

The next generation CONTROL®

version 10.5

CONTROL® Web



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Overview

This document describes CONTROL® Web, the interface used to access information with a modern web browser, such as Edge, Chrome, or Safari, from a PC, phone, or tablet.

The primary focus of CONTROL® Web is to make current financial information instantly available to executives, managers, and analysts from anywhere, at any time, without having to extract, publish, or e-mail the information. Moreover, it is a self-service interface, so they can select, pivot, drill, and see transactional data to answer their own questions.

In addition, users who are not comfortable or familiar with Excel can use the web interface to input their budget or forecast data.

All this functionality is available with virtually no effort or cost because the securitized *views* in your CONTROL® application are likewise securely available over the web.

Features

CONTROL® Web delivers a significant subset of the Information Navigator capabilities with a simple, intuitive interface.

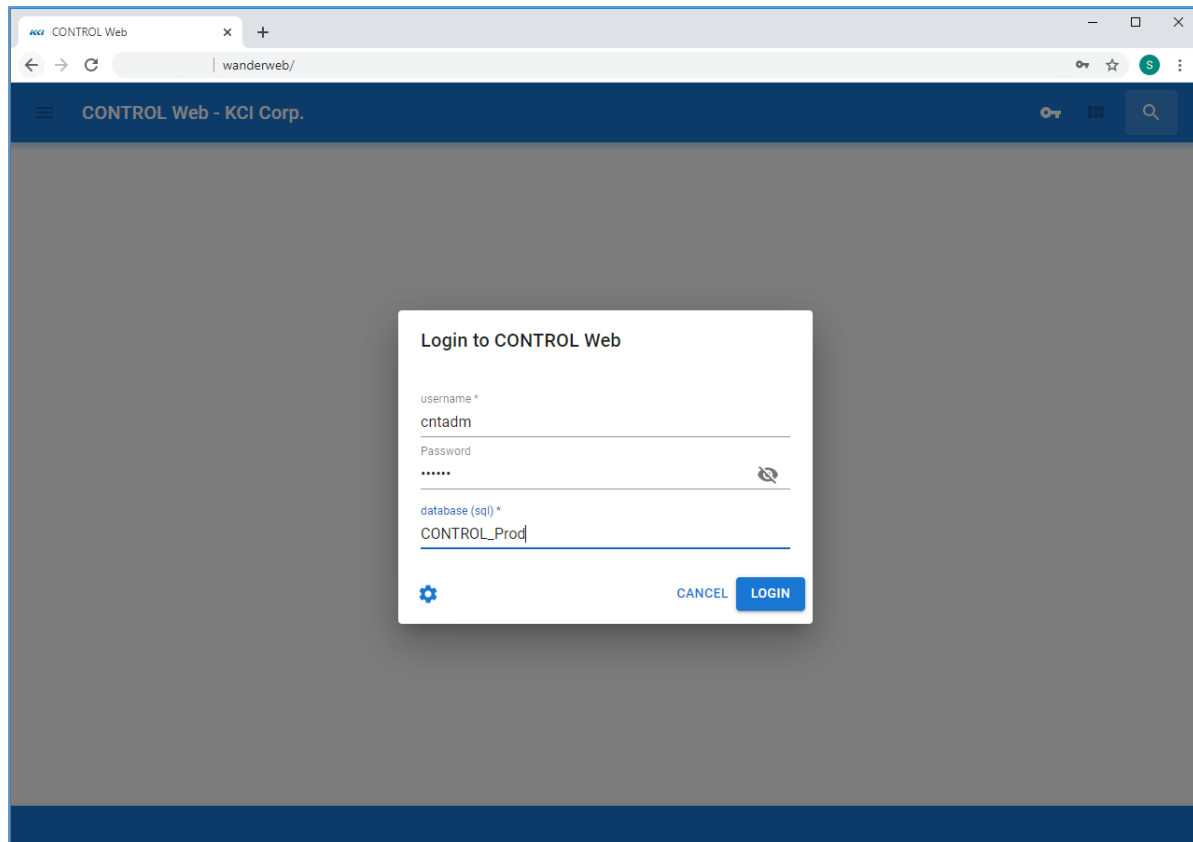
You can:

- Open and navigate any *view*, except a *flex view*
- Perform drill operations, including drill-to-source
- Update data and see the impact of your changes, and file to the database
- Enter row comments
- Save a personal *view* presentation (user scope)
- Save a *view* as a new *view*
- Run predefined *scripts*
- Print or export to Excel

A new user should be able to access data and perform basic analysis with virtually no training.

Logging in

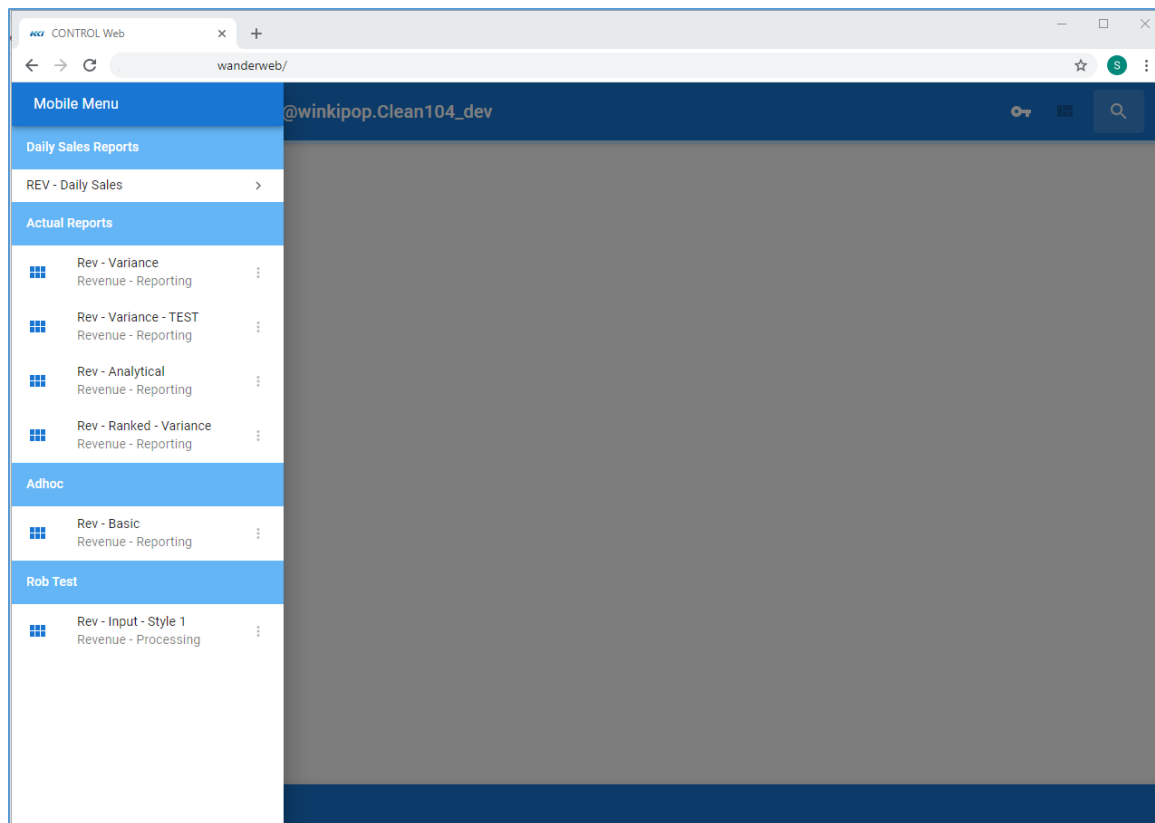
To connect to CONTROL® Web, simply open your browser and navigate to your company's designated URL. You will see the familiar login dialog:



When you login, the server generates a unique and secure token that the browser remembers and uses to access all site functionality.

Note: Cookies are not used.

When your log in is successful, a sliding drawer containing your *menu* appears on the left-hand side of the window.

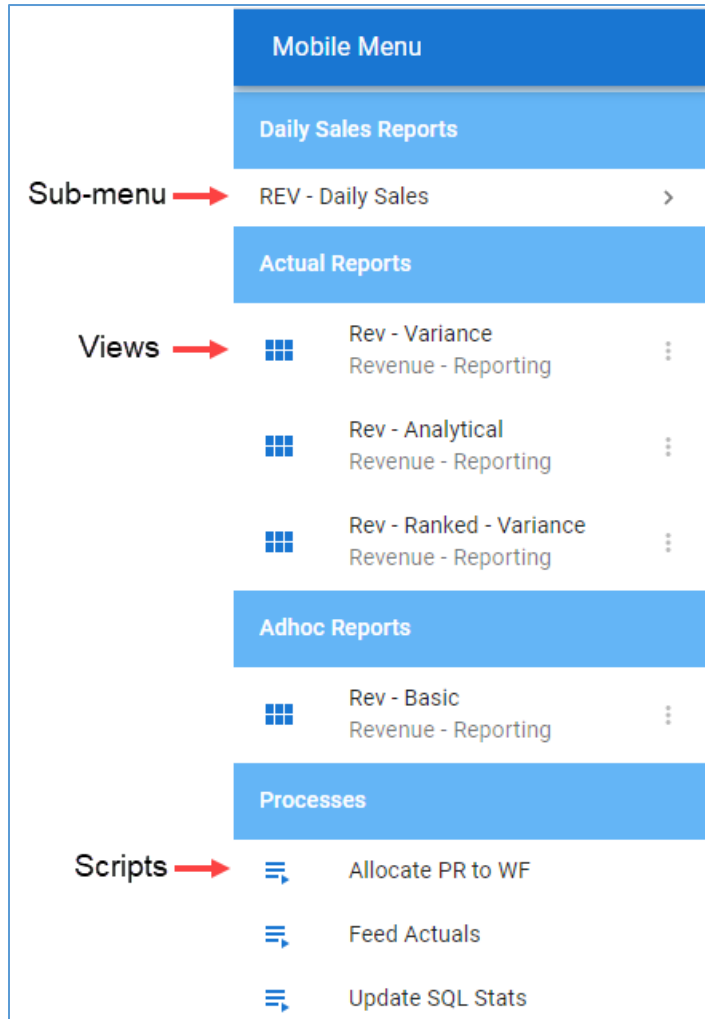


A few words about security:

- Your User ID and password are the same whether you are using CONTROL® via its Excel interface or the web
- The data you can see and change is governed by the privileges assigned to your ID – you don't have access to anything new
- All the data, meta-data, business rules, etc. are in the database you have connected to, so no matter what interface is used, everyone is seeing the same data
- Your company can choose to run CONTROL® Web on your intranet and close it off from external access, expose it to the internet, or run it on the cloud with the necessary network configuration steps.

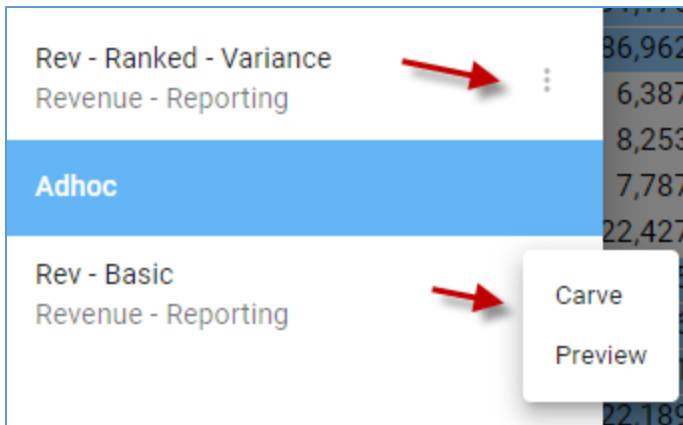
The menu

The *menu* contains *views*, *books*, *scripts*, or *sub-menus*, and can be many levels deep, as appropriate for your CONTROL® applications.



You can:

- Access a *sub-menu* by clicking on the > next to the *sub-menu* name.
- Access pages in a *book* by clicking on the > next to the *book's* name, similar to a *sub-menu*
- Run a *script* by clicking on the *script* name.
- Open a *view* by clicking on the *view* name.
- Choose to preview the *view* without generating all the data by clicking on the three vertical dots:












General features

When a view is open, you can use the icons at the top of the page to access various functions:


Rev - Variance									
EXMP - Adjustment									
ALL									
Variance Revenue Account									
Budget Aug-2019 Sales Discount									
Customer	Product								Comments
	+Product Line 0001	+Product Line 0004	-Product Group 0001	+Product Line 0002	-Product Group 0002	+Product Line 0003	-Product Group 0003	-Total Product	
+JPN Japan	4,407,617	618,315	5,025,932	2,824,498	2,824,498	1,440,746	1,440,746	9,291,176	
+THA Thailand	1,123,308	177,473	1,300,781	724,680	724,680	370,836	370,836	2,396,296	
+TWN Taiwan	1,148,263	191,175	1,339,437	743,153	743,153	380,866	380,866	2,463,456	
-Asia	6,679,188	986,962	7,666,150	4,292,330	4,292,330	2,192,447	2,192,447	14,150,927	
+ESP Spain	42,793	6,387	49,180	27,516	27,516	14,059	14,059	90,755	
+FRA France	45,141	8,253	53,394	29,395	29,395	15,108	15,108	97,897	
+ITA Italy	44,554	7,787	52,341	28,925	28,925	14,846	14,846	96,112	
-Europe	132,489	22,427	154,916	85,836	85,836	44,013	44,013	284,764	
+CAN Canada	11,192	2,105	13,297	7,302	7,302	3,757	3,757	24,355	
+USA United States	90,195	10,696	100,891	55,290	55,290	28,114	28,114	184,295	
-North America	101,386	12,801	114,187	62,592	62,592	31,871	31,871	208,650	
-Total Customer	6,913,063	1,022,189	7,935,253	4,440,759	4,440,759	2,268,331	2,268,331	14,644,342	

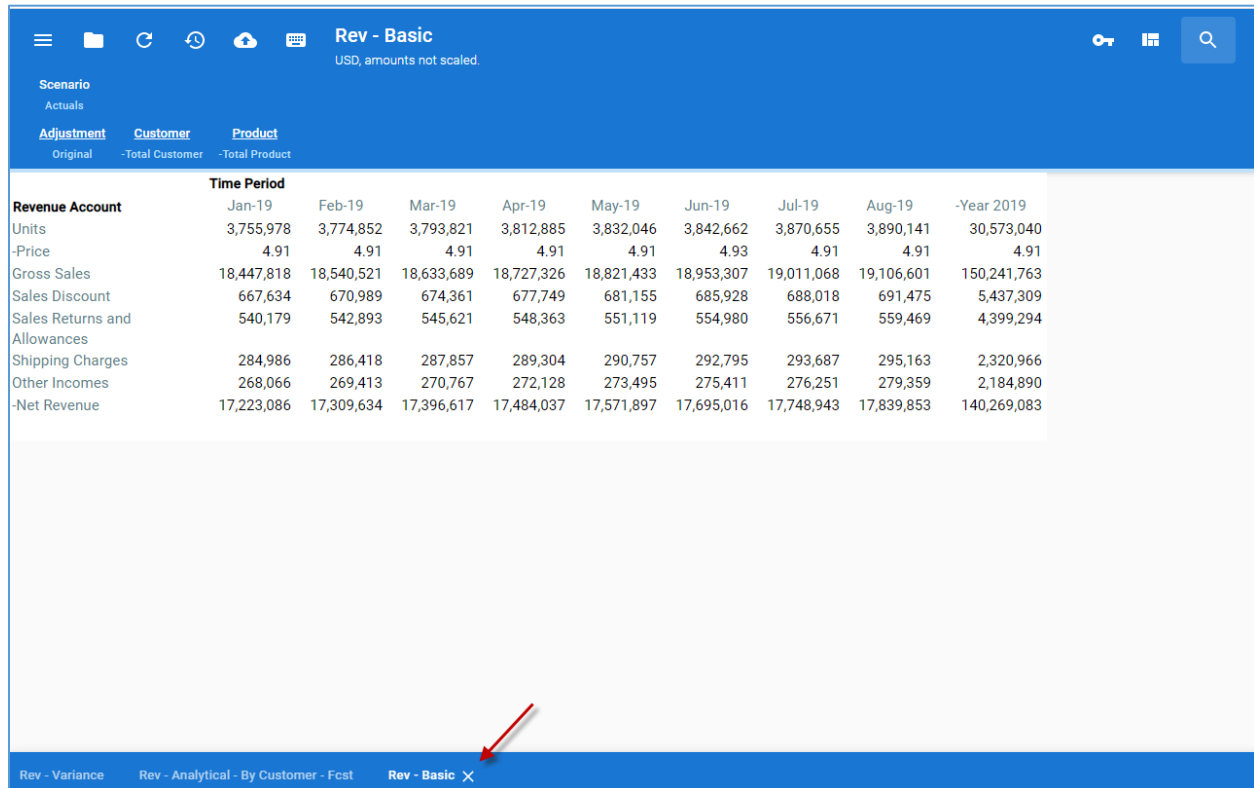
The table below summarizes the functions:

Button	Function Name	Description
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	Menu	Makes the <i>menu</i> drawer visible
	File Menu	Various sub options: <ul style="list-style-type: none">• Change formatting theme• Turn zero suppression on/off for rows/columns• Turn repeat nested member names on/off• Export current page to Excel• Print current page• Close the <i>view</i>• Save your <i>view's</i> presentation• Save the <i>view</i> as a new <i>view</i>
	Refresh/Recalculate	For updateable <i>views</i> , re-compute calculated variables and consolidated organization members based on your updates
	Regenerate	Discard any updates and re-query data from the database
	File Data	Save any changes you have made to the data or commentary to the database
	Solve	For updateable <i>views</i> where changes have been made to calculated data, back calculate the required changes to elemental data
	User Info	Various options: <ul style="list-style-type: none">• Logout• Details about your connection• Access to various session wide settings
	View Operations	Opens a drawer on the right side of the window, so you can move the <i>view's dimensions</i> between the row, column, page, and filter edges
	Search	Finds and highlights strings within the <i>view</i>



You can open as many *views* as you like. Each *view* displays on a different tab, and you can switch from *view* to *view*, by clicking its tab. You can close one or more *views* by clicking the  on the active *view's* tab:




Scenario: USD, amounts not scaled.

Actuals

Adjustment: Original | Customer: -Total Customer | Product: -Total Product

Revenue Account	Time Period								
	Jan-19	Feb-19	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	-Year 2019
Units	3,755,978	3,774,852	3,793,821	3,812,885	3,832,046	3,842,662	3,870,655	3,890,141	30,573,040
-Price	4.91	4.91	4.91	4.91	4.91	4.93	4.91	4.91	4.91
Gross Sales	18,447,818	18,540,521	18,633,689	18,727,326	18,821,433	18,953,307	19,011,068	19,106,601	150,241,763
Sales Discount	667,634	670,989	674,361	677,749	681,155	685,928	688,018	691,475	5,437,309
Sales Returns and Allowances	540,179	542,893	545,621	548,363	551,119	554,980	556,671	559,469	4,399,294
Shipping Charges	284,986	286,418	287,857	289,304	290,757	292,795	293,687	295,163	2,320,966
Other Incomes	268,066	269,413	270,767	272,128	273,495	275,411	276,251	279,359	2,184,890
-Net Revenue	17,223,086	17,309,634	17,396,617	17,484,037	17,571,897	17,695,016	17,748,943	17,839,853	140,269,083

Bottom navigation bar: Rev - Variance | Rev - Analytical - By Customer - Fcst | **Rev - Basic** 

View navigation

Views in CONTROL® Web are more than static presentations. You can select what data you want and how you want to see it to focus on items of interest, answer questions, or perform analyses.

Page selection

To pick a different page on a multi-page report, click on one of the highlighted dimension-branch names at the top of the *view*:

Rev - Variance						
NOTTRANSLATION, amounts not scaled.						
EXMP - Adjustment						
ALL						
Variance			Revenue Account			
Budget Aug-2019			Sales Discount			
Customer	Product					
	+Product Line 0001	+Product Line 0004	-Product Group 0001	+Product Line 0002	-Product Group 0002	+Product Line 0003
+JPN Japan	4,407,617	618,315	5,025,932	2,824,498	2,824,498	1,440,746

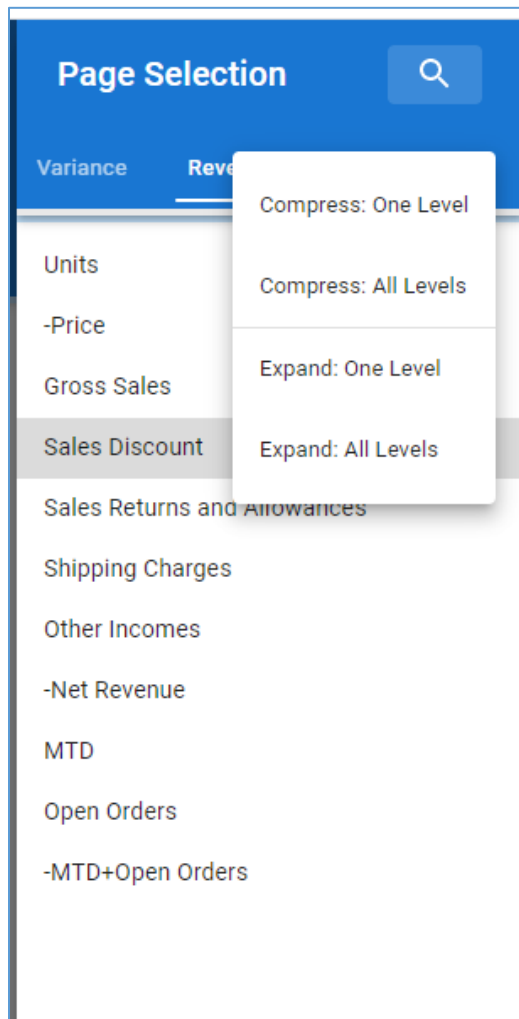
A page selection drawer will slide out on the right side of the screen, allowing you to select different members from any of the page edge branches.

Page Selection					
NOTTRANSLATION, amounts not scaled.					
Variance			Revenue Account		
Actual Aug-2019					
Budget Aug-2019 <input checked="" type="checkbox"/>					
-CY Actual vs CY Budget Var					
-CY Actual vs CY Budget %					
Actual YTD-Aug-2019					
Budget YTD-Aug-2019					
-CY Actual vs CY Budget YTD Var					
-CY Actual vs CY Budget YTD %					
Budget YR-2019					
CY Actual vs CY Budget Comments					

Product	-Product Group 0002	+Product Line 0003	-Product Group 0003	-Total Product	Comments
4,498	2,824,498	1,440,746	1,440,746	9,291,176	
4,680	724,680	370,836	370,836	2,396,296	
3,153	743,153	380,866	380,866	2,463,456	
2,330	4,292,330	2,192,447	2,192,447	14,150,927	
7,516	27,516	14,059	14,059	90,755	
9,395	29,395	15,108	15,108	97,897	
8,925	28,925	14,846	14,846	96,112	
5,836	85,836	44,013	44,013	284,764	
7,302	7,302	3,757	3,757	24,355	
5,290	55,290	28,114	28,114	184,295	
2,592	62,592	31,871	31,871	208,650	
0,759	4,440,759	2,268,331	2,268,331	14,644,342	

Simply select the desired member and click back on the *view* to see the new data. You can see the available members for each branch by clicking on the branch name, for example, **Variance** or **Revenue Account**.

For very large lists of members, it can be useful to expand or compress the branch by right clicking on the branch name or using the search to find the member you want.



Rotation (pivoting)

You can reconfigure your *view* by moving its dimension-branches to different edges. Click the

View Operations icon and the right-hand drawer will show the current edge assignments:



Dimensions, Branches and Filters

Dimension Type ▾

View Edge Assignments

Pages

- Variance Default Branch
CY Actual vs CY Budget
- Revenue Accts

Columns

- Total Product

Rows

- Total Customer

Filters

- Tot Adj

Click and drag the branches between the edges, then click back on the *view* to close the drawer and reconfigure the report. Below, we have interchanged the **Customer** and **Revenue Account** dimension-branches:



Rev - Variance
NOTTRANSLATION, amounts not scaled.

EXMP - Adjustment
ALL

Variance Product
Budget|Aug-2019 +Product Line 0002

Customer	Revenue Account	Units	-Price	Gross Sales	Sales Discount	Sales Returns and Allowances	Shipping Charges	Other Incomes	-Net Revenue	MTD	Open Orders	-MTD+Open Orders	Comments
+JPN Japan		120,628	585.37	70,612,448	2,824,498	1,765,311	1,053,057	1,193,464	66,163,046	0	0	0	
+THA Thailand		123,442	146.77	18,116,991	724,680	452,925	270,235	306,266	16,975,418	0	0	0	
+TWN Taiwan		124,849	148.81	18,578,819	743,153	464,470	277,149	314,102	17,408,149	0	0	0	
-Asia		368,918	290.87	107,308,259	4,292,330	2,682,706	1,600,441	1,813,833	100,546,614	0	0	0	
+ESP Spain		122,035	5.64	687,907	27,516	17,198	10,260	11,628	644,561	0	0	0	
+FRA France		127,663	5.76	734,867	29,395	18,372	10,964	12,426	688,563	0	0	0	
+ITA Italy		126,256	5.73	723,127	28,925	18,078	10,788	12,227	677,562	0	0	0	
-Europe		375,953	5.71	2,145,902	85,836	53,648	32,012	36,281	2,010,686	0	0	0	
+CAN Canada		42,867	4.26	182,550	7,302	4,564	2,724	3,087	171,047	0	0	0	
+USA United States		314,796	4.39	1,382,258	55,290	34,556	18,088	20,500	1,294,823	0	0	0	
-North America		357,663	4.38	1,564,807	62,592	39,120	20,812	23,587	1,465,870	0	0	0	
-Total Customer		1,102,534	100.69	111,018,968	4,440,759	2,775,474	1,653,265	1,873,700	104,023,170	0	0	0	

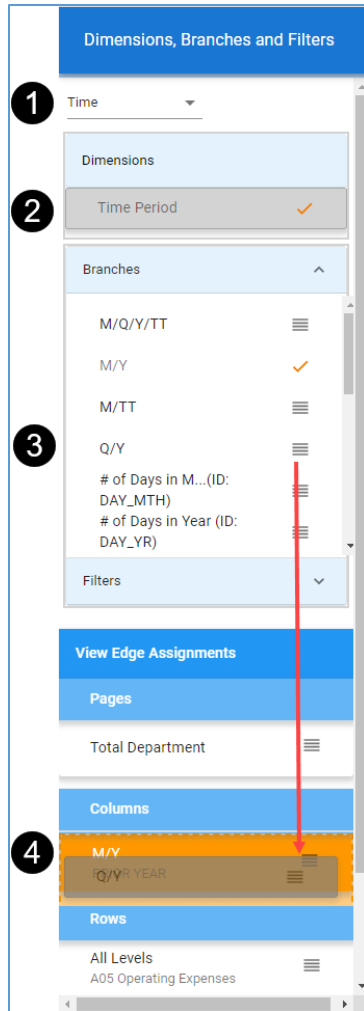
Note:

- You can nest branches on any edge and they will appear in the view in the same order as in the drawer.
- If you move one or more branches to or from the **Filter** edge, the data in the view will regenerate from the database.

Change filters and branches

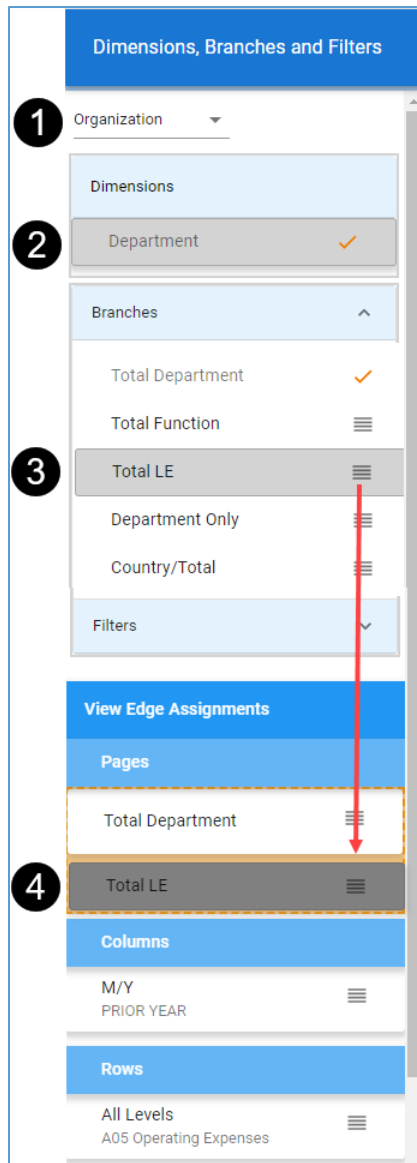
In the **View Operations** drawer, you can select predefined branches and *filters* for *dimensions*.

To change the definition of an existing *dimension*, select the **Dimension Type**, then select a branch or *filter* and drag it down to the **View Edge Assignments** on top of the existing *dimension*.

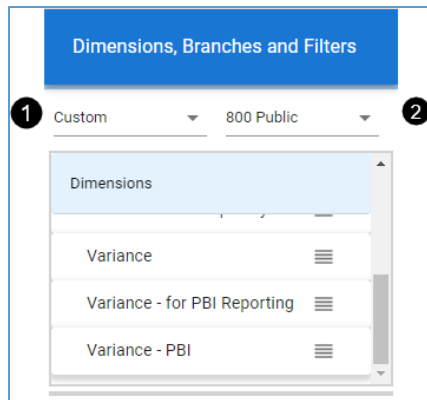


Add a dimension

To add a *dimension*, drag the *dimension* below or above an existing *dimension*.

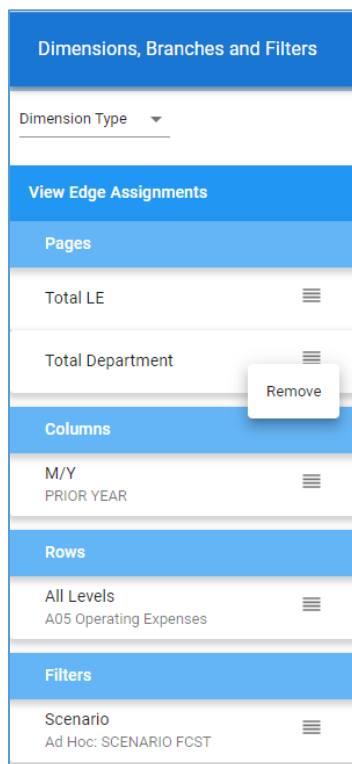


To add a custom *dimension*, select **Custom**, and then select the **Category** of the custom *dimension*.



Remove a dimension

To remove a *dimension*, in the **View Operations** drawer, right click on the bar icon  to the right of the *dimension* and select **Remove**.



Row and column branch functions

You can control the level of detail shown for the dimension-branches on the **Row** and **Column** edges of your *view* by right clicking on the branch name:

Rev - Variance
NOTTRANSLATION, amounts not scaled.

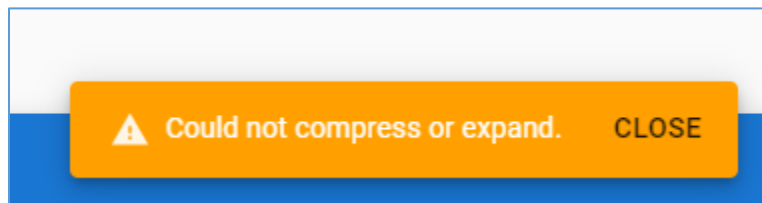
EXMP - Adjustment
ALL

Variance Revenue Account
Budget|Aug-2019 Sales Discount

Custo	Product	+Product		-Product		+Product		-Product		-Total	Comments
		Line 0004	Group 0001	Line 0002	Group 0002	Line 0003	Group 0003	Product			
+JPN	Compress: One Level	618,315	5,025,932	2,824,498	2,824,498	1,440,746	1,440,746	9,291,176			
+THA	Compress: All Levels	177,473	1,300,781	724,680	724,680	370,836	370,836	2,396,296			
+TWN	Expand: One Level	191,175	1,339,437	743,153	743,153	380,866	380,866	2,463,456			
	Expand: All Levels										
-Asia		6,679,188	986,962	7,666,150	4,292,330	4,292,330	2,192,447	2,192,447	14,150,927		
+ESP Spain		42,793	6,387	49,180	27,516	27,516	14,059	14,059	90,755		
+FRA France		45,141	8,253	53,394	29,395	29,395	15,108	15,108	97,897		
+ITA Italy		44,554	7,787	52,341	28,925	28,925	14,846	14,846	96,112		
-Europe		132,489	22,427	154,916	85,836	85,836	44,013	44,013	284,764		
+CAN Canada		11,192	2,105	13,297	7,302	7,302	3,757	3,757	24,355		
+USA United States		90,195	10,696	100,891	55,290	55,290	28,114	28,114	184,295		
-North America		101,386	12,801	114,187	62,592	62,592	31,871	31,871	208,650		
-Total Customer		6,913,063	1,022,189	7,935,253	4,440,759	4,440,759	2,268,331	2,268,331	14,644,342		

The hierarchical relationships in the selected branch control the compression and expansion.

If you reach the limit of compress or expand, you will see a message in the lower right corner of the window like this:



The message will automatically disappear in a few seconds if you do not click **CLOSE**.

View functions

There is a wealth of functions at your disposal to explore the data in your *view*, identical to those available in the CONTROL® Information Navigator.

Select a cell or a range of cells and right click to see your options:

Rev - Variance								
NOTRANSLATION, amounts not scaled.								
EXMP - Adjustment								
ALL								
Variance			Revenue Account					
Budget Aug-2019			Sales Discount					
Customer	Product							
	+Product Line 0001	+Product Line 0004	-Product Group 0001	+Product Line 0002	-Product Group 0002	+Product Line 0003	-Product Group 0003	-Total Product
+JPN Japan	4,407,617	618,315	5,025,932	2,824,498	2,824,498	1,440,746	1,440,746	9,291,176
+THA Thailand	1,123,308	177,473	1,300,781	724,680	724,680	370,836	370,836	2,396,296
+TWN Taiwan	1,148,263	191,175	1,339,437	743,153	743,153	380,866	380,866	2,463,456
-Asia	6,679,188	986,962	7,666,150					14,150,927
+ESP Spain	42,793	6,387						90,755
+FRA France	45,141	8,253						97,897
+ITA Italy	44,554	7,787						96,112
-Europe	132,489	22,427						284,764
+CAN Canada	11,192	2,105						24,355
+USA United States	90,195	10,696						184,295
-North America	101,386	12,801	114,187	62,592	62,592	31,871	31,871	208,650
-Total Customer	6,913,063	1,022,189	7,935,253	4,440,759	4,440,759	2,268,331	2,268,331	14,644,342

There are six function categories, and their behavior and intended uses are:

Function	Description
Drill > Down	<p>For summary <i>level</i> members, shows all the child members that constitute that summary member at the next lower level of detail, and hides all the other information in the <i>view</i>. Drilling down on a row or column title drills that member, leaving members of all other branches unchanged. Drilling down on a data cell drills simultaneously on both the row and column branches.</p> <p>The resulting data replaces the currently displayed data.</p>
Drill > To Data	<p>Creates a <i>view</i> on another tab expanding the selected data to present additional detail, typically expanding and reorienting the branches.</p> <p>You can navigate the resulting <i>view</i> without affecting the presentation in the original <i>view</i>.</p>

	The data is shared with the original <i>view</i> , and for updateable <i>views</i> , changes in one are reflected in the other.
Drill > To Source	Creates a <i>view</i> on another tab with the source data for the selected cell or cells; for example, accounts payable transactions for an expense account. If there are multiple sources for the selection, you will be asked to choose the one you want to see. If there are no sources, you will receive a message to that effect.
Undrill > One Level	Reverses the effect of the previous drill operation on the selected <i>dimension</i> or <i>dimensions</i> .
Undrill > All Levels	Reverses the effect of all previous drill operations on the selected <i>dimension</i> or <i>dimensions</i> .
Compress > One Level	Reduces the level of detail for the selected member or members by one level. Compressing on a row or column title compresses that member, leaving all other members of that branch and all other branches unchanged. Compressing on a data cell compresses simultaneously on both the row and column branches. The resulting data replaces the currently displayed data.
Compress > All Levels	Like Compress > One Level , except that all detail for the selected member(s) is removed.
Expand > One Level	Adds one additional level of detail for the selected member(s).
Expand > All Levels	Adds all available detail for the selected member(s)
Hide > Selected	Hides the selected member(s) on the row, column, or both.
Hide > Unselected	Hides everything but the selected member(s).
Hide > Zero Members	Hides any members in the selection for which the data is identically 0 for the current page.



Theme 2 – Banded for readability

NOTTRANSLATION, amounts not scaled.										
EXMP - Adjustment										
ALL										
Variance Revenue Account										
Budget/Aug-2019 Sales Discount										
	A	B	C	D	E	F	G	H	I	J
1		Product								
2	Customer	+Product Line 0001	+Product Line 0004	-Product Group 0001	+Product Line 0002	-Product Group 0002	+Product Line 0003	-Product Group 0003	-Total Product	Comments
3	+JPN Japan	4,407,617	618,315	5,025,932	2,824,498	2,824,498	1,440,746	1,440,746	9,291,176	
4	+THA Thailand	1,123,308	177,473	1,300,781	724,680	724,680	370,836	370,836	2,396,296	
5	+TWN Taiwan	1,148,263	191,175	1,339,437	743,153	743,153	380,866	380,866	2,463,456	
6	-Asia	6,679,188	986,962	7,666,150	4,292,330	4,292,330	2,192,447	2,192,447	14,150,927	
7	+ESP Spain	42,793	6,387	49,180	27,516	27,516	14,059	14,059	90,755	
8	+FRA France	45,141	8,253	53,394	29,395	29,395	15,108	15,108	97,897	
9	+ITA Italy	44,554	7,787	52,341	28,925	28,925	14,846	14,846	96,112	
10	-Europe	132,489	22,427	154,916	85,836	85,836	44,013	44,013	284,764	
11	+CAN Canada	11,192	2,105	13,297	7,302	7,302	3,757	3,757	24,355	
12	+USA United States	90,195	10,696	100,891	55,290	55,290	28,114	28,114	184,295	
13	-North America	101,386	12,801	114,187	62,592	62,592	31,871	31,871	208,650	
14	-Total Customer	6,913,063	1,022,189	7,935,253	4,440,759	4,440,759	2,268,331	2,268,331	14,644,342	
15										

Simple Theme – Clean presentation format

NOTTRANSLATION, amounts not scaled.										
EXMP - Adjustment										
ALL										
Variance Revenue Account										
Budget/Aug-2019 Sales Discount										
	Product									
Customer	+Product Line 0001	+Product Line 0004	-Product Group 0001	+Product Line 0002	-Product Group 0002	+Product Line 0003	-Product Group 0003	-Total Product	Comments	
+JPN Japan	4,407,617	618,315	5,025,932	2,824,498	2,824,498	1,440,746	1,440,746	9,291,176		
+THA Thailand	1,123,308	177,473	1,300,781	724,680	724,680	370,836	370,836	2,396,296		
+TWN Taiwan	1,148,263	191,175	1,339,437	743,153	743,153	380,866	380,866	2,463,456		
-Asia	6,679,188	986,962	7,666,150	4,292,330	4,292,330	2,192,447	2,192,447	14,150,927		
+ESP Spain	42,793	6,387	49,180	27,516	27,516	14,059	14,059	90,755		
+FRA France	45,141	8,253	53,394	29,395	29,395	15,108	15,108	97,897		
+ITA Italy	44,554	7,787	52,341	28,925	28,925	14,846	14,846	96,112		
-Europe	132,489	22,427	154,916	85,836	85,836	44,013	44,013	284,764		
+CAN Canada	11,192	2,105	13,297	7,302	7,302	3,757	3,757	24,355		
+USA United States	90,195	10,696	100,891	55,290	55,290	28,114	28,114	184,295		
-North America	101,386	12,801	114,187	62,592	62,592	31,871	31,871	208,650		
-Total Customer	6,913,063	1,022,189	7,935,253	4,440,759	4,440,759	2,268,331	2,268,331	14,644,342		

Your choice of themes applies to all of your open views. Your preference is not saved for your next session.



Numeric formats

The **Style** definition for your variables or custom members controls the numeric format of the data in your *views*; for example, dollar signs, commas, percent symbols, etc.

Revenue Account (Level)		
Prototype object view (Dynamic) View		
Updating: Clear and Insert Filter:		
ID	Name	Style
4300	Shipping Charges	(9,999)
4600_P	Other Incomes - %	99.99%
4600_A	Other Incomes - \$	(9,999)
4600	Other Incomes	(9,999)
400_REV	Net Revenue	(9,999)
5000_UNIT	Direct Labor Cost/UNIT	(9,999)
5000_ADJ	Direct Labor Cost Adjustment	(9,999.99)
5000	Direct Labor Cost	(9,999)

	A	B
1		Product
2	Revenue Account	Product SKU 0001
3	Units	12,095
4	-Price	9.82
5	Gross Sales	118,738
6	Sales Discount	9,499
7	Sales Returns and Allowances	7,124
8	Shipping Charges	4,750
9	Other Incomes	2,375
10	-Net Revenue	99,740
11	MTD	0
12	Open Orders	0
13	-MTD+Open Orders	0

The **KCI Browser Format** *code* object translates the styles for the web browser. The **Target** column defines the numeric style in the application, and the **Base** column defines the equivalent style for the web.



KCI_Browser Format (Code)	
Prototype object view (Dynamic) View	
Updating: Clear and Insert Filter:	
Target	Base
(\$,999)	CBS
(\$,999.9)	CBS
(\$,999.99)	CBS
(\$,999.9999)	CBS
(9,999)	BZS
(9,999.9)	BZS
(9,999.99)	BZS
(9,999.9999)	BZS
-\$,999	CMS
-\$,999.9	CMS
-\$,999.99	CMS
-\$,999.9999	CMS
-9,999	MZS
-9,999.9	MZS
-9,999.99	MZS
-9,999.9999	MZS
9999	M
99%	P
99.9%	P
99.99%	P
Color Scale	Exception
Color Scale %	Exception
Data	BZS
DU(\$,999)	CBS
DU(\$,999.99)	CBS
DU(9,999)	BZS
DU(9,999.99)	BZS
DU-\$,999	CMS
DU-\$,999.99	CMS
DU-9,999	MZS
DU-9,999.99	MZS
Highlight Progression Bar %	Exception
Special Method Column	Exception
SU(\$,999)	CBS
SU(9,999)	BZS
SU(9,999.99)	BZS
SU-\$,999	CMS
SU-\$,999.99	CMS
SU-9,999	MZS
SU-9,999.99	MZS
Suppress Zeros	N

Web Formatting		
Code	Meaning	Example
P	Percentage: places a percent sign after the number.	8.25%
C	Currency: Places a currency sign before the number.	\$456.00
A	Accounting notation (DR, CR): Places the appropriate accounting code after the number.	456CR
M	Leading Minus Sign: Places a minus sign before a negative number.	-456
E	Ending Minus Sign: Places a minus sign after a negative number.	456-
B	Brackets: Encloses a negative number in parentheses.	(456)
N	Null: Uses blanks for zero data.	
Z	Explicit Zeros: Displays zeros rather than blanks for zero data.	0.00
S	Separators: Places commas (or blanks) every three digits, depending on local usage for the server running the CONTROL engine.	3,456.00

For example, **BZS** means enclose negative numbers in brackets, display zeros rather than blanks, and place commas every three digits "(4,560)".

There are some new conventions to display single (SU) or double (DU) underlines that you define in the **Target** column; for example, DU(9,999), or SU(9,999).

If a variable or custom member has no style specified, then the format defaults to Data | BZS, with no decimals "(1,257)".

Cell highlighting

CONTROL® Web supports a limited number of cell highlighting styles for exceptions to help you recognize cells that have certain characteristics:

	A	B	C	D
1		<u>Time Period</u>		
2	<u>Revenue Account</u>	+Year 2018	Jan-19	Feb-19
3	Units	3,644,113	349,929	351,688
4	Price - Starting Point	0.00	0.00	0.00
5	Price - Increase %	0.00%	0.00%	0.00%
6	-Price Calc	0.00	0.00	0.00
7	Price - Estimated	0.00	0.00	0.00
8	Price - Manual Override	0.00	0.00	0.00
9	-Price	4.19	4.45	3.83
10	-Price w Adj	4.19	4.45	3.83
11	Gross Sales Adj	0	0	0
12	-Gross Sales	15,264,334	1,416,272	1,223,848
13	-Sales Discount - %	1.50%	1.50%	1.50%
14	Sales Discount - \$	0	0	0
15	-Sales Discount	228,965	21,244	18,358
16	-Sales Returns and Allowances - %	2.70%	2.70%	2.70%
17	Sales Returns and Allowances - \$	0	0	0
18	-Sales Returns and Allowances	412,137	38,239	33,044
19	-Shipping Charges - %	1.18%	1.18%	1.18%
20	Shipping Charges - \$	0	0	0
21	-Shipping Charges	179,847	16,687	14,420
22	-Other Incomes - %	1.08%	1.08%	1.08%
23	Other Incomes - \$	0	0	0

Wrap column headings

View column headers that include the bar character "|" will now perform a carriage return in place of the bar, similar to the Excel interface.



ID	Name
CY_ACT_AUG	Actual Aug-&Left(&MONTHOFFSET(&HDR_CY_STR,7),4)
CY_BUD_AUG	Budget Aug-&Left(&MONTHOFFSET(&HDR_CY_STR,7),4)
CY_ACT_CY_BUD	CY Actual vs CY Budget Aug Var

[RO] Exp - Basic - FCST
NOTRANSLATION | Amounts not Scaled

Department
-Total Company

	A	B	C	D	E	F	G	H	I	J
1		Variance								
2	FS - Account	Actual Aug-2019	Budget Aug-2019	-CY Actual vs CY Budget Var	-CY Actual vs CY Budget %	Actual YTD-Aug-2019	Budget YTD-Aug-2019	-CY Actual vs CY Budget YTD Var	-CY Actual vs CY Budget YTD %	Budget YR-2019
3	Full Time Equivalent	923	882	(41)	-4.6%	923	882	(41)	-4.6%	906

Data input

You can input data in an updatable view, similar to the Excel interface, including:

- Direct input by cell
- Copy and paste
- Drag and fill
- Shortcut keys, for example, A25%, S100K, etc.
- Solve
- Comments

You can also enter variable **Lookup** values, for example, **InActive**.

Note: The web interface does not support a drop-down list of **Lookup** values. In addition, you cannot delete values, but only enter and change them to a different value.

PR - Input - Style 2 - FCST
USD | Amounts not Scaled

Scenario
Forecast

Acct - PR
Employee Status (Input)

	A	B	C	D	E	F	G
1		Time Period					
2	Employee	Department	Aug-19	Sep-19	Oct-19	Nov-19	Dec-19
3	EMP_0001	LA - Admin	Active		InActive		
4	EMP_0002	LA - Admin	Active				

Note: Enter percentages as a decimal even though the cell is formatted as a percent, for example, to enter **10.5%** you would enter **.105**.

The screenshot shows the CONTROL Web interface with a blue header. The header contains navigation icons (hamburger menu, folder, refresh, undo, home, keyboard) and a title box that says "Rev - Input - Style 2" with a subtitle "NOTRANSLATION | Amounts not Scaled". Below the header, there are labels for "Scenario" (Forecast) and "Revenue Account" (Price - Increase %). The main area is a table with columns A through E and rows 1 through 3.

	A	B	C	D	E
1		<u>Time Period</u>			
2	<u>Product</u>	<u>Customer</u>	+Year 2018	Jan-19	Feb-19
3	Product SKU 0001	Customer 0027	0.00%	10.50%	.105

Administrator notes

CONTROL® Web was designed with the goal of being usable without any additional CONTROL® administrative effort. Moreover, as your application grows and changes, the new features and data should be available to Web users instantly – no new reports to design or processes to run.

With that said, it is important to understand how you could customize the CONTROL® Web experience.

Predefined filters and branches

To make CONTROL® Web easy to use with minimal training, it only supports pre-defined *filters* and branches. Therefore, you should create as many useful pre-defined *filters* and branches that users can choose from when designing *views* on the web. You should also update the **Interface Usage** property of both *filters* and branches, so users will only see those that are useful for reporting. For more information about how to update the **Interface Usage** property, watch the video at <https://vimeo.com/433725896>.

How the application menu works

CONTROL® Web supports *views*, *books*, and *scripts*:

All types of *views* can be used – Computational, Source data, Bill of Materials, Object, and Administrative. At this time, flex *views* are not supported.

Execution of Action, SQL, and API *scripts* is supported. Program *scripts* are not supported.

When the application *menu* is retrieved for CONTROL® Web, the following customizations are performed:

- Any *menu* items that are not *views*, *books*, *scripts*, *sheets*, or *menus* are removed
- Program *scripts* are removed
- Flex *views* are removed
- Dynamic *books* are removed
- Any *sheets* that contain only one *view* are treated as a *view*. Other *sheets* are removed.
- All *books* are treated as expanded, with a *menu* node for the *book*. Unsupported pages such as *forms* are removed.
- Empty grouping nodes of the *menu* are removed

Of course, any items that the user does not have object access to are removed.

Mobile menu

There is no need to create a special *menu* for CONTROL® Web users. However, if you want to customize the experience for your web users, you can do so by creating a *menu* structure specifically designed for web and mobile use.

Create the *menu* and sub-*menus* using the administrator functions in CONTROL®, and then assign the new *menu* to the user's **Mobile Menu** property:

The screenshot shows the 'Properties for User Administrative User' dialog box in the CONTROL® administrator interface. The dialog box is open over a spreadsheet-like view. The 'Mobile Menu' property is selected, and its value is 'Mobile Menu (ID: MOBILEMENU)'. Other properties visible include 'E Mail Address' (kailu@kcicorp.com), 'Job Title' (None), 'Location' (None), 'Org Unit' (None), 'Phone' (310)-921-6222, 'Parameters', 'Logging', 'Accessibility', and 'Other Options' (Default Menu: EXMP Menu (ID: EXMP_MENU), Login Script: (None)).

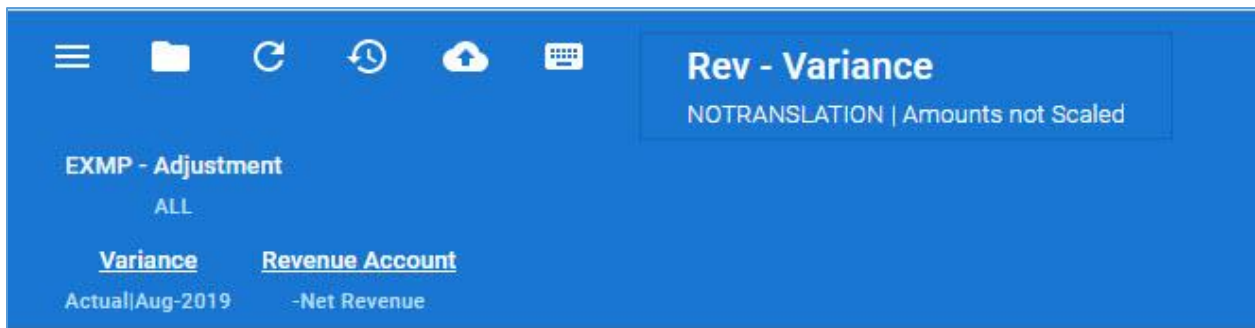


CONTROL® Web will use the **Default Menu**, if the **Mobile Menu** property is blank.

To minimize maintenance as your application evolves, you may want to use dynamic *menu* items or dynamic *menus*, which automatically include new *views* or *scripts* that you place in specified *categories*.

Customizing the view header

The default *view* header displays the *view* name in bold, and the *view's* currency and scale factor in smaller font on the row below.



You can use a **Keyword Collection** to override and customize the *view* header if required. As a best practice, if you plan to customize your headers, you should consider creating a single *keyword collection* to use with your web or mobile *views* and create a new instance for specific *views* when necessary.

For example, create a *keyword collection* named **Wander Headers**, and define the default instance with *keywords* for a standard header:

Sequence	KeywordOrCollection	Replacement
1	WanderHeader_01	&ViewCurrency &HDR_SCALE_FACTOR
2	WanderHeader_02	Current Month: &DisplayMonth(&Current_Month)

#	Keyword/Collection	Replacement	Comment
1	WanderHeader_01	&ViewCurrency	
2	WanderHeader_02	Current Month: &	

Then, for *views* that require a variation from the default instance, create a new instance and name it with the ID of the respective *view*, for example, **EXMP_REV_BASIC_FCST**.

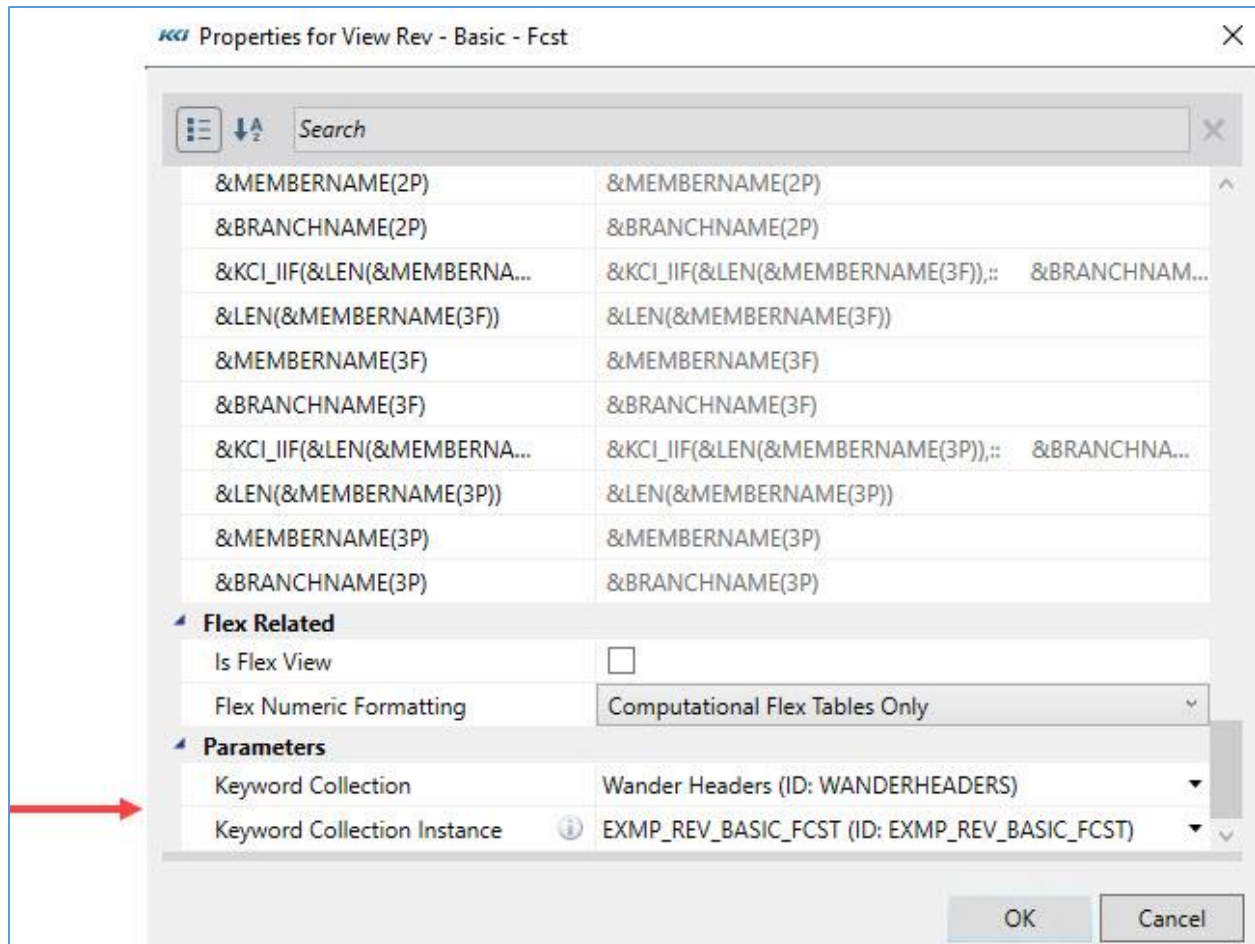
Sequence	KeywordOrCollection	Replacement
1	WanderHeader_01	&ViewCurrency &HDR_SCALE_FACTOR
2	WanderHeader_02	Current Month: &DisplayMonth(&Current_Month)
3	WanderHeader_03	Prepared by: &UserName

The *keyword collection* must include *keywords* with the prefix **WanderHeader**, for example, **WanderHeader_01**, **WanderHeader_02**, etc.

Sequence	KeywordOrCollection	Replacement
1	WanderHeader_01	&ViewCurrency &HDR_SCALE_FACTOR
2	WanderHeader_02	Current Month: &DisplayMonth(&Current_Month)

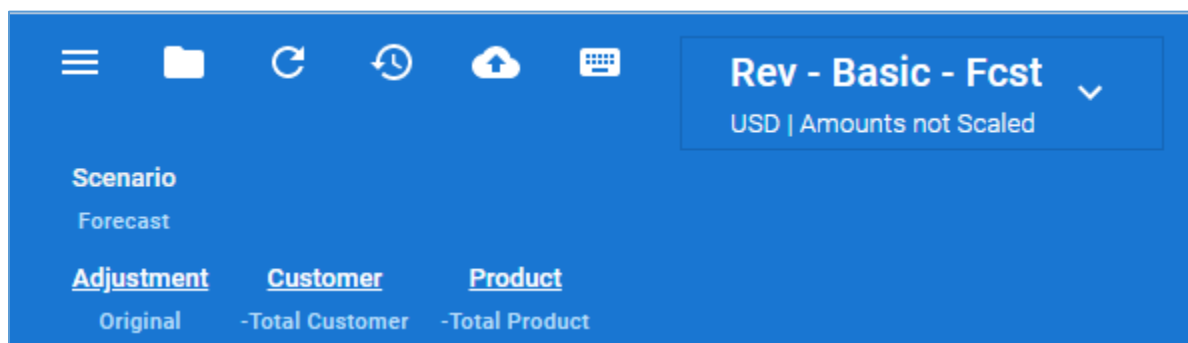
Note: The **WanderHeader** *keywords* do not have to be predefined *keyword* objects.

Now you can update the *view's* **Keyword Collection** and **Keyword Collection Instance** properties.

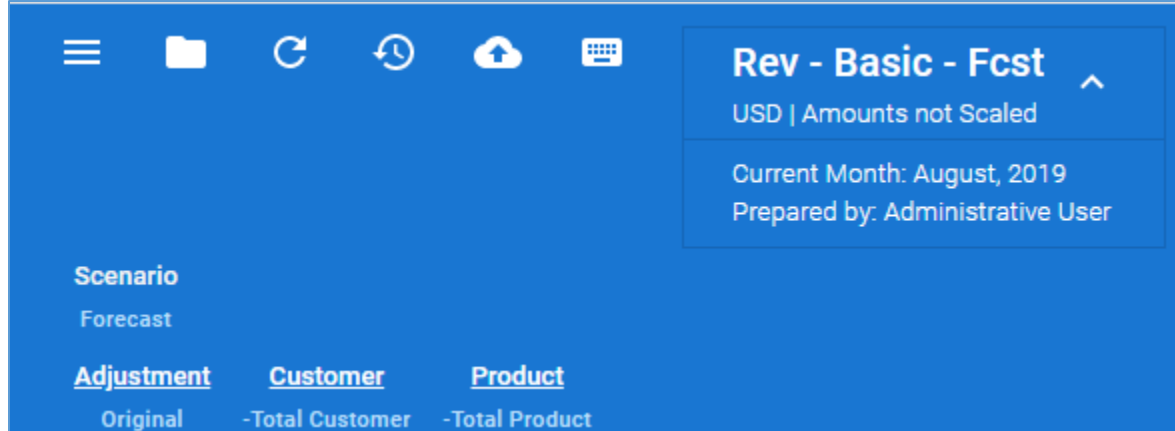


By adopting this best practice, you will reduce the number of *keyword collections* you have to manage because the *keyword collection* is reusable across multiple views.

The resolved value of the first **WanderHeader** keyword in the *keyword collection* will replace the view's default currency and scaling information in the row below the view's name. (In our example, the first **WanderHeader** keyword defined the view's currency and scale factor.)



If there are additional rows headers, click the down arrow to display them.



There is no requirement to create any *keyword collections* if you are satisfied with the default header.

Note: The default header references the **&HDR_SCALE_FACTOR** *keyword*, so you should verify that it is defined in your database. If it is not, then KCI can supply an object manifest that includes it.

Technical notes

CONTROL® Web requires two additional servers. The first server is a Windows based application server that supports both CONTROL® Web and CONTROL® Mobile (CONTROL® for the iPad). This application server interfaces with the same database used by CONTROL® for Excel. The second required server is a Linux server that will host the Envoy web proxy server as well as the CONTROL® Web server component. These two servers should be co-located on the same network segment to achieve the fastest possible network speed.

For more details of the hardware requirements and installation procedures, please refer to the "CONTROL Setup Guide 10.4".

The typical installation time is one hour.