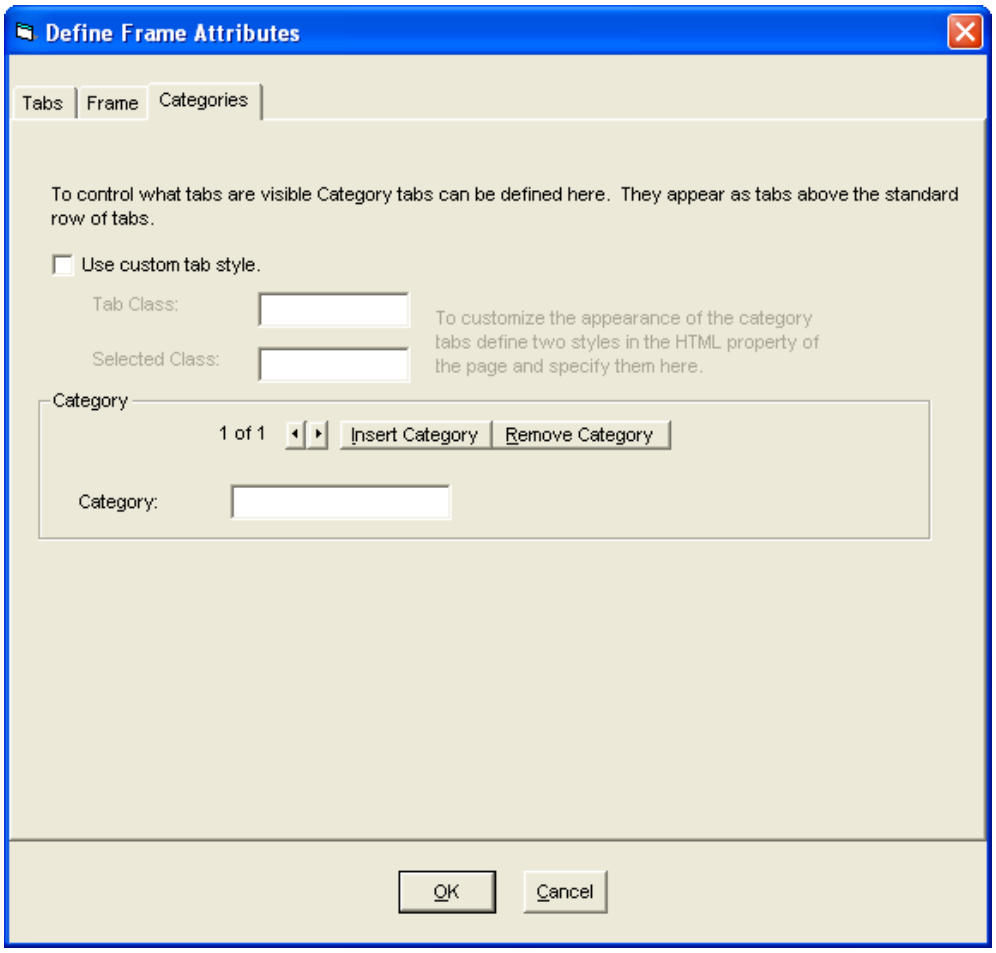
c. Open the **Categories** tab and click Insert Category



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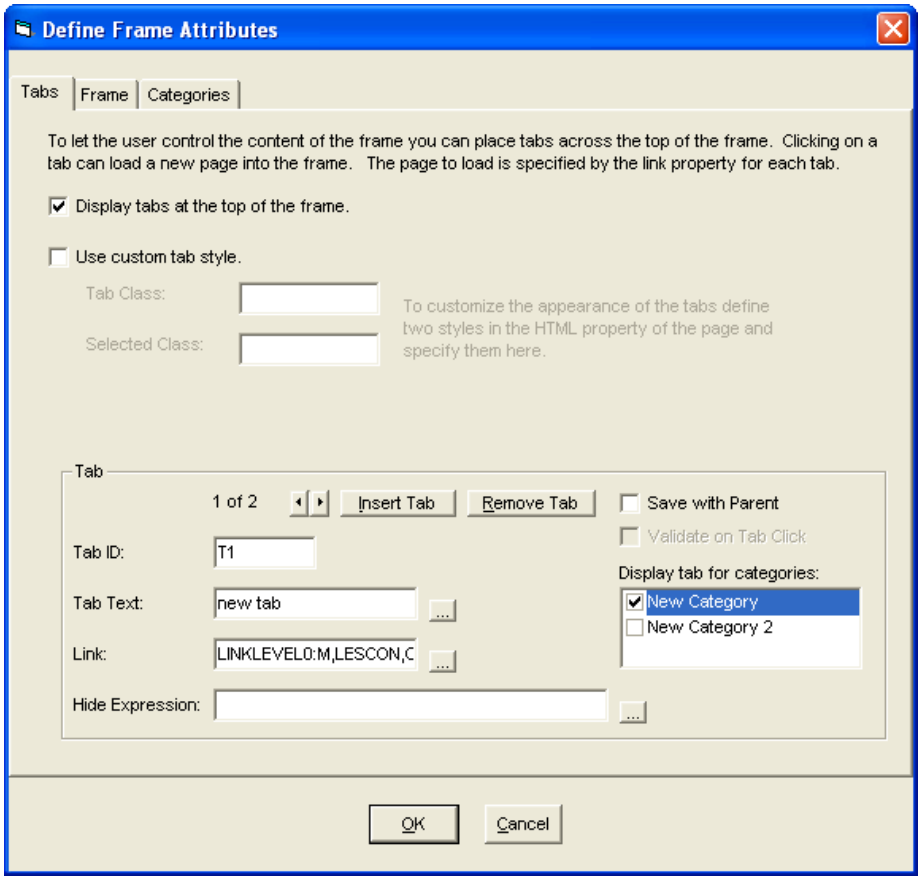
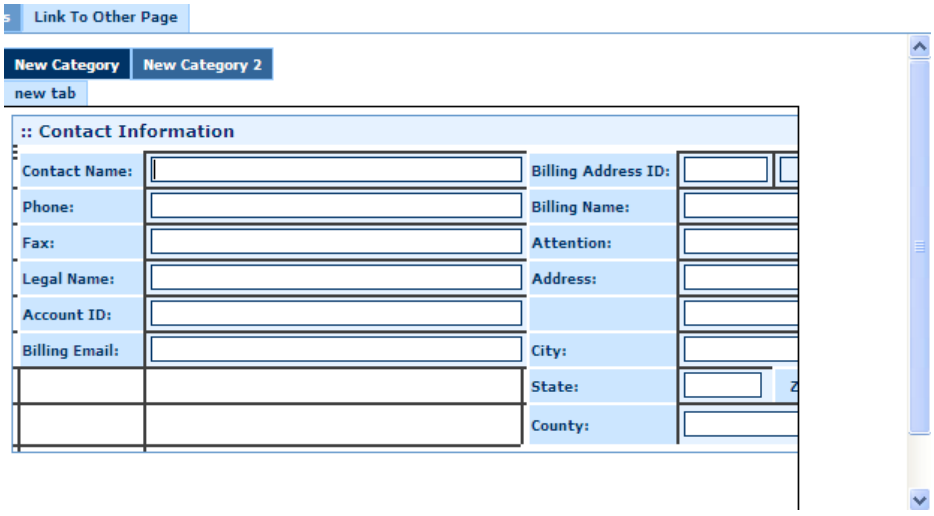
d. If the tab is grouped by categories, move back to **Tabs** tab to select the category for the tab



e. Click **OK**

f. **Save** changes

The web page view



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Module 8: Setting Up MRI for Web Menus

Purpose

The purpose of this module is to introduce you to menus in MRI Web Design

Objectives

After completing this module, you will be able to:

- Create a new Activity Group menu
- Create a new menu item
- Define actions for Web Menus
- Edit the Master Menu

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Lesson 1: Creating Activity Group Menus

Purpose

The purpose of this lesson is to show you how to create Activity Group Menus in Web Design

Objectives

After completing this lesson, you will be able to:

- Create an Activity Group Menu
- Create a new Menu Item
- Define Actions for Menu Items
- Edit Activity Group Menus

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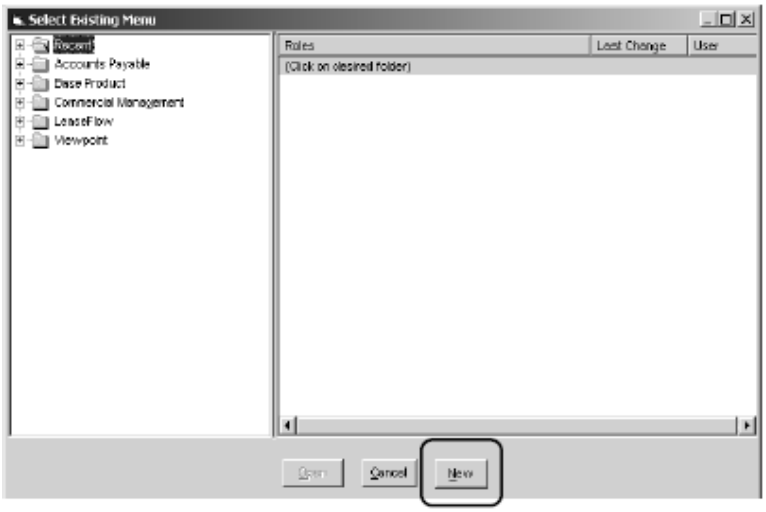
Creating Activity Group Menus

When you create a new activity group menu, you define the default menu structure. The system applies the default menu structure in MRI for the Web for all roles unless a role-specific menu is defined for the user's role. Additionally, the default menu structure is a template for the role-specific menus you create for the activity group

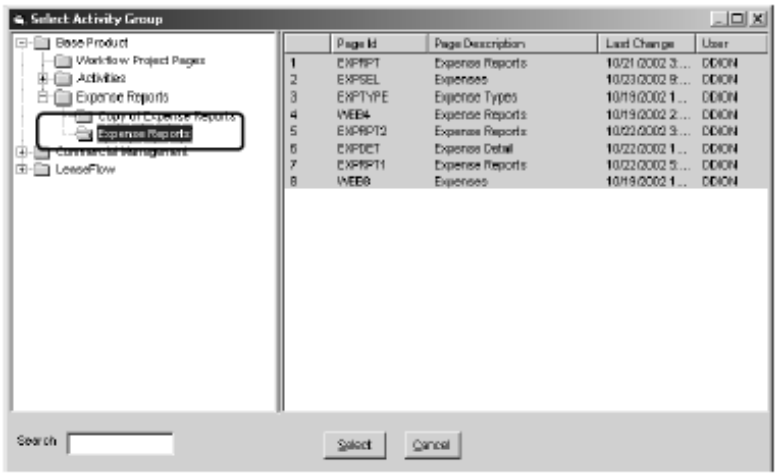
You must define the default menu structure before you can create a role-specific menu.

To create an activity group menu:

1. On the **File** menu, click **Customize Menus** to display the *Select Existing Menu* dialog box.
2. Click **New** from the *Select Existing Menu* dialog box.



3. In the left frame, click next to the application folder that contains the activity group for which you want to create a menu (see below) and click **Select**.



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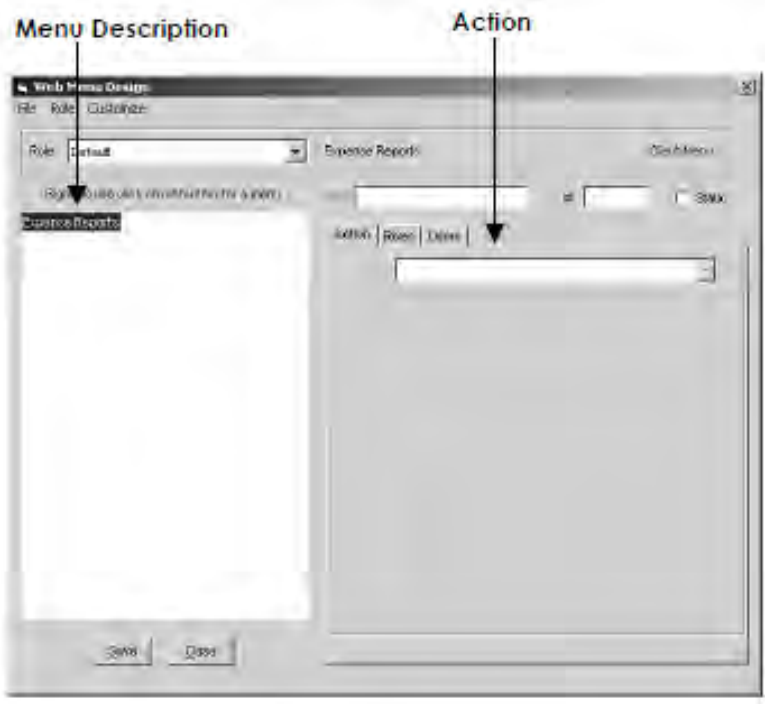

Creating New Menu Items

To add a new menu item

1. Right click on an existing menu item near where you want to add the new menu item.
2. On the menu that appears, click –
   a. **Insert New Item Above** to insert the new menu item above the menu item you clicked
   b. **Insert New Item Below** to insert the new menu item below the menu item you clicked
   c. **Insert New Child Item** to insert the new menu item as a child item of the menu item you clicked

Notes: When you create the first menu item for a new activity group menu, only the **Insert New Child Item** command is available because the menu description must be at the highest level in the menu structure. When you add a new menu item to an MRI-defined menu, the system changes the color of the menu item text to green to indicate it is a custom menu item.

3. Select **Insert New Child Item** from the menu and type a name for the child menu item.

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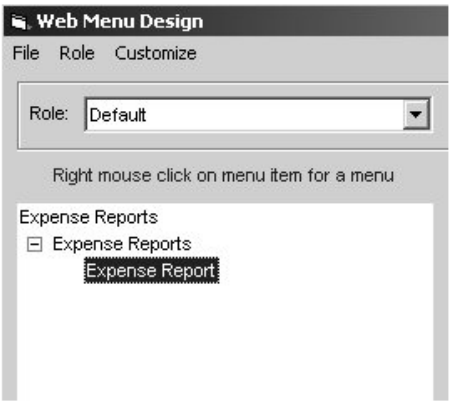
4. Right click on the newly created menu item. You can now select to either **Insert New Child Item, Insert New Item Below, Insert New Item Above**, or to **Insert Separator Below.** Use these commands to build out the link structure of your Activity Group Menu



Defining Actions for Menu Items

The *Action* tab on the *Web Menu Design* view enables you to set up the action you want the menu item to execute. You can set up a menu item to -

- Have no action
- Load an MRI Web Page
- Link to an outside URL
- Execute an expression
- Link to an activity group menu, if the menu item is on the master menu
- Open the last home page a user accesses, if the menu item is on an activity group menu

To set an action for a menu item:

1. Select the desired menu item.
2. In the *Action* field, select the desired action to display the applicable fields.
3. Use the information in the table below to define the menu item that opens the destination page.

Field	Action
Group	Select the Activity Group where the page you want to link to is located
Page	Select the destination Page
Choose Page Checkbox	Displays a page if the following javascript expression does not evaluate to zero.
URL	Enter the URL for the outside webpage

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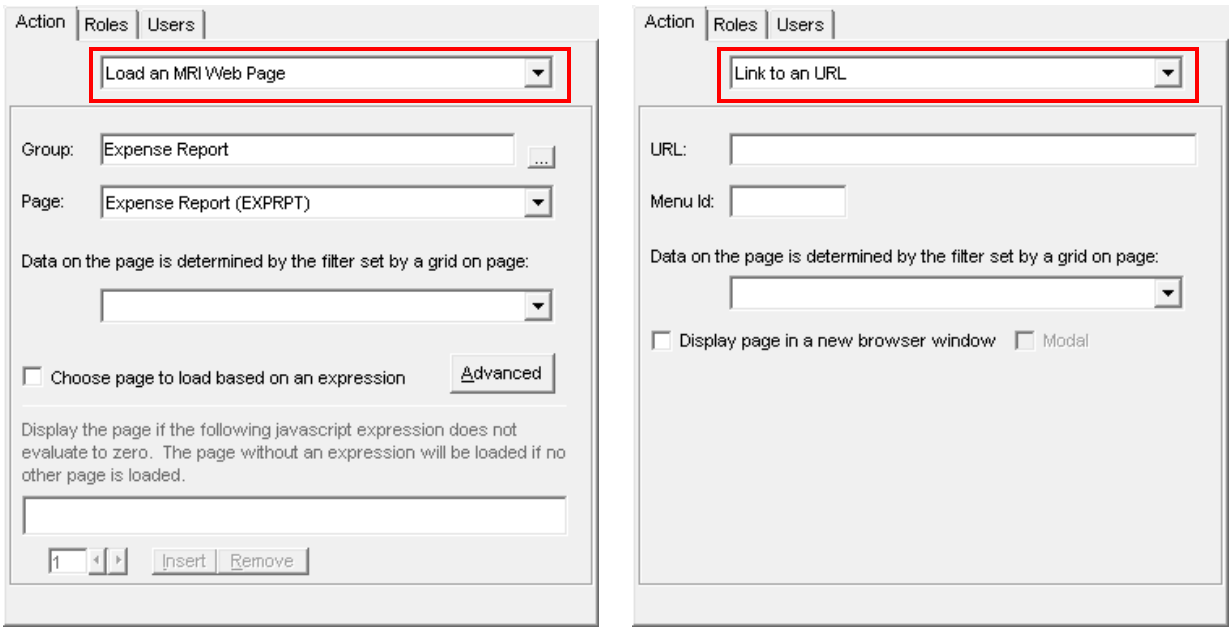
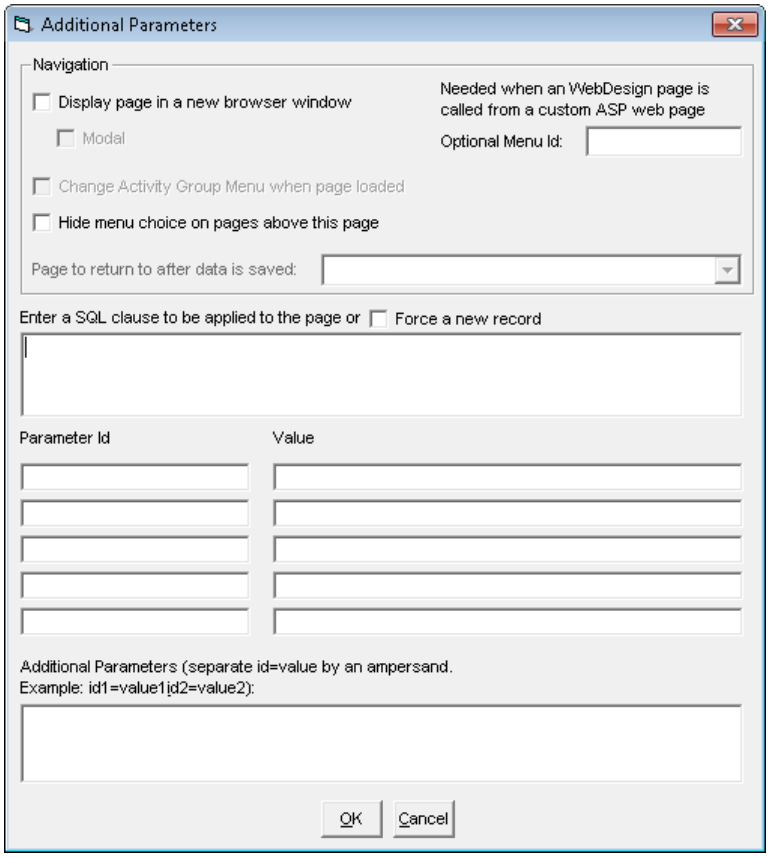


4. If adding a link to an MRI page, click on the **Advanced** button to open the advanced options for the menu item.



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Field	Action
Display Page Checkbox	Check if you would like the page to open in a new window
Hide Menu Choice Checkbox	Hides the menu choice on the pages about that page
Force a new record Checkbox	Select if you want the menu item to open the destination page for data entry

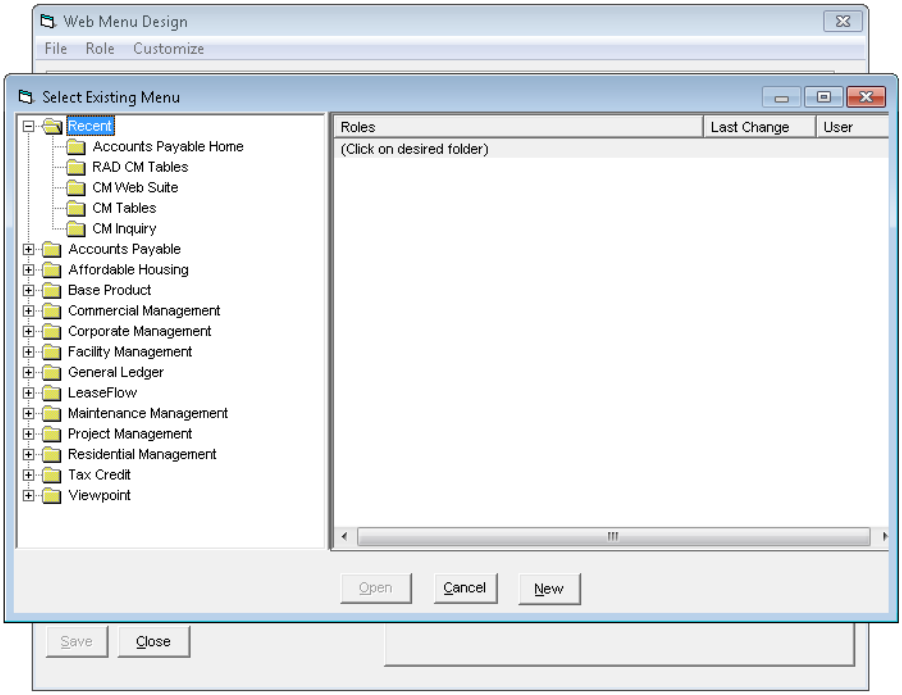
5. Select the desired options and click **OK**
6. Click **Save**

Editing Menus in Web Design

Standard Activity Group menus in Web can be edited in the **Customize Menus** screen. Application home screens can also be edited here as well

To edit an Activity Group Menu:

1. On the **File** menu, click **Customize Menus** to display the *Select Existing Menu* dialog box.



2. From this screen, select the Activity Group or Application Home Screen menu that you would like to edit

Note: Activity Home Screen Menus will be named with the name of the application and have "home" following it. Ex. Accounts Payable Home, Commercial Management Home

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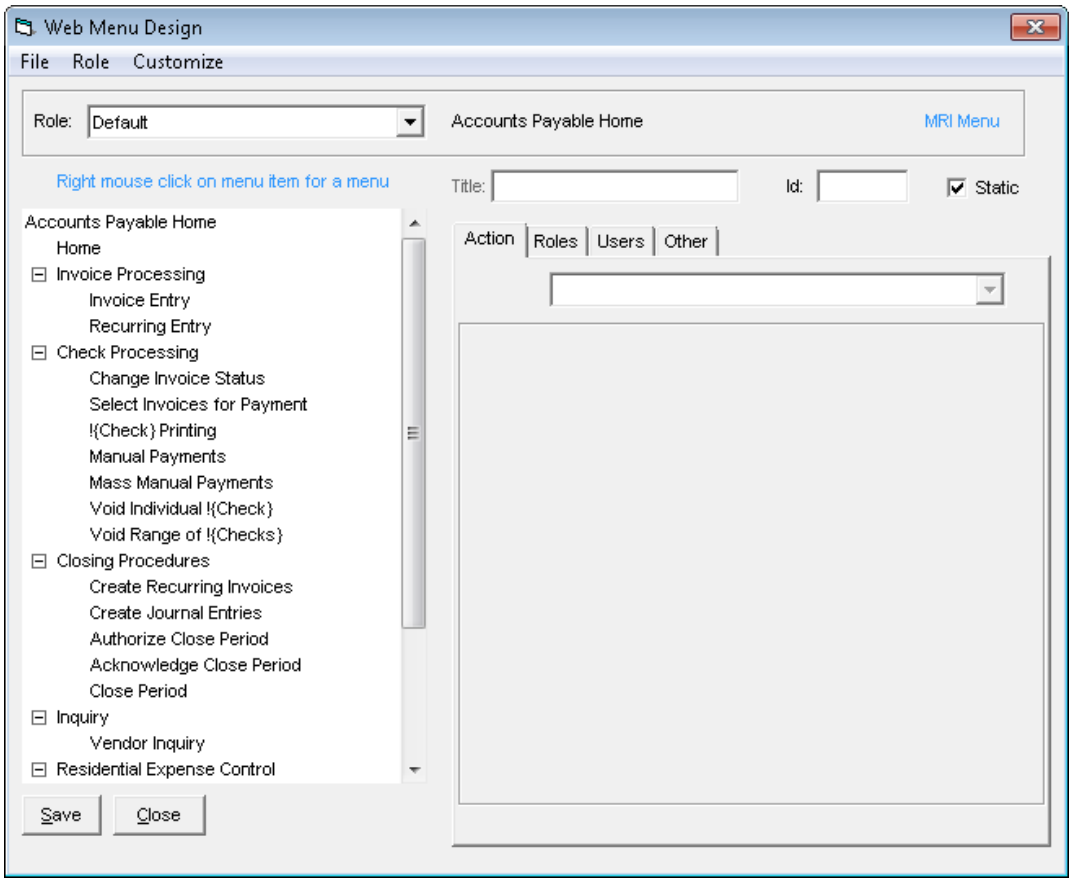
3. Once you have opened the menu, you can add menu items in the same way described in the previous section.

4. To edit a menu item, right click the menu item and click **Customize**. You will not be able to edit the menu item



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Lesson 2: Editing Master Menus

Purpose

The purpose of this lesson is to show you how to edit the Application Menu, Global Navigation Menu and the Setup and Maintenance Menu in MRI Web Design.

Objectives

After completing this lesson, you will be able to:

- Edit the Application Menu
- Edit the Global Menu
- Edit the Setup and Maintenance Menu

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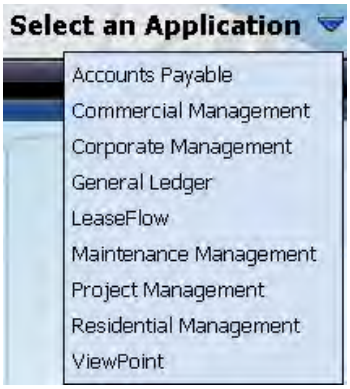
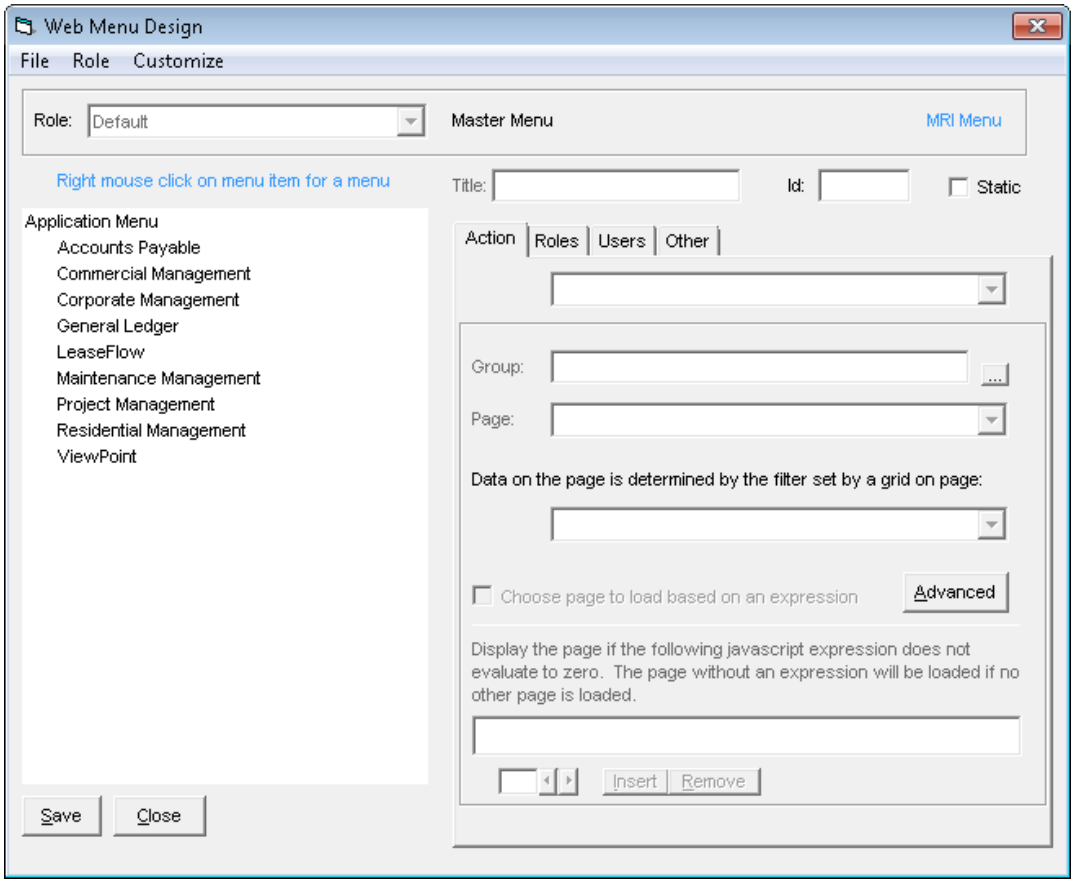
Editing the Application Menu



To edit the Application Menu:

1. On the **File** menu, click **Customize Menus** to display the *Select Existing Menu* dialog box. Click **Cancel.**
2. On the **File** menu in **Web Menu Design**, click **Open Application Menu.**



3. You can now edit the applications that appear in the Application Dropdown Menu that shows at the top of every screen in MRI for Web

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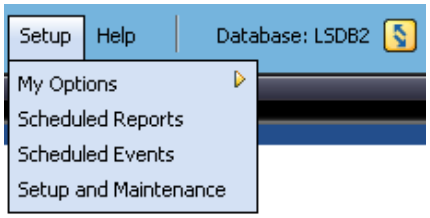
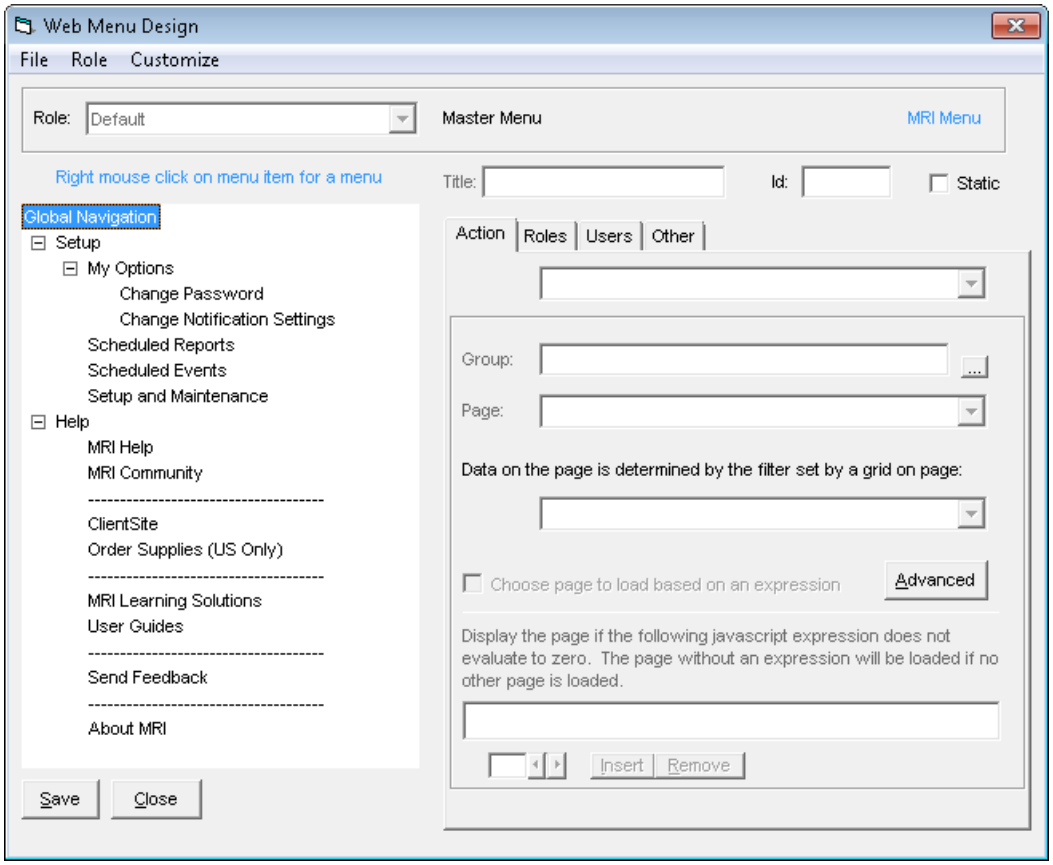
Editing the Global Navigation Menu



To edit the Global Navigation Menu:

1. On the **File** menu, click **Customize Menus** to display the *Select Existing Menu* dialog box. Click **Cancel.**
2. On the **File** menu in **Web Menu Design**, click **Open Global Navigation Menu.**



3. You can now edit the options that appear in the Setup and Help Menus that show in the top left of every screen in MRI for Web

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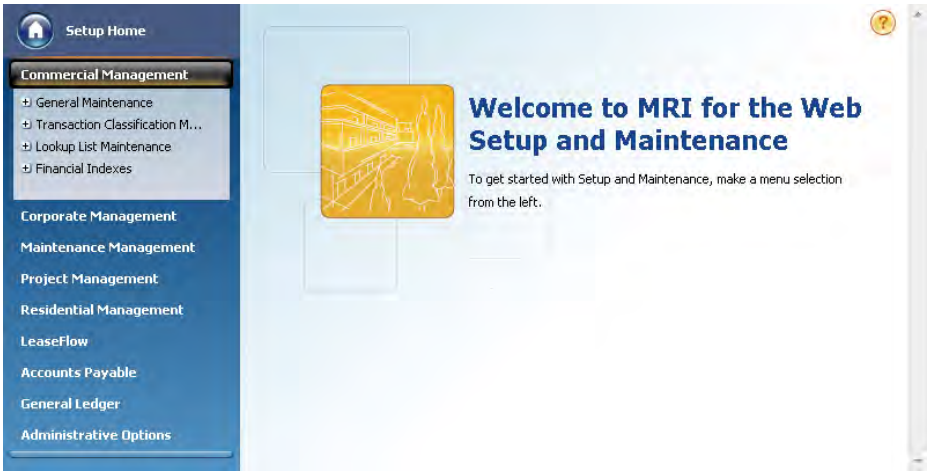
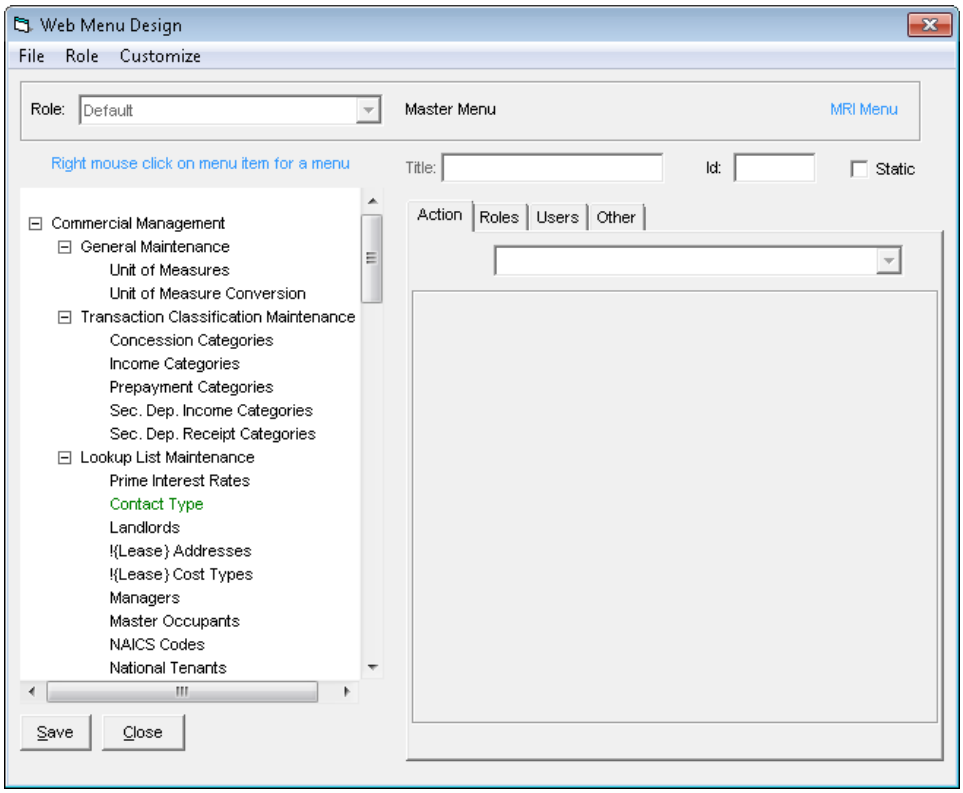
Editing the Setup and Maintenance Menu



To edit the Setup Menu:

1. On the **File** menu, click **Customize Menus** to display the *Select Existing Menu* dialog box. Click **Cancel.**
2. On the **File** menu in **Web Menu Design**, click **Open Setup Navigation Menu.**



3. You can now edit the options that appear in the Setup and Maintenance Menu

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Module 9: Web Enabling a Report

Purpose

The purpose of this module is to provide you with the information that you need to Web-enable a report.

Objectives

After completing this module, you will be able to:

- Set up custom report options in Web Design
- Make reports available through MRI for Web interface
- Web-enable a report

Before You Begin

If a report is Web-enabled and put out on the Web, it may have to be changed if the underlying structures are different. Web-enabling reports is more than just putting a runtime option on it and putting it out on the web.

Some issues to keep in mind include:

- Downloading to Excel is different between Web and Windows.
- Importing and exporting to the Web is difficult because there is no FILECOMMONDIALOG. You can only import/export reports off of the Web server.

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Lesson 1: Setting Up Custom Report Options in Web Design

Purpose

The purpose of this lesson is to show you how to set up custom report options in Web Design.

MRI for Windows reports work in both the Windows and Web interfaces without having to change the ReportDesign. However, when a report contains custom report options, then those custom report options need to be set up in Web Design.

Objectives

After completing this lesson, you will be able to set up custom report options.

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Setting Up Custom Report Options

Overview

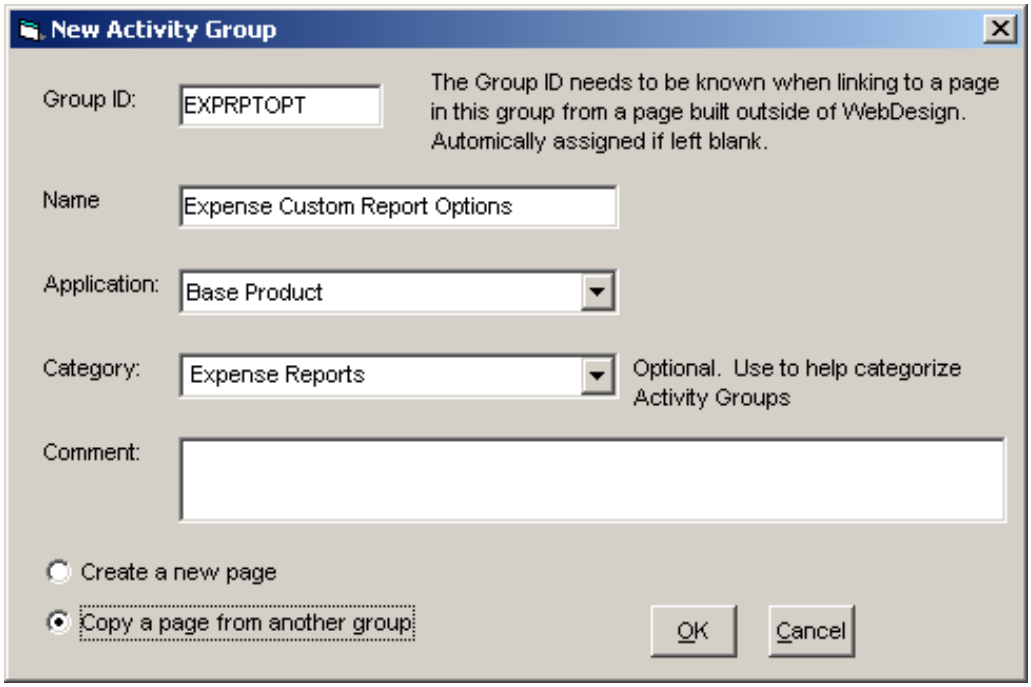
This section describes how to create a report page containing the parameters for a single report and how to make the pages available to Web users.

You can create a report page in Web Design that contains the parameters for a single report. Also, you can set up a virtual report page. A *virtual report* is a page from which users can run more than one report. By creating virtual report pages, you can group reports that share similar run-time parameters. Combining reports reduces the number of entries in the My Reports listing on the master menu, which make MRI for the Web easier to navigate.

Procedure

Complete the following steps create a custom report page that contains report parameters:

1. Select **File > New Activity Group.** The **New Activity Group** dialog box appears.
2. Complete the applicable fields.
3. Click **Copy a page from another group**, and click **OK**



The **Copy Page** dialog box appears.

From here, you can copy from an activity group or a Windows view (if you click the Windows Views checkbox).

4. Check the **Windows Views** checkbox.
5. Select the **EXPRPT**, and click **Copy.**
6. Click **Close**.

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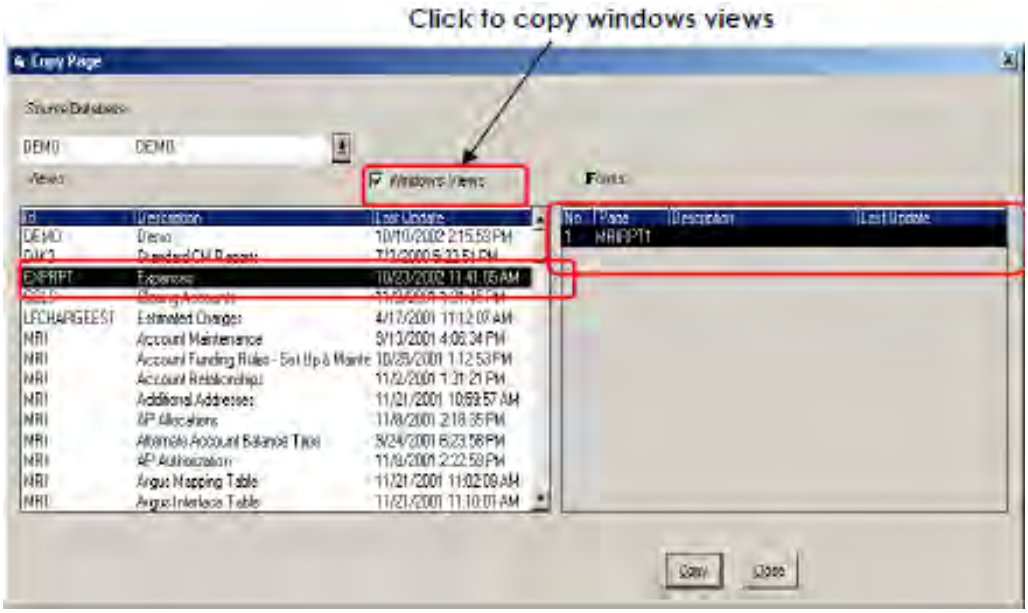
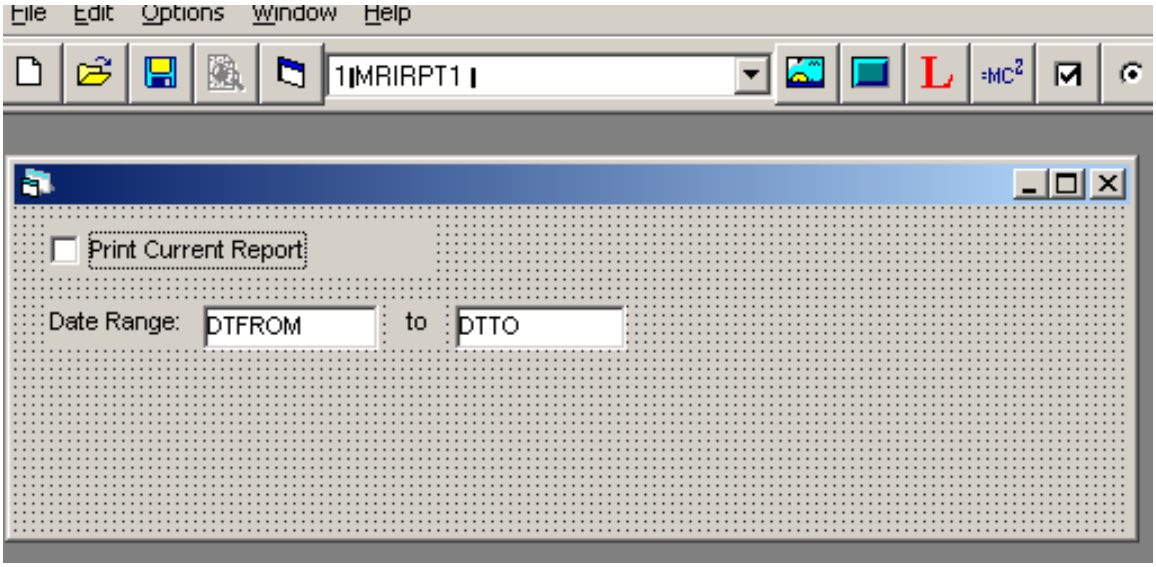


7. Click the **Calculation** icon and draw the object on the page. Add the DIV and spacers to the page.
8. Select **Options > Select Current Object Style > NEWWEB** (or **WEBRPTS**)



9. Highlight all objects on the page and click **Apply Style** from the properties dialog box.
10. Right-click on the object and select **Display Properties**.
11. When the **Form Properties** dialog box for the form appears, click the **Properties** tab.
12. Select **Yes** for the value of the **ReportOption** property value

> **Important:** Setting the *ReportOption* property to Yes is required when creating custom report option pages.

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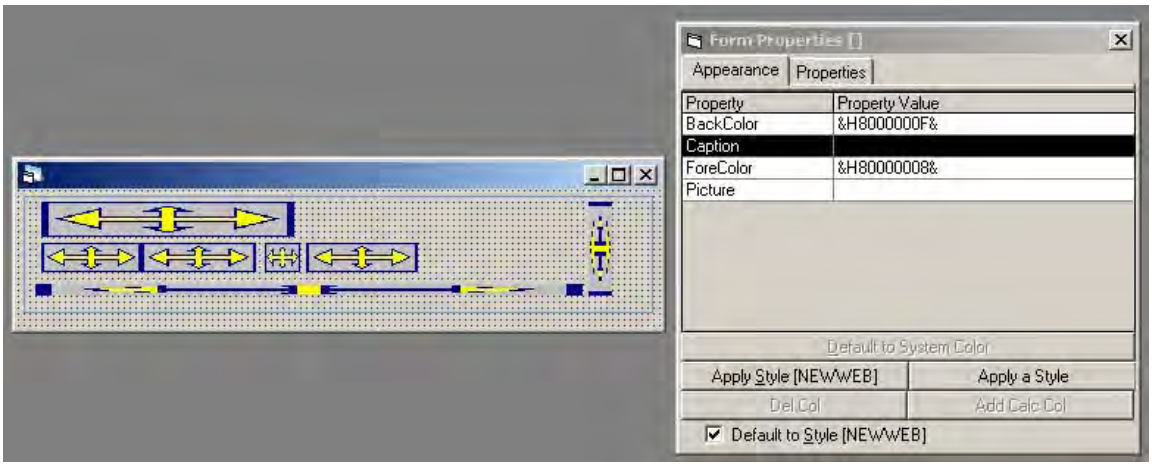

13. Click **Save.**

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Lesson 2: Making Reports Available through MRI for Web Interface

Purpose

The purpose of this lesson is to teach you how to make reports available through MRI for Web interface.

Objectives

After completing this lesson, you will be able to make reports available to Web users through MRI.

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Making Reports Available Through MRI for Web Interface

Overview

For custom or MRI-supplied report pages created in Web Design, you can specify which ones to include in MRI for the Web. Of the reports you make available in MRI for the Web, you can further define which reports are available to each user class. These features enable you to make available only the reports that each user needs.

You must know how to use Web Design to put something on the Web. Web Design contains pages, not views. There are also Activity Groups. You can understand all of the valid Application IDs by searching the MRI RPT table for the various types of Application IDs.

You cannot Web-enable an MRI report. You can right-click the report, but it does not allow you to add runtime options. If you want to Web-enable an MRI report, first copy it, then Web-enable it.

When you create the runtime options to run a report on the Web, they can be created from scratch. You can copy runtime options from Windows as a starting point.

The toolbar in Web Design is the same as in ViewDesign, with a few slight differences:

- You can draw a box around the objects to keep them altogether in Web Design
- Spaces (DIVS) have to be inserted in Web Design. This keeps fields together and organized for spacing purposes

> **Note:** The variable name in Windows and in Web must be named exactly the same. If they are the same, it will work on the Web.

Procedure

Complete the following steps to make a report available to Web users:

1. Select **File > Web Reports** to display the *Web Reports* dialog box.
2. On the left side of the dialog box, select the **All Reports** folder.

   The reports in the folder appear on the right side of the dialog box.
3. Select the checkbox next to the **EXPENSERPT** report ID to make the report available in MRI for the Web.

> **Note:** Sometimes a report may not show up in the desired report list. If a report is not listed, in ReportDesign, select **Edit > Report Options**. On the Report Settings tab, review the Application ID field. If this field is blank or if the ID is not valid, then the report cannot be Web-enabled.

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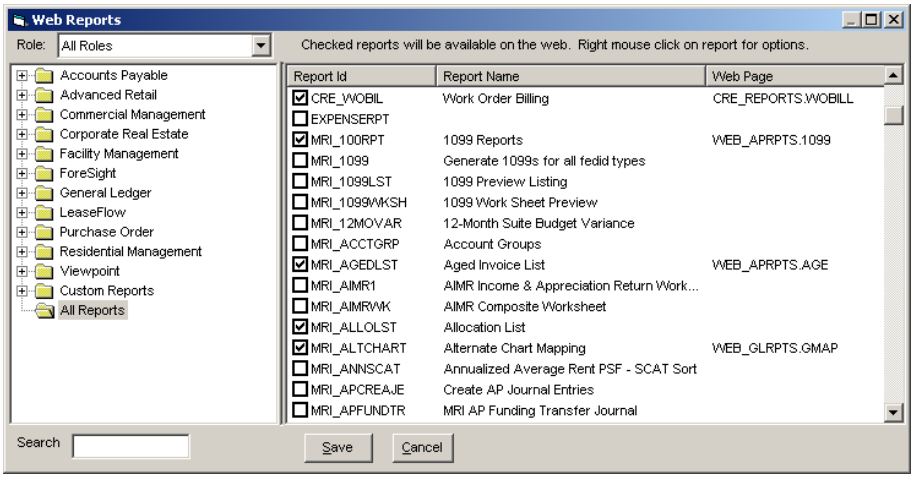
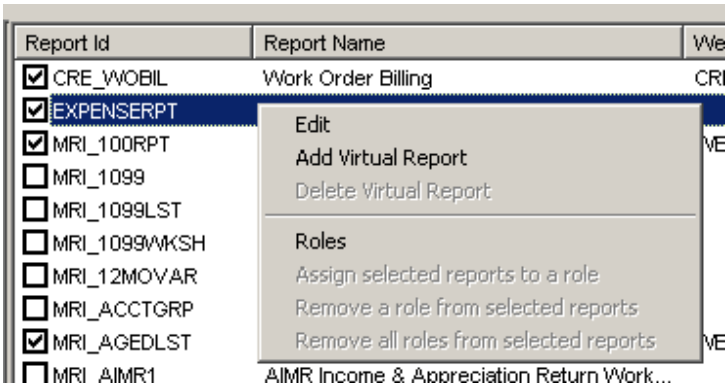
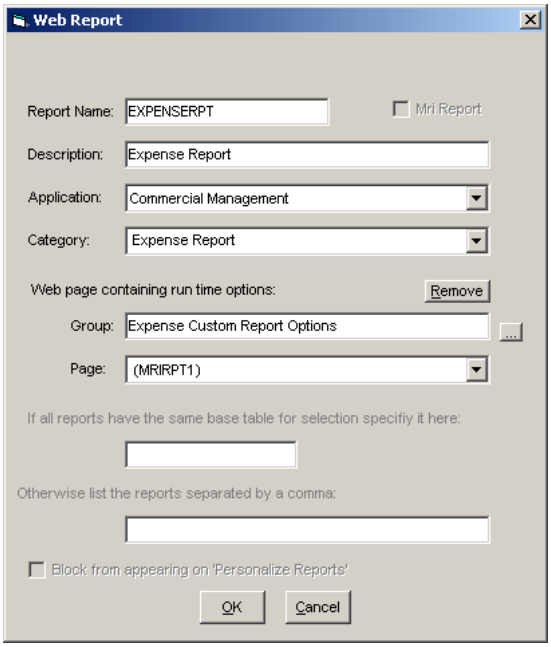


4. Right-click the report to display the shortcut menu, and click **Edit**.



5. Select the activity group that has the custom web report option, and click **OK**.



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Lesson 3: Web Enabling a Report

Purpose

The purpose of this lesson is to teach you how to complete the necessary steps to Web-enable a report.

Objectives

After completing this lesson, you will be able to Web-enable a report
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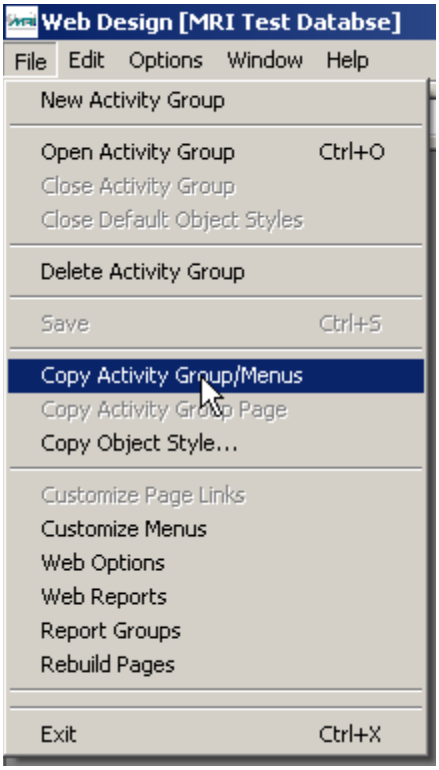
Web-enabling a Report

Procedure

Complete the following steps to Web-enable a report:

> **Note:** To make a report into a Web report, you must first copy the existing MRI view and then Web-enable the view.

1. In Web Design, select **File > Copy Activity Group/Menus**.



The **Copy Activity Groups** view appears.

2. Select the **ViewDesign Views** option at the top of the dialog box.
3. Select the view that you need from the list.
4. Rename the view in the **Description** field.
5. Assign it to the application and report section to which the report belongs by doing the following:
   a. Select the appropriate application from the **Application** field.
   b. Select appropriate report category from the **Category** field.
6. Click **Copy**.

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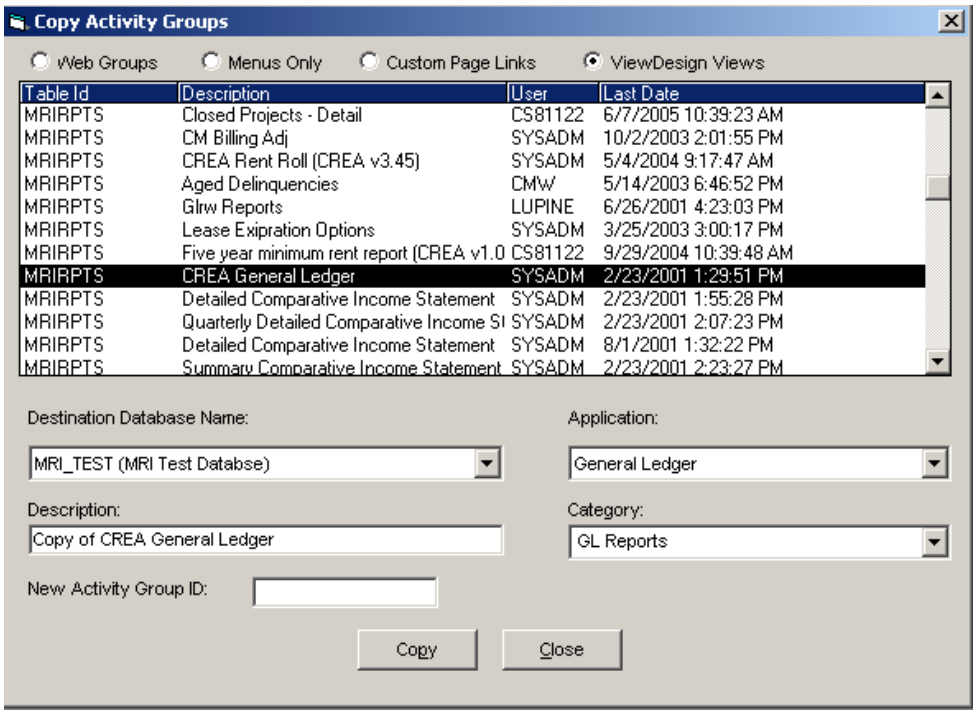
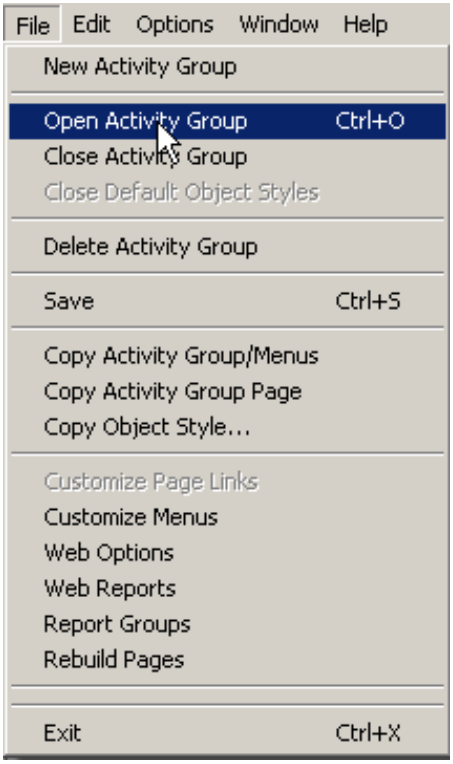


7. Select **File > Open Activity Group** to open the copied activity group.



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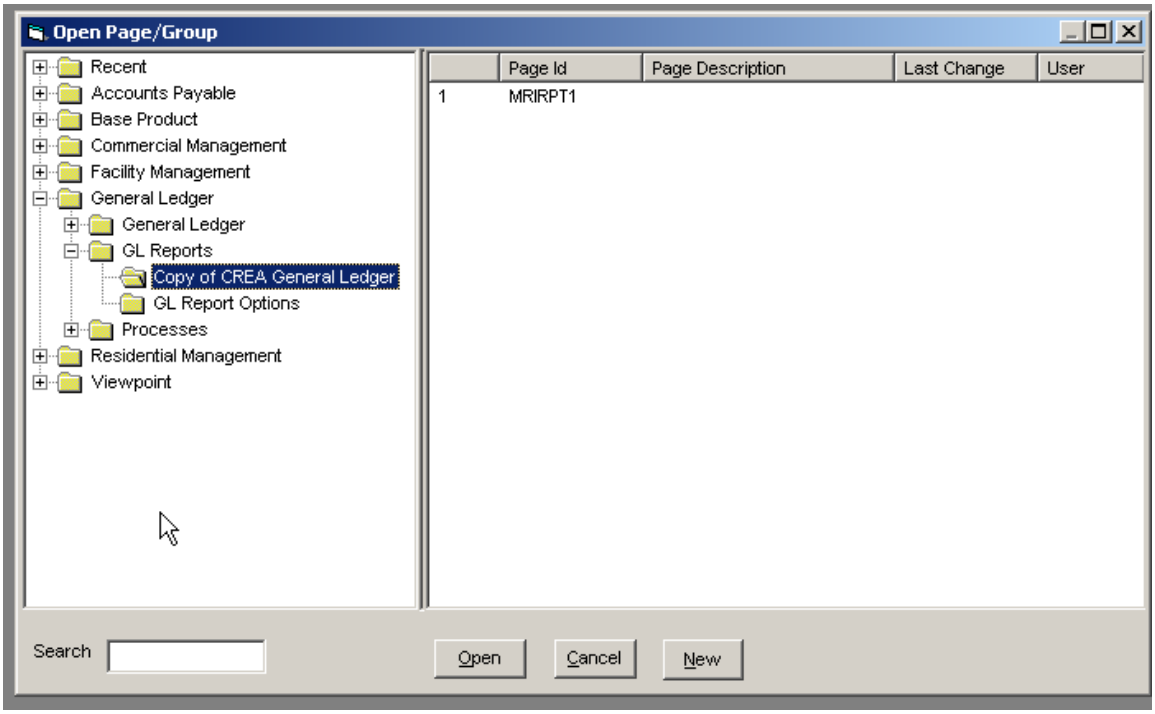
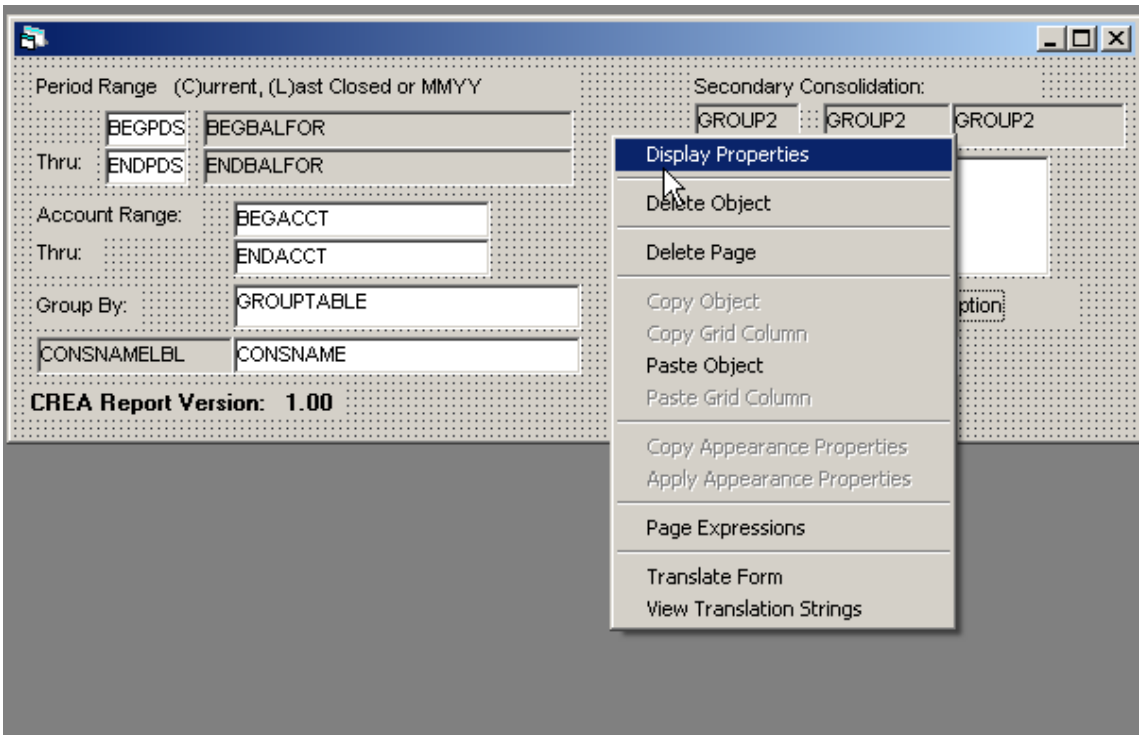
The **Open Page/Group** view appears.



8. Navigate through the folder tree to the page that you need, select the page, and click **Open**.

The page opens.

9. Right-click on the page, and select **Display Properties**



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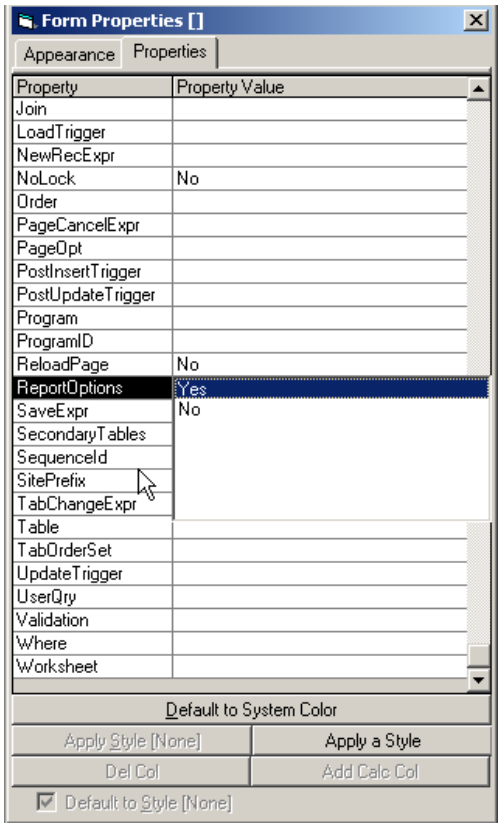
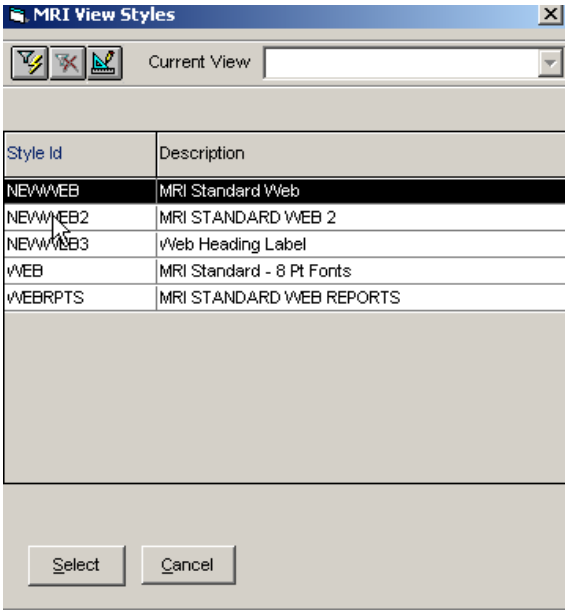
The **Form Properties** list appears.

10. Verify that the **ReportOptions** property value is set to "Yes."



11. Click **Apply a Style** to format the style of the report options as a Web report

12. Select the WEBRPTS Style ID for the background and the text boxes, click **Select**.



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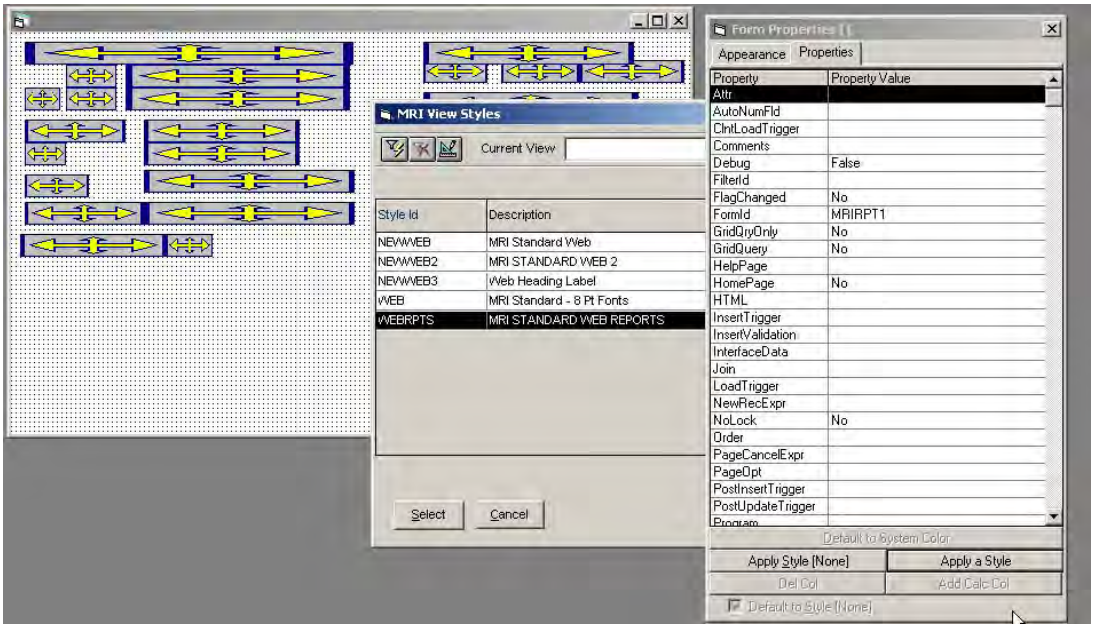
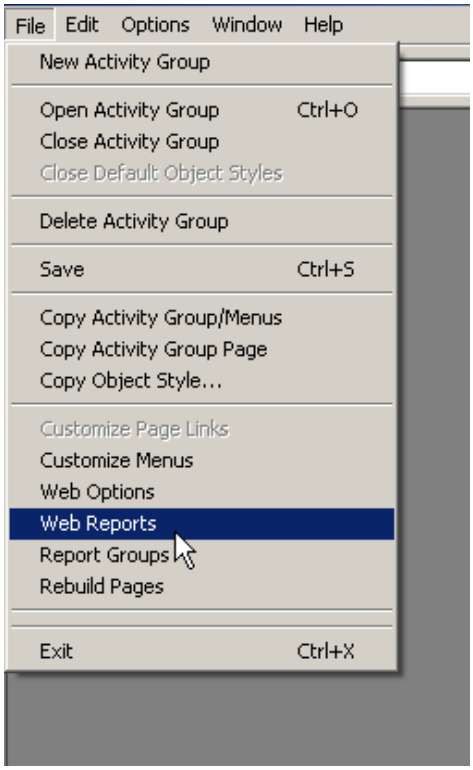
The WEBRPTS style is applied to the background and text boxes.



13. Once the report options are all set up, select **File > Web Reports** to Web-enable the report you want.



The Web Reports view appears.

14. Right-click on the report you want to Web-enable, and select **Edit** to link the report to the new report view that you created

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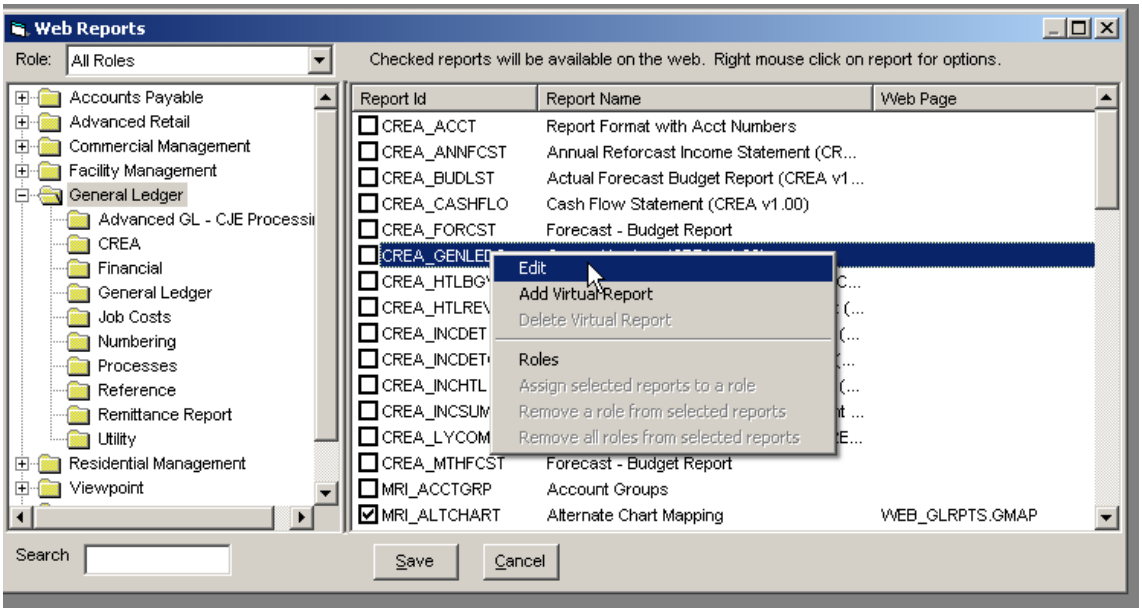
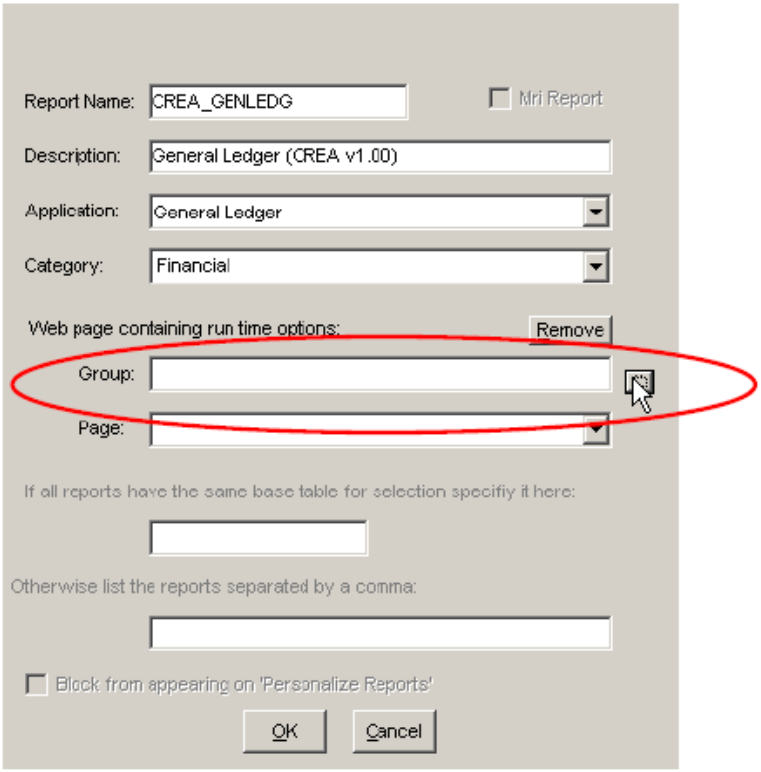


The **Edit** window appears.

15. Click the button with the three periods in it next to the **Group** field



The **Select Activity Group** view appears.

16. Select the Web page you wish to attach as runtime options, and click **Select**.

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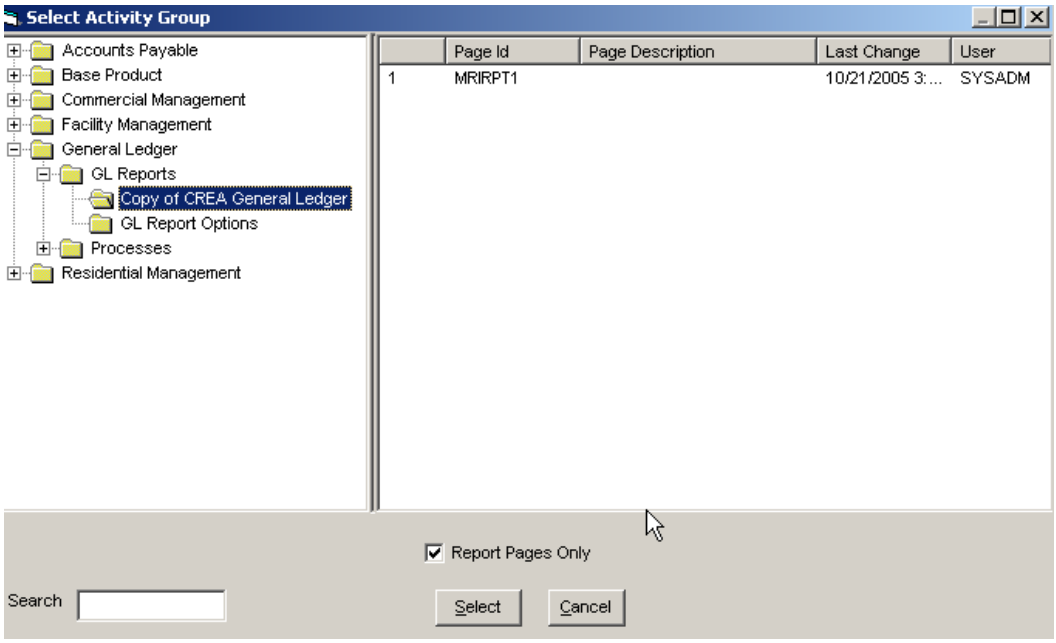
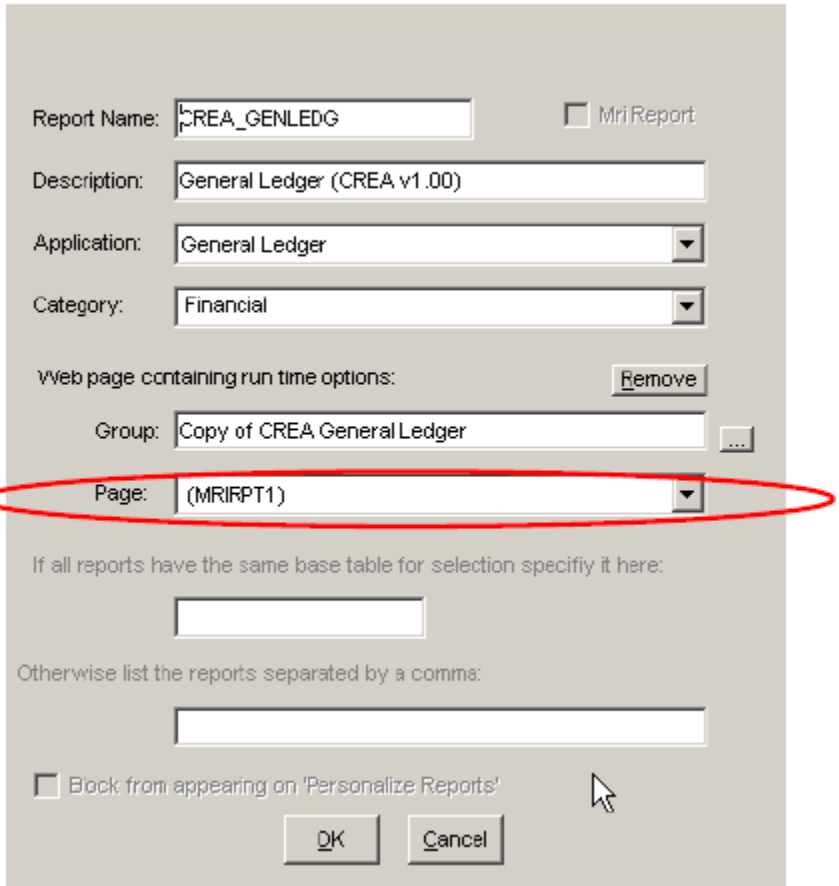


17. In the **Page** field, select the page in the group to use, and click **OK**.



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