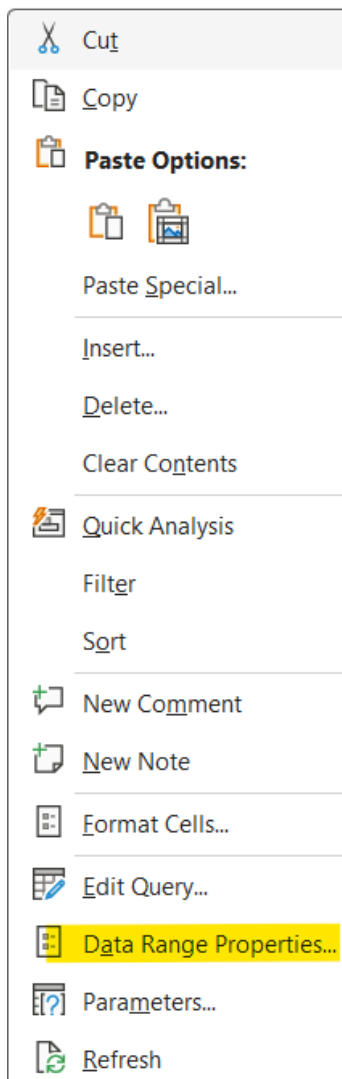


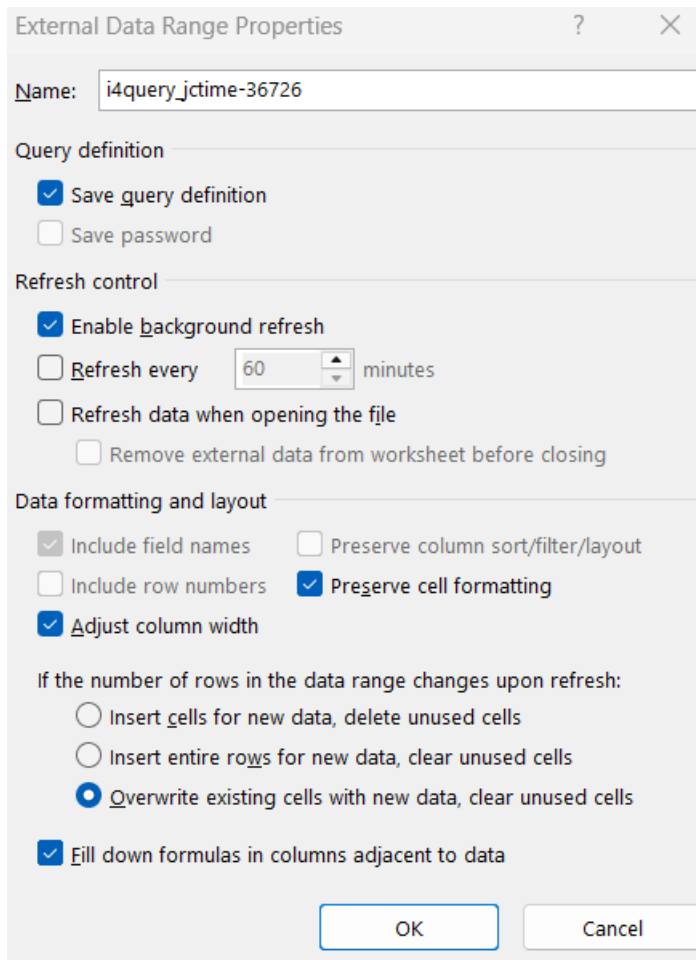
i4 Plugin Configuration Magic Short Cuts

There are 4 i4 Plugin Properties that have control/effect on how i4 plugins behave.

If you have already created i4 plugins and these properties are configured differently, there is no issue changing to the recommended properties below.

To review or change these properties right click on any active field on i4 query tab.

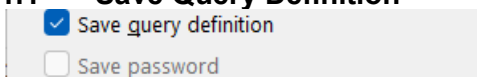




For those that are time poor that's it!!

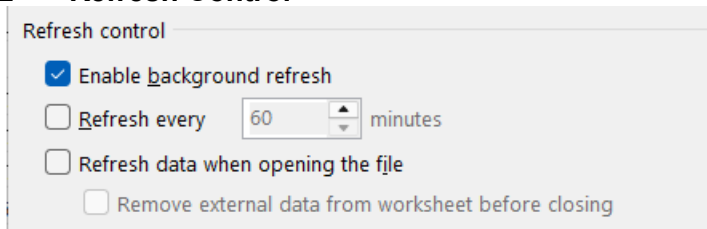
For the more inquisitive below is an explanation of each of the above

1.1 Save Query Definition



Must be ticked. This stores the i4 query within plugin so can be used again when refreshed

1.2 Refresh Control



This is a trap for new players. Excel typically defaults enable background refresh unticked.

In this mode; when refresh data is selected; Excel:

- immediately refreshes pivot tables to the present data (i.e. has not yet been refreshed) and then refreshes data which may take couple of seconds to couple of minutes depending on volume of data refreshed.

Then data is out of sync to pivot tables as pivot tables created at beginning of the process before data refreshed (yes – not smart).

Then you repeat a second time and it magically works (as data present was just refreshed).

So if you believe you need to refresh plugin twice to get pivot tables ‘automatically updated’) then tick

Refresh every minutes

This allows an i4 plugin to be refreshed every xx minutes. We have never had the need to use this. If you are considering using this suggest you discuss with Infoware services support as with many users using this behaviour may place unnecessary overhead on server.

Refresh data when opening the file

This can be a useful tool for users who are ‘view data only’ and need access to current data. Examples may be list of debtors on stop credit; list of current employees or other data. At a new installation there were 25 users – 20 who needed read only access of the current stock levels for various purposes -the other 5 being manufacturing/production, accounts and finance. An i4 plugin was created (for a single i4 user) which listed all products SOH qtys by product groups. With Refresh Data when opening this file ticked; they all opened the same plugin and plugin shows the current stock qtys. Job done! Plus if they wished to reflect current figures hit the F5 / Refresh All button. Comment at end of day 1 ‘this system just like excel except shows correct qtys all the time’! No 20 users to train or create – result achieved for all.

1.3 Preserve Cell Formatting on Refresh

Excel will sometimes interpret dates as numbers; or you apply currency formats to numbers. Frustrating to apply various cell formatting changes; then lose next time your refresh – unless you have this parameter set.

Adjust column width

It was similarly frustrating to change the width of various columns in pivot table; refresh then the column widths would reset – and you had to repeat reformatting columns all again. Tick this parameter and only now have to do once!

If the number of rows in the data range changes upon refresh:

- Insert cells for new data, delete unused cells
- Insert entire rows for new data, clear unused cells
- Overwrite existing cells with new data, clear unused cells

1.4 Fill Down Formulas in Adjacent Columns

When the i4 plugin occurs the number of rows can grow and shrink depending on the volume of data queried e.g. list all transactions for a month. Early in month relatively less transactions; end of month grows; next month less again

Simple advice: always select the override existing cells with new data; clear unused cells.

Otherwise #ref! and other unexpected errors may appear in formula calculated fields.

Fill down formulas in columns adjacent to data

If you use excel formulas to define your own virtual fields (a commonly applied technique) then you 'expect' the formulas to be applied to all rows of data uploaded in i4 plugin. This parameter must be selected – otherwise Excel will only apply formulas to the number of rows as refreshed. E.g. i4q uploads 2,000 transactions. You have created new formulas/ as per your needs. Next time you refresh the plugin a couple of days later and there are now 2,400 records. Without this box ticked then the formulas will only be calculated for the 2,000 rows – not the 2,400 rows you expect.

Enjoy your i4 plugin creation and adding value to your team.

--END OF DOCUMENT--