

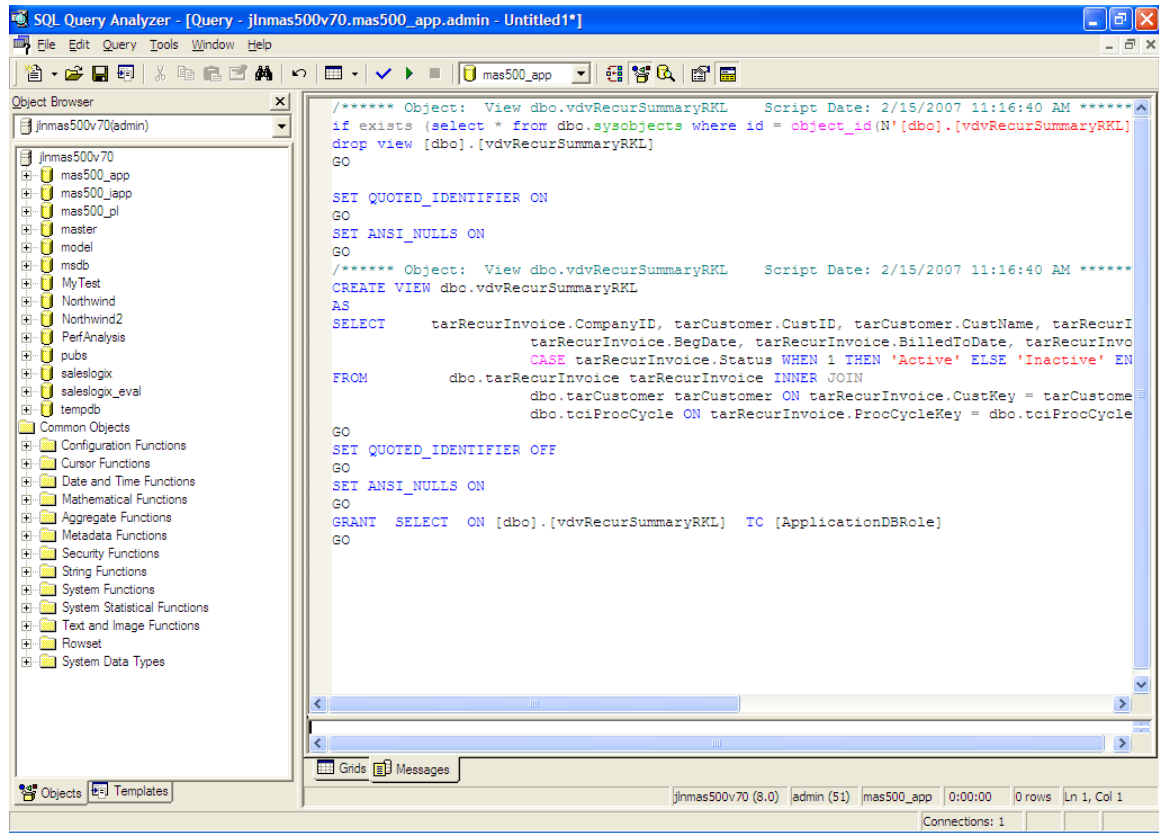
Adding Custom Views to MAS 500 Business Insights Analyzer

One of the most exciting new features in the MAS 500 6.3 release is Business Insights Analyzer (BIA). BIA allows users to organize, summarize, and chart specific business metrics based on their personal preference for a variety of analytical views included with the product. The 6.3 release included views for Budgets, Sales History, Purchase History, Project Profitability and Production. In addition, the September, 2004 monthly update includes seven additional views. *(See new BIA views document on partner file center for more information)* Each of the packaged views contain a superset of data a user may require. For example: The Project Profitability view contains the project header, estimate and forecast information in addition to the user defined fields. This gives the end user the added reporting flexibility they need to make appropriate business decisions beyond the core information being maintained. Behind the scenes, each of these views is constructed as a SQL Server view stored in the MAS 500 *_app database. The view contains all of the required tables and associated joins that a customer may find daunting when trying to construct one on their own.

As a value added reseller, you can construct additional views that a customer may require in their business. An invoice summary, timesheet detail or employee commission's view could be added through your services. With this technology at your arsenal, both your prospects and customers will appreciate the true "value-add" you bring to their business at a cost point they can appreciate. The following steps outline the procedures required when creating new Business Insights Analyzer view.

1: Using Microsoft Access, Query Analyzer or Enterprise Manager, construct a SQL Server view that contains all of the relevant tables, views and calculated fields the customer requires. The view must reside within the *_app database. The view name must start with the characters "vdv". Each view must also contain a column named "CompanyID". This CompanyID column represents the MAS 500 company code associated with the given transaction or entity. It is recommended that the CompanyID returned is from the primary table within the view definition.

Query Analyzer



Enterprise Manager – View Builder

The screenshot shows the SQL Server Enterprise Manager interface. The left pane displays the database hierarchy, including the 'mas500_app' database. The right pane shows a list of views, including 'MSP_ASSIGNMENTS', 'MSP_ATTRIBUTE_STRINGS', 'MSP_AVAILABILITY', and 'MSP_CALENDAR_DATA'. The main pane displays the 'New View in 'mas500_app' on 'JLNMA500V70'' dialog box, which includes a diagram of the view's structure and a list of columns.

Views 635 Items

Name	Owner	Type	Create Date
MSP_ASSIGNMENTS	dbo	User	1/19/2007 5:21:03
MSP_ATTRIBUTE_STRINGS	dbo	User	1/19/2007 5:21:03
MSP_AVAILABILITY	dbo	User	1/19/2007 5:21:03
MSP_CALENDAR_DATA	dbo	User	1/19/2007 5:21:03

New View in 'mas500_app' on 'JLNMA500V70'

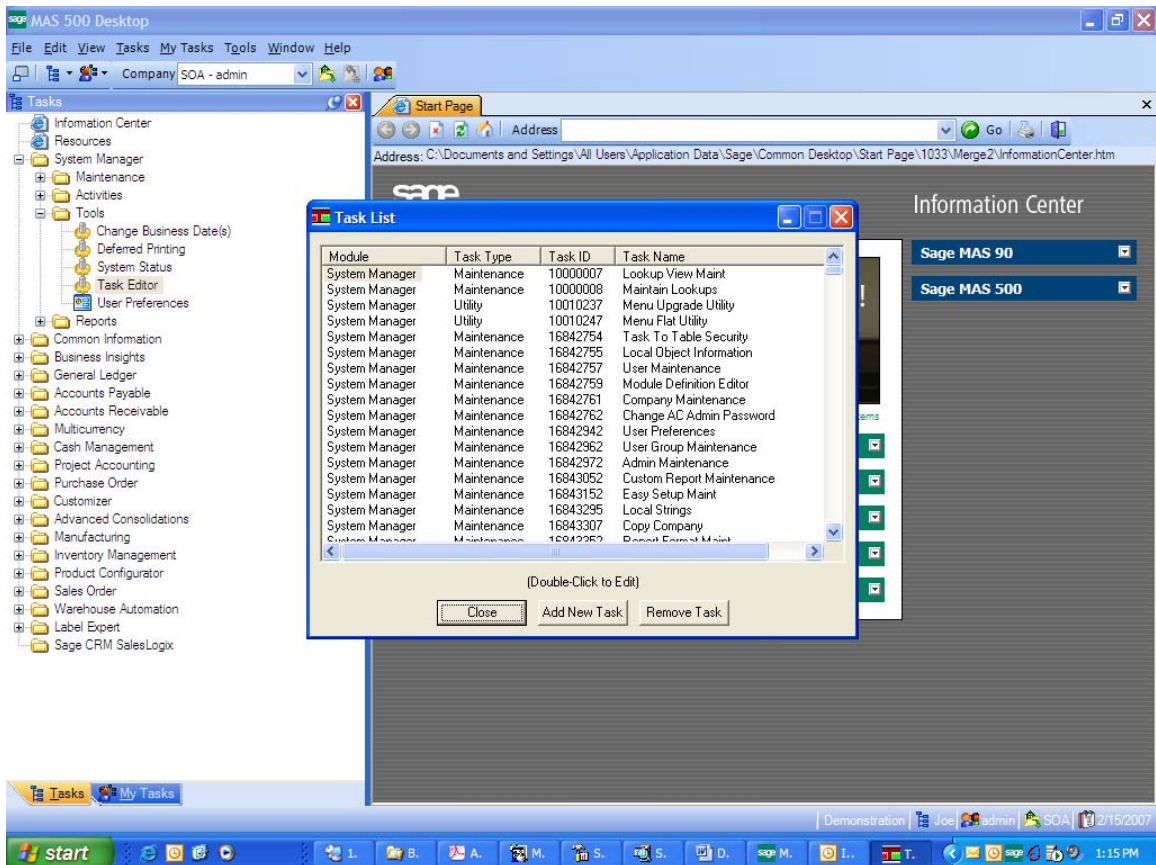
Diagram showing tables: tarRecurInvoice, tarCustomer, and tciProcCycle. Relationships are indicated by lines connecting the tables.


Column	Alias	Table	Output	Sort Type	Sort Order	Criteria	Or...	Or...	Or...
CompanyID		tarRecurInv	✓						
CustID		tarCustome	✓						
CustName		tarCustome	✓						

SQL Query:

```
SELECT tarRecurInvoice.CompanyID, tarCustomer.CustID, tarCustomer.CustName, tarRecurInvoice.RecurInvID, tarRecurInvoice.StopDate, tarRecurInvoice.BegDate, tarRecurInvoice.BilledToDate, tarRecurInvoice.TotalAmtToBill, tarRecurInvoice.NoInvcPosted, tarRecurInvoice.NoInvcToGen, CASE tarRecurInvoice.Status WHEN 1 THEN 'Active' ELSE 'Inactive' END AS Status, dbo.tciProcCycle.ProcCycleID FROM dbo.tarRecurInvoice tarRecurInvoice INNER JOIN dbo.tarCustomer tarCustomer ON tarRecurInvoice.CustKey = tarCustomer.CustKey INNER JOIN dbo.tciProcCycle ON tarRecurInvoice.ProcCycleKey = dbo.tciProcCycle.ProcCycleKey
```

2: Create a new MAS 500 BIA Task that references the view created above. This is performed using the Task Editor in MAS 500. Click on Add New Task in the Task List form.



 Task Editor

Launch Type.NET Standard

ModuleBusiness Insights - Explorer

SQL ViewvdyRecurSummaryRKL

Task TypeData Explorer

Task ID1010014001

ConstantkRecurSummaryRKL1010014001

NameRecur Invoice Summary RKL

DescriptionRecur Invoice Summary RKL

Default PermissionNormal

Object ProgIDAccounting.Application.BE.Explorer.exe

☐ System Task

☐ Create Only One Copy of the Object (Object is Shared)

Task Flags

Set Standard Flags

☐ Manual Load UI (Default: Object Manager will load)

☐ Manual Display UI (Default: Object Manager will display)

☐ Self Shut Down (Default: Object Manager can shut down)

☐ Run Standalone (Default: Run as child)

☐ Always Visible (Default: Object Manager can hide)

☐ Don't Allow Run-Time Over Ride of Flags

Integer Parameter

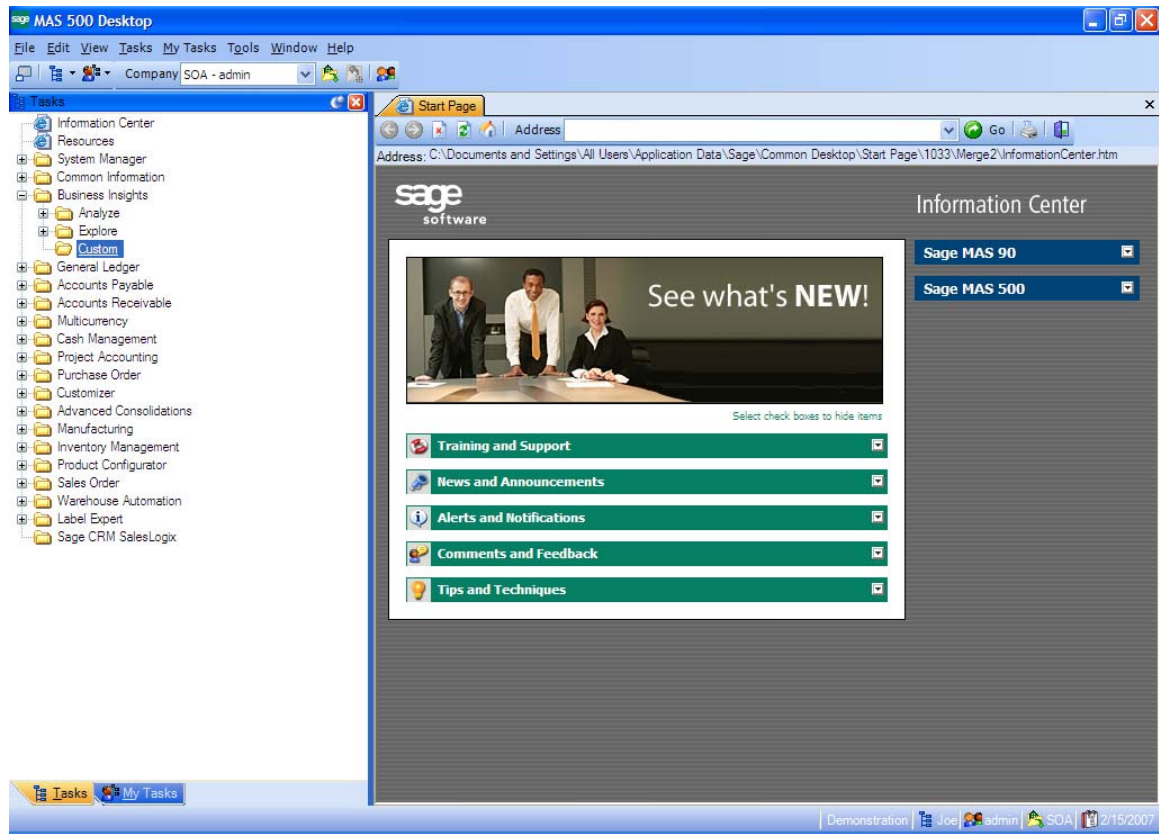
String ParameterAccounting.Application.BE.Explorer

☐ Web Enabled☒ Client Enabled

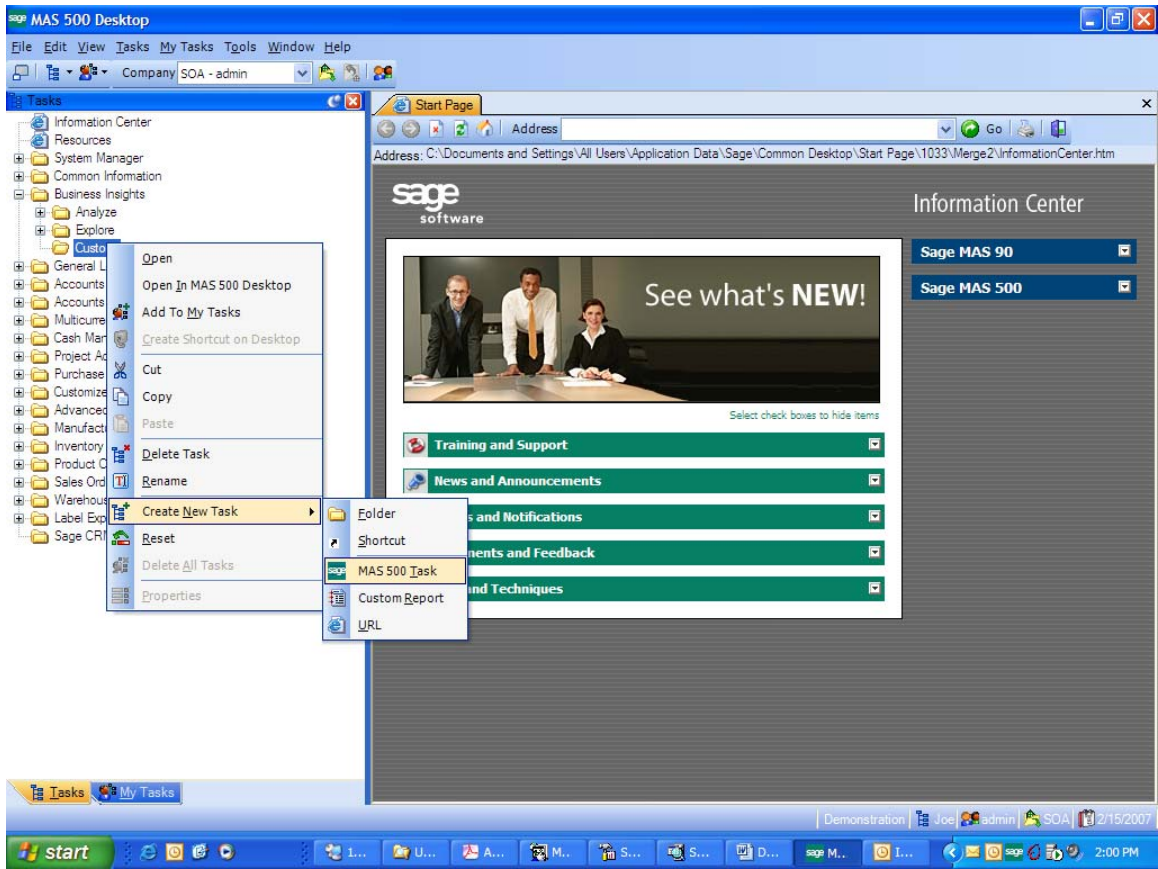
OK

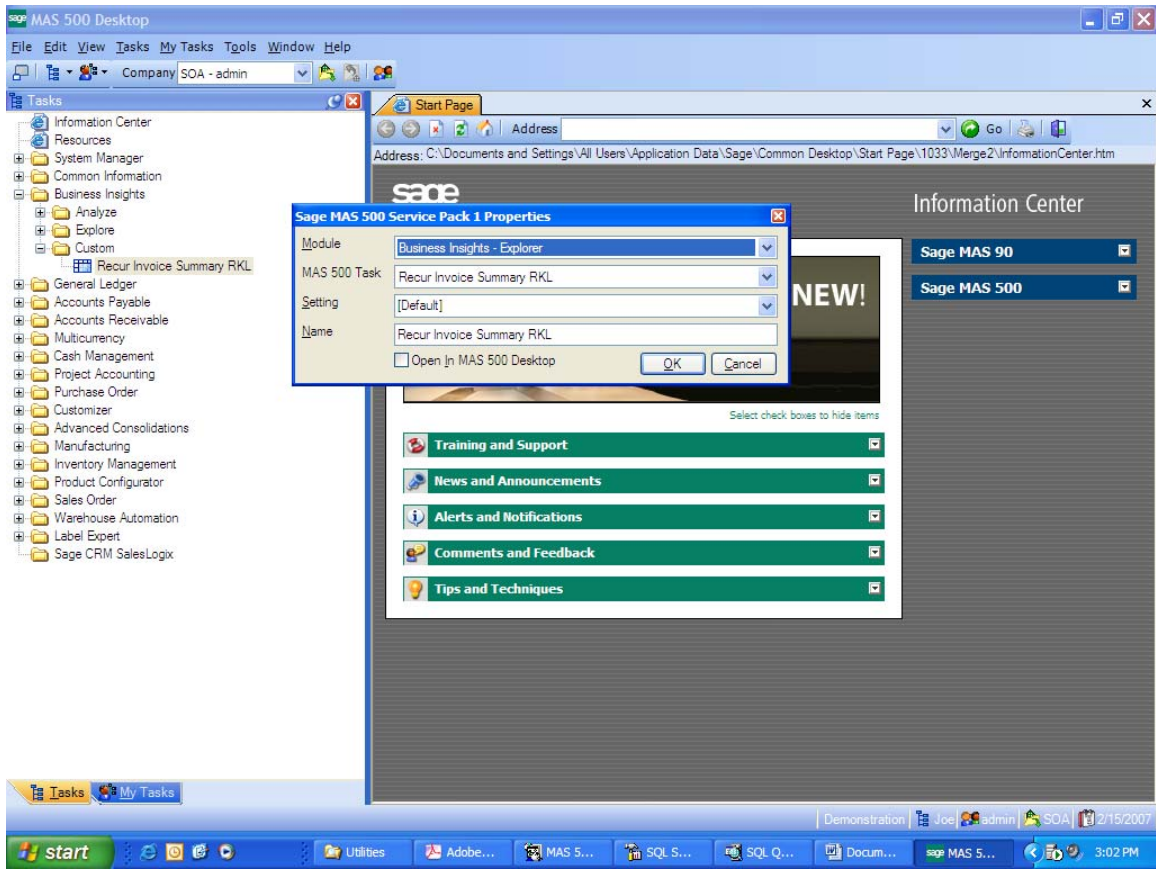
Cancel

3: Add the task to the MAS 500 Business Desktop and launch the task. Custom settings including pivot tables and charts can also be included as part of the overall solution to the customer.



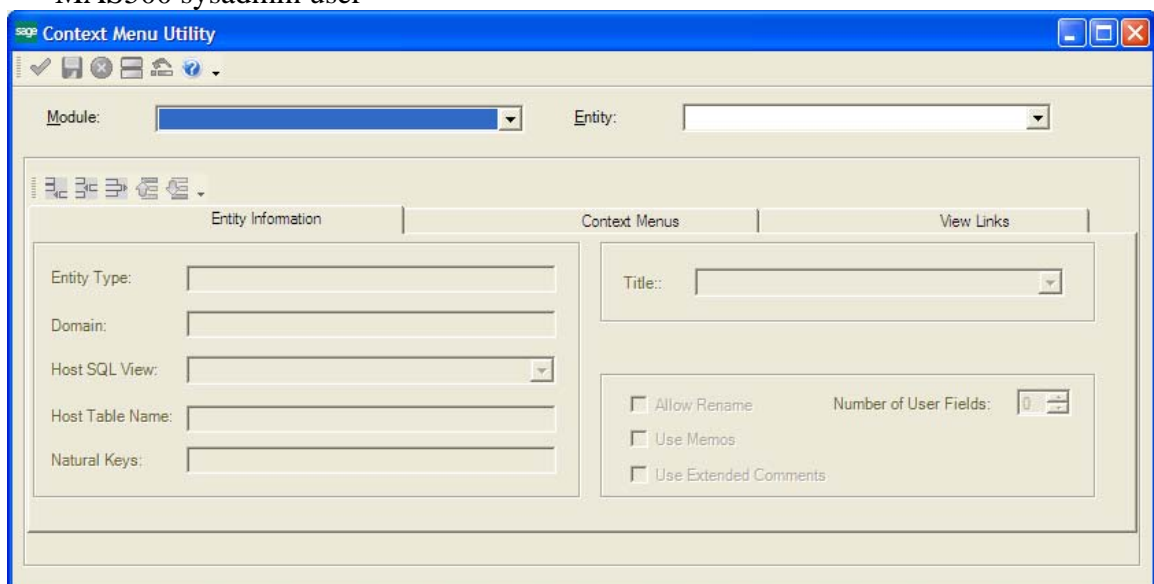
I like to create a folder called “Custom” to hold off of the non-MAS 500 BI views. Right-Click on the Custom folder and Create New Task – MAS 500 Task.





Context Menu Utility:

1. On a computer that has the MAS500 Client installed, navigate to C:\Program Files\Sage Software\Sage MAS 500 Client\Managed Applications
2. Launch the Accounting.Framework.ContextMenuUtility.exe and log in with a MAS500 sysadmin user



3. Choose the Module to modify, Accounts Receivable for example
4. Choose the Entity to modify, Customers for example

The screenshot shows the 'Context Menu Utility' window with the 'Module' set to 'Accounts Receivable' and the 'Entity' set to 'Customers'. The 'Entity Information' tab is active, displaying the following fields:

- Entity Type: 501
- Domain: Customer
- Host SQL View: vdvCustomer
- Host Table Name: JarCustomer
- Natural Keys: CustID

On the right side of the tab, there is a 'Title' dropdown set to 'Customers' and a section with checkboxes: 'Allow Rename' (checked), 'Use Memos' (unchecked), and 'Use Extended Comments' (unchecked). A 'Number of User Fields' spinner is set to 4.

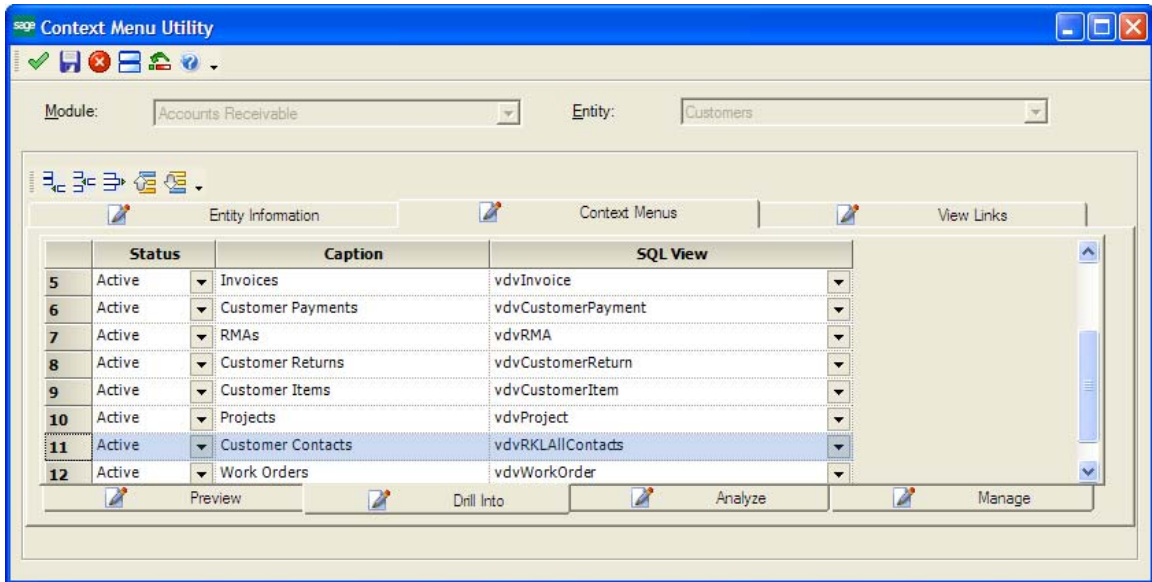
5. Now the Tabs are enabled to view the Entity Information, Context Menus and View Links
6. Click on the Context Menus tab and choose Preview, Drill-Into, Analyze, or Manage for the context menu you wish to Modify

The screenshot shows the 'Context Menu Utility' window with the 'Context Menus' tab active. The 'Insert Line' button is highlighted in the toolbar. Below the toolbar is a table with the following data:

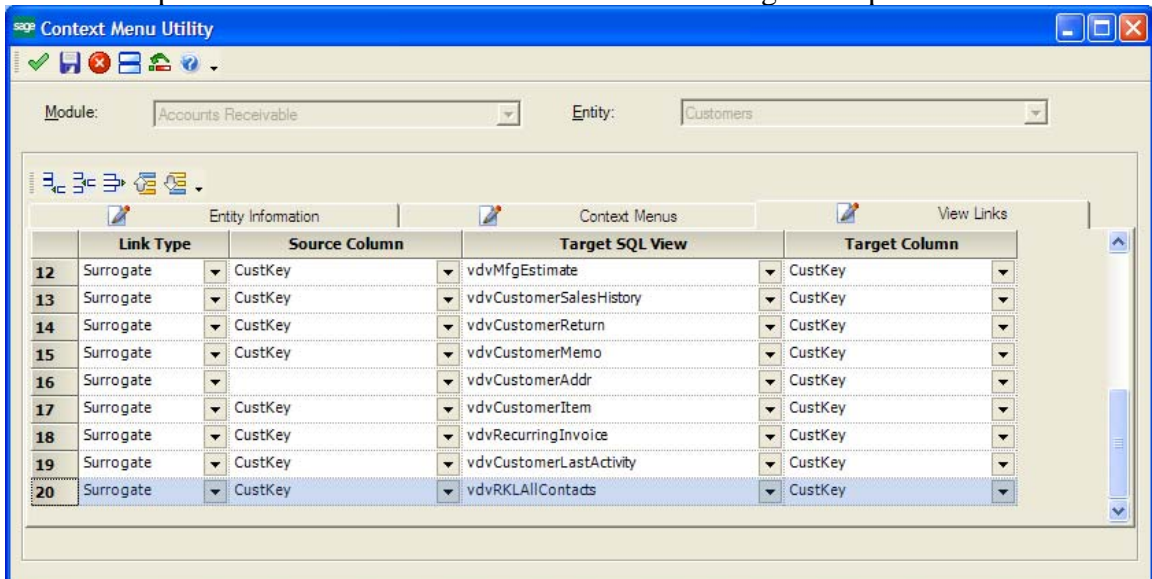
	Status	Caption	SQL View	Column
6	Active	Open Work Orders	vdvWorkOrder	Complete
7	Active	Recent Payments	vdvCustomerPayment	TranDate
8	Active	Unapplied Payments	vdvCustomerPayment	UnappliedAmt
9	Active	Addresses	vdvCustomerAddr	
10	Active	Active Memos	vdvCustomerMemo	EffectiveDate
11	Active	Last Activity	vdvCustomerLastActivity	

At the bottom of the window, there are four buttons: 'Preview', 'Drill Into', 'Analyze', and 'Manage'.

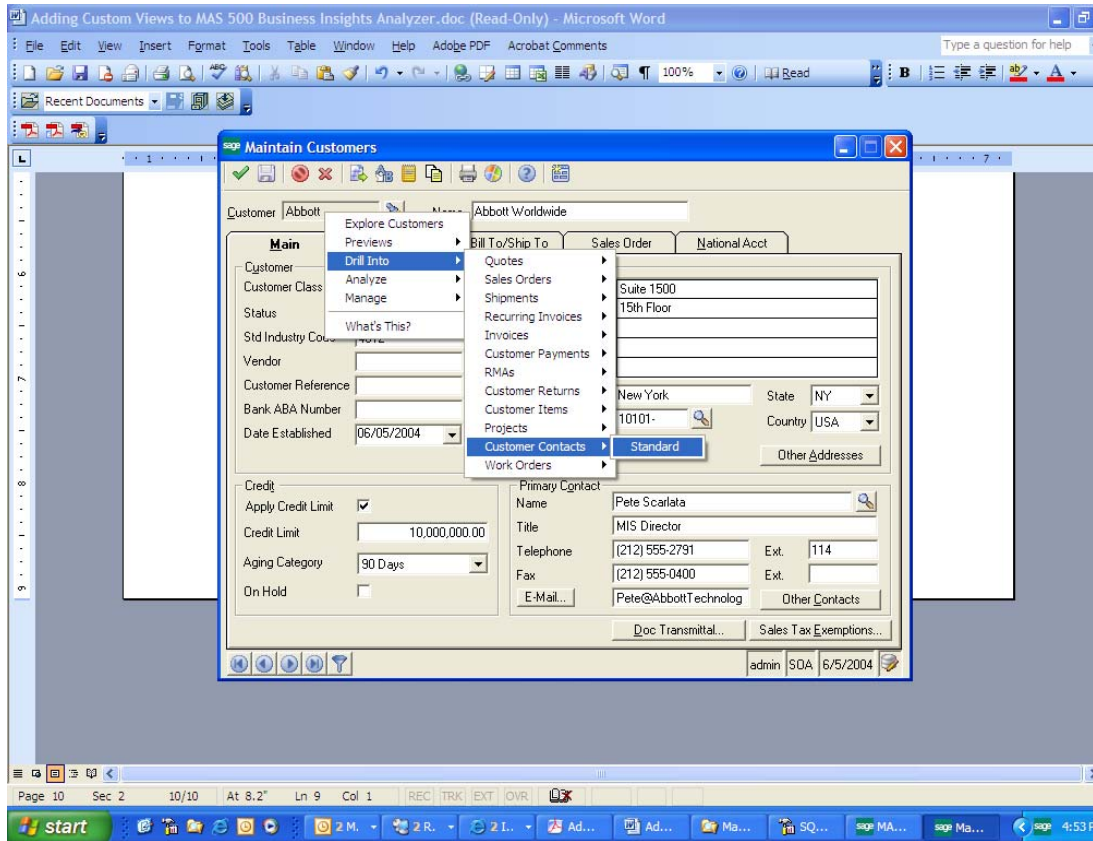
7. Click the toolbar button to insert a new line
8. Enter a Status of Active, the Caption you want to appear in the menu, the SQL View you created in the above steps



9. Next, click on the View Links tab to establish the data to pass to the explorer window when it is launched from the context menu. For example, when I launch the Customer Contacts View from Maintain Customers, I only want the contacts for the specific customer record I am on when launching the Explorer



10. Save the context menu by clicking the disk icon in the toolbar
 11. Log into MAS500 and run the new context menu



Important Notes

- The SQL View that was created needs to have the ApplicationDBRole permissions for Select for this work.
- When creating the Task in MAS 500 you will need to provide a unique Task ID. This must be input using the MAS 500 Ranges utility provided with the SDK.
- The process described above is similar for the Business Insights – Analyzer you just need to change the Module and Task Type when creating the Task.