ACTIVANT

Eclipse Application Maintenance

Release 8.6.5 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.5 (Eterm) Online Help System

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Application Maintenance Overview

You can customize the system to meet your company's needs for different applications—anything from setting up each user with a unique application interface to linking your company terminals and printers to each other and the host system.

Use application maintenance programs to define the dates your business is closed, to maintain current area codes for all of your entities and contacts, and to create musical tunes that alert users to system messages. You can also customize the application so that all menus, screens, and order entry views help your users to attain high-level performance.

Use the following application maintenance programs to tailor the system to meet your company's unique requirements:

Program	Use to...
Terminal Setup	define the interface between your company's terminals and the host system.
User Maintenance	assign each user in your company a user ID, as well as application access and authorization.
Printer System	define printers to use with the system, assign printers to terminals, assign forms to each printer, and define formats for all forms.
Custom Menus	set up menus to meet your company's and users' needs. Tailor standard menus by creating custom menus.
User Defined Functions	define subroutines and formats for printing labels, importing text files, and creating custom screens.
Order Entry Views Maintenance	create order entry views for users and assign those and standard order entry views to users.
Customer/Vendor Standard Notes	define standard shipping and internal notes for sales, purchasing, and transfer order transactions.
Business Closed Days	define the days that you are closed for business, such as holidays and weekends.
Area Code Updating	maintain all entity and contact area codes.
Music Composer	compose unique tunes to use to alert users when they have received a message.

Setup Requirements for User Maintenance

The User Maintenance program uses the following control maintenance records and authorization keys.

Control Maintenance Records

Set the following control maintenance records:

- Change OS Password When Eclipse Password Is Change
- Enable User ID Prompt For Password Authentication
- Number of Passwords To Be Saved Before They Can Be Reused
- Seconds Of Inactivity Before Requiring Relog
- Tune/Song To Play At Logon
- Valid Message Group Types
- Valid Palm Buy Line Product Download
- Valid Palm Price Line Product Download

Authorization Keys

Assign the following authorization keys:

- AUTH.PWD.MAINT
- MESSAGE.GROUP.TYPES
- USER.BRANCH.MAINT
- USER.KEY.MAINT
- USER.MAINT.ALLOWED
- USER.PASSWORD.EDIT
- USER.TERR.MAINT
- USER.VIEW.SELECT

  Note: All of these authorization keys are required to access and edit user records.

Setup Requirements for the Printer System

Following are the control maintenance records and authorization keys used for the printer system.

Control Maintenance Records

Set the following control maintenance records:

- Default Printer Location For Branch
- Generic Barcode Label Form
- Label Print Quantity Control
- Label Printing Default Print Selection
- Prompt For Confirmation When Pages To Be Printed Exceed

Authorization Keys

Assign the following authorization keys:

- DOWN.LOAD
- SPOOLER.FORWARD.EDIT
- SPOOLER.MANAGEMENT
- SPOOLER.UPLOAD.AUTH

Terminal Setup Overview

The system administrator needs to define defaults for all terminals connected to the host system. These defaults define the interface between the terminal and the system.

For example, you can define a port ID for a terminal. The port ID determines how the terminal connects to the host system and identifies the printers to use as its slave printers. The printers and terminal are connected to the same port.

Eterm, the terminal emulator, can be installed and used on terminals supported by DOS or workstations running Windows.

For more information, see Setting up Terminals.

Setting Up Terminals

Use the Terminal Setup screen to define the defaults that terminals use when running Eclipse. When users enter transactions from a terminal, the system uses the defaults set up for that terminal.

For example, if a terminal's defined pricing branch is branch 1, when a user enters a transaction on that terminal, the system applies branch 1 pricing to the transaction. Users can override defaults, as needed.

After you set up terminal defaults for a user, you must log that user out of Eterm and then back on for the terminal defaults to take effect. You must also assign the port ID to the user's terminal from Eterm's Configure menu. If you do not assign the port ID, the terminal defaults do not take effect.

Use the following tasks to:

- Set up terminals.
- Apply terminal defaults to a user.

To set up terminals:

1. From the **System > System Files** menu, select **Terminal Setup** to display the Terminal Setup screen.
2. In the **Search Criteria** field, do one of the following:
   - To display all terminals, press **Enter**.
   - To display a specific terminal, enter a terminal ID and press **Enter**.
3. In the **ID** column, select one of the following:
   - A terminal ID for which to set up defaults. Use the **Find** hot key to locate a terminal in a long list. At the prompt, enter all or part of the name to find. This field is case-sensitive.
   - A blank line. Type an ID to identify a new terminal ID. This field is case-sensitive.

   Note: This field is case-sensitive.

   The terminal ID is also the port ID. This ID identifies the port the terminal uses to connect to the host system.
4. In the **Prc Brch** field, enter the default pricing branch that the system should assign to sales transactions entered from this terminal.

   If you do not enter a default pricing branch, the system prompts the user to specify a pricing branch during order entry.
5. In the **Shp Brch** field, enter the default shipping branch that the system should assign to sales transactions entered from this terminal, unless a **Shipping Branch Override** is assigned to the customer.

If you do not enter a default shipping branch, the system uses the branch entered in the **Shipping Branch Override For SOE**control maintenance record. If that record is blank, the system uses the pricing branch.

Note: If you change the shipping branch on an order and then procure an item, the system assigns the shipping branch entered here to the procurement transaction.

6. In the **Location** field, press **F10** and select the printer location associated with this terminal ID.
7. If this is a modem or hand-held terminal, in the **T** field, enter one of the following:
   - **R –** The port is for a hand-held radio frequency terminal used in a warehouse for picking and putting away a product.
   - **M –** The port is for a modem connection used for dialing into your system.

   Note: A user must have Remote Logon OK flagged in User Maintenance to use this port to log on to the system.

8. If this is a counter terminal, in the **RL** field indicate whether to prevent employees from creating orders at a counter terminal under someone else's login name.
   - **Y –** The system logs users completely off each time they complete a sales order with a Pick Up Now status. The next user must enter a user name and password to access the system. If an order is still open and displayed on the screen, the system does not log the user off.

     In addition, the system logs the user off after the terminal is inactive for the time specified in the **Seconds Of Inactivity Before Requiring Relog** control maintenance record.
   - **N –** The system does not log users off each time they complete a sales order.

   Note: There is also an **L** option in the **RL** field. **L** applies to the counter terminals that are running the Solar Eclipse interface. If you set those terminals to **L**, the system locks the terminal after the user completes a Pick Up Now order without logging the user completely off of the system. When the user enters their password to log back in, the system returns the user to the window they were in when the terminal locked. Setting the **RL** field to **L** for Eterm terminals acts the same as setting it to **Y**.

9. In the **Sales Source** field, press **F10** and select the primary sales department, such as counter sales, inside sales, or outside sales, that will use this terminal.

   If left blank, the system prompts the user to choose a sales source at order entry.
10. In the **Ship Via** field, press **F10** and select the default method for transferring products ordered from this terminal to the customer. For example, a counter terminal may use Pickup as the default ship via.

If a customer does not have a default ship via assigned in Customer Maintenance and you leave this field blank, the system prompts the order taker at this terminal to enter a ship via for the customer's order.

11. Use these additional hot keys as needed:

Hot Key	Function
Slave Printer	Displays the Slave Printer Assignment screen, where you assign a default printer to a terminal ID, based on the defined printer location. If you do not define a printer location for a user, the system uses the default printer assigned to the terminal. If you do not select a printer location default for a terminal, or if you try to change a location, the user is prompted to select from the locations assigned to the physical branch in which the terminal is located.
Branch	Assigns branches associated with the terminal. • In the **Local Storage Branch** field, enter the branch that determines the image storage locations and physical areas available to this terminal. If the system cannot find a place to store an image, it uses the default storage location defined for the branch. The default branch is the user's home branch. • In the **Physical Branch** field, enter the branch where the terminal resides. **Note:** This setting does not determine where documents print.
Solar Reporter	Reserved for future use.

12. Press **Esc** to save your changes and exit the Terminal Setup screen.

To apply terminal defaults to a user:

1. After setting up a terminal's defaults on the Terminal Setup screen, log the user off the system.
2. From the **Eterm** > **Configure** menu select **Communications** to display the Configure Communications screen.
3. In the **ID** field, enter the port ID assigned to the user's terminal for which you are applying the terminal settings.
4. Click **OK**.
5. Log the user back onto the system to apply the terminal defaults to the user.

Setting Terminals to Require Passwords After Inactivity or Pick Up Now Orders

For terminals that are running Solar Eclipse that multiple people have access to, such as terminals at your sales counter or in your warehouse, you can set the terminal to require a password to access Solar Eclipse on that terminal under the following circumstances:

- After the time set in the Seconds Of Inactivity Before Requiring Relogcontrol maintenance record has passed with no activity at the terminal.
- After completing an order with a Pick Up Now status.

Setting a terminal to require a password to access Solar Eclipse prevents employees from using the terminal under someone else's login name, and also allows faster access to the application because the application is still running. When the user returns to the terminal and enters their password, the system returns them to the window they were in.

For example, set individual terminals to lock access to the Solar Eclipse screens each time a sales order with a Pick Up Now status is completed, giving the employee an opportunity to walk away from the terminal to gather the items for the customer standing at the counter.

To set a terminal to require a password after inactivity or pick up now orders:

1. From the **System > System Files** menu, select **Terminal Setup** to display the Terminal Setup screen.
2. In the **Search Criteria** field, enter the ID of the terminal and press **Enter**.
3. In the **RL** field for the terminal, enter **Y** to require a password to access the terminal each time the user closes the Sales Order Entry window for a Pick Up Now order, or uses **Ctrl .** (period) to start a new order.

   If an order is still open and displayed on the screen, the system does not log the user off.

   In addition, if you set the **RL** field to **Y**, the system requires a password to access Eclipse after the terminal is inactive for the time specified in the **Seconds Of Inactivity Before Requiring Relog** control maintenance record.
4. Press **Esc** to save your changes and exit the terminal.

User Maintenance Overview

The system stores a variety of information about users, such as their:

- Authorization to perform specific tasks.
- Order entry views.
- Individual application setups.
- Branches to which they have access.
- Passwords.

The system administrator assigns an ID and creates a record in User Maintenance for each person who uses the system.

Authorized users can edit their own records to set user defaults related to their individual job functions. Otherwise, the system administrator must set up each record to be unique to the user's job functions.

User Record Creation Overview

When the system is installed, it includes one user ID with superuser authority. The system administrator can log in using this ID and then create user IDs for all other users. Once the system administrator has set up a user's ID, the user should log in and change the password.

Prototyping

After a user record has been created in the system, you can create additional user records using the prototyping function. This function creates new records with the same settings so that you do not have to re-enter the same information for similar users.

For example, if you create user records for two new employees in accounting, you can define all of the parameters for the first user record and then start to create the second user record. You then apply parameters from the first user record to the second user record, and edit the fields as needed.

Virtual Users

You can also create virtual user records that function like queues. For example, you can create a user ID called REQUESTS. Trackers sent to the REQUESTS user ID reside in the job queue for that ID. You can then authorize other users to monitor the job queue and to respond to the REQUEST trackers.

Creating User Records

The system administrator is responsible for creating user records, which store information about all system users, their authority to perform specific tasks, their individual application setup parameters, and their passwords.

The final step in creating a user record is to assign the user a password on the Password Maintenance screen.

The setting in the Enable User ID Prompt For Password Authentication control maintenance record determines whether users are required to enter their user ID and password or just their password when logging in.

If users log in using just a password, each user must have a unique password. If you enter a password that is already in use, the system displays an invalid password error message and requires you to choose a different password. In addition, the system disables the other user's password and notifies them of the situation through the message system. The other user also needs to select a new password.

After you create one user record, you can use the prototyping feature to create additional user records.

To create a user record:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.

   Note: You must be assigned the USER.MAINT.ALLOWED authorization key to access this screen.

2. In the **User ID** field, type the word **new** and press **Enter**, then type the new user ID and press **Enter**.

   Note: If you create a user record right after having displayed or created another user record, the system prompts you to use the previous user's record as a prototype for the new one you are creating.

3. Complete the fields and assign the options displayed on the screen, as needed.

   The **Full Name** and **Root Menu** fields are required.

4. Use the **Acct** hot key to display the Accounts screen, and assign the Eclipse software accounts in which this user can work. In addition to the live account, your company may have play accounts for training purposes.

   For each account you want to assign, position the cursor on a blank line, press **F10**, and select the account.

5. Use the **Brchs** hot key to display the Accessible Branches screen and assign the branches and territories for which the user is authorized to enter transactions.

6. Use the **Auth Keys** hot key to assign the user authorizations..

   Note: Several authorization keys are required to access and update user records.

7. Use the remaining hot keys and additional hot keys as needed.

   Note: The **Passwd** hot key is not active when creating a user record.

8. Press **Esc** to display the Password Maintenance screen.
9. Complete the following fields to define the parameters for creating a password for this user. If you leave a field blank, that parameter has no restrictions.

Password Parameter	Description
Min Password Length	Minimum number of character for a password.
Min New Characters	Minimum number of new characters you must include in a password. New characters are letters or symbols not appearing in the previous password.
Min Numeric Characters	Minimum number of numbers that you must include in the password. This prevents the user from creating passwords solely using words.
Min Alpha Characters	Minimum number of letters or symbols that you must include in the password. This prevents the user from entering passwords consisting solely of number sequences.
Suggest Change Every: xxx Days	Number of days after which the system displays a message suggesting that you change your password. You will still be able to log on to the system without changing the password.
Require Change Every: xxx Days	Number of days after which the system requires that you change your password before being able to log on to the system.
Last Change: xxx Days Ago	A number indicating how many days ago your password was last changed. This field is view-only.

10. In the **Enter New Password** field, type a password in lower case and press **Enter**.

    Note: Do not use upper case characters for passwords.

11. At the verification prompt, enter the password again.

    The system saves the user record and returns you to a blank User Maintenance screen.

Entering Basic User Information

Use the fields on the left side of the User Maintenance screen to enter basic user information.

To enter basic user information:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.

   Note: You must be assigned the USER.MAINT.ALLOWED authorization key to access this screen.

2. In the **User ID** field, enter the ID of the user whose record you want to view or update. An ID can contain a maximum of eight characters and cannot contain any imbedded spaces.
3. In the **Full Name** field, enter the user's first and last name.
4. In the **Root Menu** field, press **F10** and select the menu name that determines the system programs to which the user will have access.

   MAIN includes all system menus and is appropriate for the highest-level administrative user. To limit the functions available to different user groups within your company, create custom menus.

   Note: Use the Program Editor to view a report of what is included in a user's root menu.

5. Complete the following fields as needed:

Field	Description
Nickname	The name by which the user prefers to be called. For example, if the user's legal first name is Robert, he may want to be called Bob.
Title	The user's job title, position, or job function. For example, Purchaser or Salesperson.
Department	Department in which the user works. Press **F10** to display a list of valid departments and select one.
Birthdate	The date the user was born. If you enter a birth date, the Happy Birthday message tune plays on the user's birthday.
Msg Tune	A short audio tune that plays when the user receives a system message. Press **F10** and select a tune from the list. To create your own tune, use the Music Composer.
Sort By	How the system sorts the user's full name in lists, searches, and reports. For example, D.DOEJAN for Jane Doe sorts by D and DOE for Doe before sorting by JAN for Jane. The system populates this field with the user ID. Enter new sort by criteria if necessary.
WO Recall	A number that identifies the default Work Order Entry view for this user when recalling a work order. Press **F10** and select a view from the list.

Field	Description
WO New	A number that identifies the default Work Order Entry view for this user during work order creation.
Remote Cus	If the user ID is for a customer whom you allow to dial into your system to view information about their account, enter that customer's name in this field. This limits the user's inquiries to data related only to this customer.
Time Zone	The time zone in which this user works. Press **F10** and select a time zone. The default time zone is that of the server to which the user is connected. When scheduling events with users in different time zones, such as conference calls, the system converts event times to each user's own time zone. **Note:** You can assign some time zones with a generic indicator (MT) or an explicit indicator of Daylight Savings Time (MDT) or Standard Time (MST). Regardless of the option you select, the system displays times based on the actual state of Daylight Savings or Standard Time.
Commission Plan	The plan used to determine how this user's commission is calculated, if applicable. Press **F10** and select a commission plan from the list. To assign multiple commission plans to this user ID, use the **Plan** hot key. If multiple commission plans are assigned to this user, *Multi* displays in this field.

6. To complete the process of setting up a user, see Creating User Records.

Setting User Options

Use the fields in the Options section of the User Maintenance screen to identify functions the user can and cannot perform.

To set user options:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.

   Note: You must be assigned the USER.MAINT.ALLOWED authorization key to access this screen.

2. In the **User ID** field, enter the ID of the user whose record you want to view or update.
3. Enter an asterisk (*****) in any of the following fields in the Options section to define special functions for the user record:

Option	Description
Salesperson	Identifies the user as a salesperson. The user can be designated as an inside or outside salesperson in Customer Maintenance or Sales Order Entry.
Enable Break Key	Enables user to abnormally end a session using the **Ctrl+Break** key combination. Only the system administrator should have this ability.
No Logon	Prevents the user from logging on. Use this option for virtual User IDs.
No Messaging	Blocks the user from receiving company messaging. Use this option for customers who place remote orders.
Remote Logon OK	Authorizes the user to log in using a modem.
Picker	Identifies the user as a picker. **Note:** For a user to appear on a picker selection list, you must flag the user as a picker and provide access to the shipping branch associated with the transaction.
No Schedule Prompting	Blocks the user from being listed on the Daily Planner or using the Daily Schedule screen. Use this option for customer and virtual User IDs.
Auto UET Message	Determines whether the system should send a message to the user whenever a transaction the user enters generates an unquality event. Instead of using an asterisk, set the value as follows: • **Blank** – Accepts the system default set in the Auto UET Message Display control maintenance record. • **Y** – Overrides the system default and has the system send a message. • **N** – Overrides the system default and has the system not send a message.

Option	Description
Bypass Eclipse Login	Enables the user, when logging in, to bypass the Eclipse banner screen. After the user logs in through the AIX Unix prompts, the application displays. If the Change OS Password When Eclipse Password Is Change control maintenance record is set to "P" (prompt), and if the user whose Eclipse password has expired is not flagged to bypass the Eclipse Login, the user is prompted to change their OS password when they attempt to create a new Eclipse password in Password Maintenance. If changing a password in System Maintenance/Change Password, the user selects whether to change the OS password.
Credit Manager	Identifies the user as a credit manager. Any program that prompts for a credit manager will check this field in the user's record.
No Job Queues	Disables the user from being added to new trackers, tracker appends, or as the next or last user on a tracker. For example, if an employee leaves your company, set this flag to ensure they are not added to future trackers.

4. To complete the process of setting up a user, refer to the topic Creating User Records.

Using Hot Keys to Enter User Information

Use the hot keys on the User Maintenance screen to edit user records and to view additional user maintenance information.

To use the hot keys to enter user information:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.

   Note: You must be assigned the USER.MAINT.ALLOWED authorization key to access this screen.

2. In the **User ID** field, enter the ID of the user whose record you want to view or update.
3. Use the following hot keys to edit user records and to view additional user maintenance information.

Hot Key	Function
Recall	Restores the User Maintenance screen fields to the data they contained the last time the screen was saved.
Accts	Displays the Accounts screen, where you assign your Eclipse database account to the user. This database contains all your customer, vendor, product, and sales transaction information. On the Accounts screen type the word **eclipse** and press **Esc**. If your company has set up another account for training purposes, you can also assign that account to the user.
Location	Displays the Locations screen, where you assign the printer locations to which this user has access. For example, if a user works Showroom and Counter on different days of the week, set up that user for both printer locations. If you do not define a printer location for a user, the system uses the default printer assigned to the terminal. If you do not select a printer location default for a terminal, and if you try to change a location, the user is prompted to select from the locations assigned to the physical branch in which the terminal is located.
Brchs	Displays the Accessible Branches screen, where you assign the branches to which this user has access.
Terrs	Displays the Authorized Territories screen, where you define authorized territories for this user.
GP Control	Displays the GP% Controls screen, where you assign gross profit percent control parameters to this user.
OE View	Displays the OE View Selection screen, where you assign the order entry views this user is authorized to use.
Fax	Prompts you to enter the user's fax access code.
Delete	Displays a prompt to delete the displayed user. The system prompts you to confirm the deletion.
Passwd	Displays the Password Maintenance screen, where you can edit the user's password.

Hot Key	Function
Auth Keys	Displays the Authorization Key/Template Maintenance screen, where you assign authorization keys that define which tasks the user has permission to do.
Sls Src	Displays the Sales Sources screen, where you assign sales sources to the user. For each sales source, position the cursor on a blank line, press **F10**, and select a source.
Job Desc	Displays the Job Description screen, where you assign job functions to the user. For each job function, position the cursor on a blank line, press **F10**, and select a function, if job functions are defined for your company. If not, enter a free-form description.
Addl	Displays a screen containing additional hot keys.
Plan	Displays the Commission Plans Selection screen, where you can assign multiple commission plans to the user. If you assign multiple plans to the user, ***Multi*** displays in the **Commission Plan** field.
Log	Displays the Maintenance Log Viewing screen, where you view the maintenance log for this record.

4. To complete the process of setting up a user, see Creating User Records.

Using Additional Hot Keys to Enter User Information

Use the additional hot keys on the User Maintenance screen to edit user records and to view additional user maintenance information.

To use the additional hot keys to enter user information:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.

   Note: You must be assigned the USER.MAINT.ALLOWED authorization key to access this screen.

2. In the **User ID** field, enter the ID of the user whose record you want to view or update.
3. Use the **Addl** hot key on the User Maintenance screen to display the following additional User Maintenance hot keys.

Hot Key	Function
Time Clock	Displays the Time Clock Options screen, where you assign time clock options. The user can clock in and clock out when they log in and out of the system.
Expense	Displays the User Expense Maintenance screen, where you enter user expense check information.
Auth Pswds	Displays the Authorization Passwords screen, where you create authorization passwords associated with this user ID.
Job Queue	Displays the User Job Queue/Tracker Settings screen, where you set user job queue and tracker defaults. You can also identify additional users authorized to maintain this user record and create a list of job queue statuses to use for this user ID rather than the statuses defined for the system in Control Maintenance.
Entity Data	Displays the User Entity Data screen, where you link this user to Customer, Contact and Vendor Maintenance records.
Solar	Displays the Solar Eclipse User Maintenance screen, where you define user defaults for Solar Eclipse.
Scheduler	Displays the Scheduler Parameters screen, where you enter default scheduler parameters for this user. These default settings are applied to the Daily Schedule screen for this user.
E-Mail	Displays the Outgoing E-mail Parameters screen, where you enter outgoing e-mail parameters for this user.
Addl Data	Displays the Additional User Settings screen, where you designate additional user settings for the Message System.
Fax	Displays the Fax Default Message for Order Entry, where you can enter a user-specific message to print on the fax cover sheet whenever this user faxes a copy of an order from Order Entry.
EIS Groups	Displays the EIS Groups Selection screen, where you identify which EIS Groups of graphs this user is authorized to generate in the Eclipse Information System.
Imaging	Displays the User Imaging Setting screen, where you enter user imaging parameters.

Hot Key	Function
Warehouse	Display the User Warehouse Options screen, where you enter warehouse options for this user.
Msg Groups	Displays the Message Groups Selection screen, where you assign this user to message groups.
Language	Displays the User Languages Selection screen, where you assign the languages in which this user operates. The user's default language is the first language in the list. If left blank, the default is English.
Palm	Displays the Palm User Maintenance screen, where you define product download parameters for Palm SFA users.
Sync Auth	Reserved for future use.
Phantom	Displays the User Phantom Maintenance screen, where you set the maximum number of phantom processes for the user.

4. To complete the process of setting up a user, refer to the topic Creating User Records.

Using Prototyping to Create User Records

If you create a new user record right after having displayed or created another user record, the system prompts you to use the previous user's record as a prototype for the new one you are creating.

If you use the prototype record, the system populates the fields in the new user record with the information, authorizations, and assignments from the previous record. Edit these settings as necessary.

To use prototyping to create user records:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.

   Note: You must be assigned the USER.MAINT.ALLOWED authorization key to access this screen.

2. In the **User ID** field, type the word **new** and press **Enter**. Then enter the new user ID.

   The system displays the following prompt: **Use last record as Proto (Y/N):**

3. At the prompt, enter **Y**.

   The system copies the authorization, account, and branch assignments from the previous user record. You do not need to use the **Auth Keys**, **Accts**, or **Brchs** hot keys again, unless you want to make changes for this user.

4. Change the information displayed in the remaining fields as needed for the new user.

   For example, enter the new user's name and birth date.

5. Press **Esc** to save the user record and display the Password Maintenance screen.
6. Create a password for this user.

Required User Record Information Checklist

The following table lists the minimum requirements for creating a record in User Maintenance.

Data	Description
Full Name	In the **Full Name** field on the User Maintenance screen, enter the user's first and last name.
Root Menu	In the **Root Menu** field on the User Maintenance screen, press **F10** and select the menu name that determines the system programs to which the user will have access.
Branches	Use the Accessible Branches screen to identify the branches and territories for which a user can enter transactions, such as sales orders or accounts payable.
OE Views	Use the OE View Selection screen to assign order entry views and templates to a user.
Authorization Keys	Use the Authorization Key/Template Maintenance screen to assign and remove authorization keys. Authorization keys define users' permissions to access functions in the system.
Password	When you exit User Maintenance after creating a user record, the system prompts you to enter password parameters and a password for the user.

Required User Record Information Overview

When you set up a user record, certain information is required. For each user record, you must make the following assignments before a user can begin to use the system:

- Assign the branches and territories they can access to enter transactions and make inventory inquiries.
- Assign the order entry views appropriate to their job functions.
- Assign the authorization keys required for performing their job functions.

Assigning Branches to Users

Use the Accessible Branches screen to identify the branches and territories for which a user can enter transactions, such as sales orders or accounts payable. You can also designate the territory in which the user can make inventory inquiries. You can set up users to ship products out of a branch without giving them access to all information in that branch.

A user's authorization at a branch is governed by whether that branch is included in an assigned inventory inquiry territory, home territory, or is the user's home branch and by the user's authorization key assignments.

- If you assign a home branch, the user has full access to all functions at the branch, based on the user's authorization key assignments.

  To limit a user's authorization to ship material or place orders in that branch, set a flag in the **Auth** column for that branch in the lower portion of the screen.

- If you assign a home territory, the user has full access to all functions at all the branches in the territory.

  Note: You cannot limit a user's authorizations to the branches in a home territory.

- If you assign an inventory inquiry territory, the system displays data for the branches in that territory when the user makes inventory inquiries.

To assign branches to users:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Brchs** hot key to display the Accessible Branches screen.

   Note: You must be assigned the USER.BRANCH.MAINT authorization key to access and edit this screen.

4. In the **Home Branch** field, enter the user's home branch.

   The system lists the home branch in the **Branches** column. The **Auth** column is left blank, which give you full access to this branch.

5. In the **Home Territory** field, press **F10** and select the territory from which this user most commonly does business.

6. In the **Inv Inq Terr** field, enter the territory, if territories are defined, in which this user has permission to make inventory inquiries.

If you...	Then, when this user does an initial inventory inquiry...
enter a territory	information for all the branches in that territory displays.
leave the field blank	the system determines what to display in the follow sequence: • If a home territory is assigned, information for the branches in that territory displays. • If a home branch is assigned, information for that branch displays. • If a home branch is not assigned, the user cannot do an inventory inquiry in any branch.

7. By default, the **Branches** column displays the user's home branch, if one is assigned.

   Enter any of the following branches, as needed:

   - Branches within the user's home territory or inventory inquiry territory to which you want to limit the user's access.
   - Additional branches to which you want to give the user access.

   Enter additional branches by doing the following:

   - To add a branch, press **F10** to select one from the list.
   - To add all branches or all branches in a territory to the list, use the **Add Branches** hot key. At the prompt, enter the territory name or **all**.
   - To delete a branch, position the cursor on the branch and press **Alt-Delete**.
   - To delete all branches, use the **Clear All** hot key.

8. In the **Auth** column for each selected branch, do one of the following:

   - Leave the field **blank** to grant access based on the user's authorization key assignments.
   - Press **F10** and select one of the following options to limit the user's access to the branch:
     - **I-Only Inventory Inq –** The branch is accessible to this user only for inventory inquiry.
     - **S-Sales Orders/Inv Inq –** The branch is accessible to this user for inventory inquiry. The user can ship material out of this branch through sales order entry, but cannot enter orders at this branch.

9. Press **Esc** twice to save this information and update the user record.

Assigning Order Entry Views and Templates to Users

Use the OE View Selection screen to assign order entry views and templates to a user.

The sales, purchase, and transfer order entry Body screens display different columns of information, depending on the selected view. Views can show information such as unit or extended prices, product availability, shipping, or backorder details. Since not all views are appropriate for all users, assign each user the order entry (OE) views related to their job function.

OE view templates contain order entry views grouped together by function. For example, *POE.ALL contains all purchase order entry views. View IDs prefixed with an asterisk are OE view templates.

You can add custom OE views that are wider than 78 characters to a template for users who use Eterm, Solar Eclipse, or both. The users OE view selection list in Eterm includes only the views that are 78 characters or less. However, if the user is in Solar Eclipse, the user can select a view that is wider than 78 characters.

To assign order entry views and templates to a user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **OE View** hot key to display the OE View Selection screen, which lists the views and templates assigned to this user. The system prefixes template IDs with an asterisk (*).

   Note: You must be assigned the USER.VIEW.SELECT authorization key to access this screen.

4. To assign a view or template, position the cursor on a blank line, press **F10**, and select a view or template from the list.

   The system displays the view or template ID, order entry type, and description in the OE View Selection screen.

5. Use the **Template** hot key, as needed, to view or edit the views assigned to a template.
6. To designate an order entry view as the default for an order type, press **F10** in the **Dflt ID** field and select one from the list. When the user enters the selected order type, this is the default view. This field applies only to views.
7. Repeat steps 4 and 5 to add additional views or templates to the user's profile.
8. Press **Esc** until the user record has been saved.

   Note: A user to whom you have assigned a new view must log off the system and then log back on before being able to use the view.

Editing User Passwords

Use Password Maintenance to set up password parameters such as number of characters, required change days, or maximum length, or to change user passwords.

To edit a user password:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Passwd** hot key to display the Password Maintenance screen.

   The **User ID** field and **UserName** field displays the user's information from the User Maintenance screen.
4. In the **Enter New Password** field, enter a new password in lower case.

   Note: Do not use upper case characters for passwords.
5. At the prompt, re-enter the new password to verify it.
6. In the **Min Password Length** field, enter the minimum number of characters required for a password.
7. In the **Min New Characters** field, enter the minimum number of new characters required for entering a new password. New characters are letters or symbols that were not in the old password.
8. In the **Min Numeric Characters** field, enter the minimum number of numbers to include in the password. This prevents the user from creating passwords solely with letters.
9. In the **Min Alpha Characters** field, enter the minimum number of letters or symbols to include in the password. This prevents the user from entering passwords consisting solely of numbers.
10. In the **Suggest Change Every** field, enter the number of days the system recognizes the password before it displays a message suggesting that the password is changed. The user can still log onto the system without changing the password.
11. In the **Require Change Every** field, enter the number of days the system recognizes the password before it requires that the password is changed. The user can no longer log onto the system without changing the password.

    The **Last Change** field displays the number of days since the password was last changed.
12. Press **Esc** to save the changes and exit the screen.

Authorization Key Assignment Overview

Authorization keys define users' permissions to access functions in the system. Some keys have multiple levels of authority associated with them. For example, you can assign the AP.ALLOWED authorization key to give a user access to A/P Entry, in view-only mode for Level 1 or edit mode for Level 2.

The SUPERUSER authorization key, located at the bottom of the list of Available Keys, assigns the highest level of all authorizations to a user. Assign this authorization key to the system administrator only.

To grant permissions, the system administrator assigns authorization keys to user records. Use the Authorization Key/Template Maintenance screen to assign and remove authorization keys. This screen, which lists all the keys, is divided into three columns:

- **Available Keys** – Keys not assigned to the user.
- **Assigned Keys –** Keys assigned to the user.
- **Auth Level –** Assigned level of authorization, if an assigned key has levels.

Each authorization key is either available or assigned. You can move keys from one column to the next.

The system provides two shortcuts for assigning authorizations to users in your company who perform the same tasks:

- Use the prototyping function in User Maintenance, where you create a new user by copying the record and authorizations of another user.
- Create authorization key templates that represent groups of users. First assign authorization keys to templates, and then assign the appropriate templates to user IDs.

Templates display along with the authorization keys on the Authorization Key/Template Maintenance screen. You can assign multiple authorization keys and templates to a user ID.

Changes to authorization keys are not effective until the user affected by the changes re-logs into the system.

Assigning Authorization Keys to Users

Assign authorization keys to users to give them permission to access functions in the system.

When you assign users authorization keys, you can assign them individual keys or authorization templates, such as ***TP: insidesales** for all inside sales persons. You can also assign a level of authorization for keys that have more than one level. For example, use the AP.ALLOWED authorization key to allow access to A/P Entry, in view-only mode for Level 1 or edit mode for Level 2.

For some authorization keys, you must enter additional detail information. For example, for the MESSAGE.GROUP.TYPES authorization key, you need to select if they are **Personal**, **Group**, or **Global**.

To assign authorization keys to a user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Auth Keys** hot key to display the Authorization Key/Template Maintenance screen.

   The Available Keys column lists defined templates and authorization keys. Templates have a prefix of ***TP:** and appear first in the list.

   Note: You must be assigned the USER.KEY.MAINT authorization key to access this screen.

4. To assign a key or template, select the item in the **Available Keys** column and use the **Assign** hot key.

   The key or template name moves from the **Available Keys** column to the **Assigned Keys** column.

   Note: You can use the **Find** hot key to move the cursor to a designated key. At the prompt, enter all or part of the key name.

5. In the **Auth Level** field, change the assigned authorization level, as needed. The system assigns the lowest level to the user.

   Note: If you assign multiple templates to a user, make sure the authorizations in one template do not conflict with those in the others.

6. When you assign any of the following authorization keys, you must enter additional detail information:

With the assigned key selected, use the **Detail** hot key to display the Detail Selection screen. To add items to the screen, press **F10** and select from the list.

Authorization Key	Use to permit access to...
GL.ACCOUNTS	view and edit designated G/L accounts.
INVALID.PRODUCT.LINES	sell all but a few product price lines.
INVALID.VEN.TYPES	all but a few designated types of vendor records.
MESSAGE.GROUP.TYPES	view and edit designated Message Groups.
POE.SCHEDULE	set the **Sched** hot key on the POE Body screen to a default value.
SOE.CREDIT.REL.RANK	release orders for customers.
SOE.SCHEDULE	set the **Sched** hot key on the SOE Body screen to a default value.
TOE.SCHEDULE	set the **Sched** hot key on the TOE Body screen to a default value.
VALID.BLINES	edit product records in designated buy lines.
VALID.PLINES	edit product records in designated price lines.
VALID.PRODUCT.LINES	sell only a few product price lines.
VALID.VEN.TYPES	designated types of vendor records.
WIN.DIRECT.CREATE.DIR	export a report from the system using the Windows Direct Options program.

7. To remove a key or template, select the item in the **Assigned Keys** column and use the **Remove** hot key.

   The key or template name moves from the **Assigned Keys** column to the **Available Keys** column.

8. Press **Esc** to return to the User Maintenance screen.

Assigning Superuser Authorization

The SUPERUSER authorization key, located at the bottom of the list of Available Keys, assigns the highest level of all authorization keys to a user. If the SUPERUSER authorization key is assigned, almost no other keys need to be assigned. This authorization key is intended for use by users who require access to every function with maximum privilege and is reserved for system administrators, their superiors, company owners, and Eclipse personnel.

Because this authorization key gives unlimited capability within the system, assign it sparingly. We recommend that the system administrator set up one user ID with limited authorizations to use for everyday work and another ID, with superuser authorization, to use only when needed. The assigned superuser should change the password frequently.

To test a system function with a lower level of authorization, a superuser can override the default level of authorization for a designated key. To do this, assign the designated authorization key, in addition to the SUPERUSER authorization key, with the override level or the related detail information that restricts the user's actions. Any authorization key assigned in addition to the SUPERUSER authorization key overrides the superuser level of authorization for that key.

To assign superuser authorization:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display their record.
3. Use the **Auth Keys** hot key to display the Authorization Key/Template Maintenance screen.
4. In the Available Keys column, position the cursor on the SUPERUSER authorization key and use the **Assign** hot key.

   The key moves from the **Available Keys** column to the **Assigned Keys** column. The system assigns the highest level of authorization for almost all authorization keys.
5. The following authorization keys limit a user's access and require that additional information be specified when they are assigned, using the **Detail** hot key.

   When you assign the SUPERUSER authorization key, the following authorization keys are not included in the superuser's authorization.

Authorization Key	When this key is not assigned...
AP.SIGNATURE.PRINT	the user cannot print an imaged signature on checks.
GL.ACCOUNTS	the user can access all G/L accounts.
INVALID.PRODUCT.LINES	no product lines are invalid.
INVALID.VEN.TYPES	no vendor types are invalid.
MESSAGE.GROUP.TYPES	the user can access all message group types.
POE.SCHEDULE	the system does not set the **Sched** hot key on the POE Body screen to a default value.

Authorization Key	When this key is not assigned...
SOE.CREDIT.REL.RANK	the user can release orders for any customer, based on the user's level assignment in the SOE.CREDIT.RELEASE authorization key.
SOE.SCHEDULE	the system does not set the **Sched** hot key on the SOE Body screen to a default value.
TOE.SCHEDULE	the system does not set the **Sched** hot key on the TOE Body screen to a default value.
VALID.BLINES	all buy lines are valid.
VALID.PLINES	all price lines are valid.
VALID.PRODUCT.LINES	all product lines are valid.
VALID.VEN.TYPES	all vendor types are valid.
WIN.DIRECT.CREATE.DIR	the user cannot export a report from the system using the Windows Direct Options program.

6. Press **Esc** to return to the User Maintenance screen.

   Note: Changes to authorization keys are not effective until the user affected by the changes logs off and then logs back on.

Creating Authorization Key Templates

An authorization key template is a group of user authorization keys that specifies the permissions required for a designated job function. When multiple users perform the same tasks in your company, create a template for that job function and then assign the template to each user. For example, you can create and assign one authorization key template for counter salespeople and another template for accounts payable personnel.

To create an authorization key template:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Auth Keys** hot key to display the Authorization Key/Template Maintenance screen.

   The **Available Keys** column lists defined templates and authorization keys. Templates are at the top of the list and have a prefix of *TP.
4. Move the cursor to a line that does not begin with an asterisk (*) and use the **Template** hot key to display the Authorization Key/Template Maintenance screen.
5. In the **Template** field, type the word **new** and press **Enter**, and then enter the new template ID to display the list of available authorization keys.

   You can assign authorization keys to the template now or you can create the template without assigning keys to it. To assign keys to it later, skip to step 8.

   Note: You can also create a template by copying and then editing an existing template.
6. To assign an authorization key to the template, select it in the **Available Keys** column and use the **Assign** hot key.

   The key name moves from the **Available Keys** column to the **Assigned Keys** column. If authorization levels are associated with the key, the system assigns the lowest level to the user, but you can change it.
7. To remove an authorization key, select it in the Assigned Keys column and use the **Remove** hot key.

   The key name moves from the **Assigned Keys** column to the **Available Keys** column.
8. Press **Esc** to save the template and return to the Authorization Key/Template Maintenance screen for the User ID.

   The system prefixes the new template ID with *TP: and displays with the other template IDs at the top of the **Available Keys** column.

Copying Authorization Key Templates

An alternative way to create authorization key templates is to copy and then edit existing templates. For example, you can copy an authorization key template for accounts payable personnel and then edit the new template with additional authorizations for accounts payable supervisors.

To copy an authorization key template:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Auth Keys** hot key to display the Authorization Key/Template Maintenance screen.

   The **Available Keys** column lists defined templates and authorization keys. Templates are at the top of the list and have a prefix of *TP.
4. Position the cursor on the template to copy and use the **Template** hot key to display the template in the Authorization Key/Template Maintenance screen.
5. Use the **Copy** hot key.
6. At the **Enter Template** prompt, enter a new name for the copied template.

   The system makes the copy and then displays the original template.
7. Press **Esc** to exit the original template and return to the list of templates on the Authorization Key/Template Maintenance screen.

   The system prefixes the new template ID with *TP: and displays it with the other template IDs at the top of the **Available Keys** column.
8. Select the new template name and use the **Template** hot key to display the template in the Authorization Key/Template Maintenance screen. Authorization keys assigned to the template display in the **Assigned Keys** column.
9. Edit the template as follows:
   - To assign an authorization key to the template, select it in the **Available Keys** column and use the **Assign** hot key.

     The key name moves from the **Available Keys** column to the **Assigned Keys** column. If authorization levels are associated with the key, the system assigns the lowest level to the user, but you can change it, if needed.
   - To remove an authorization key, select it in the **Assigned Keys** column and use the **Remove** hot key.

     The key name moves from the **Assigned Keys** column to the **Available Keys** column.

10. Press **Esc** to save the template and return to the Authorization Key/Template Maintenance screen for the user ID.

Editing Authorization Key Templates

The Eclipse system ships with pre-defined templates that contain authorization keys associated with common job types.

The following authorization key templates might be provided:

Template	Is designed for...
***TP:AR/AP**	accounts receivable and accounts payable personnel.
***TP: MGR**	managers.
***TP:SALES**	inside and outside salespeople.

You can modify these templates and create others as needed. The system prefaces templates with *TP: and all templates display at the beginning of the Available Keys list on the Authorization Key/Template Maintenance screen.

To edit authorization key templates:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Auth Keys** hot key to display the Authorization Key/Template Maintenance screen.

   The **Available Keys** column lists defined templates and authorization keys.
4. Position the cursor on the template to edit and use the **Template** hot key. To display the Authorization Key/Template Maintenance screen. Authorization keys assigned to the template display in the **Assigned Keys** column.
5. To assign an authorization key to the template, select it in the **Available Keys** column and use the **Assign** hot key.

   The key name moves from the **Available Keys** column to the **Assigned Keys** column. If authorization levels are associated with the key, the system assigns the lowest level to the user, but you can change it, if needed.
6. To remove an authorization key, select it in the **Assigned Keys** column and use the **Remove** hot key.

   The key name moves from the **Assigned Keys** column to the **Available Keys** column.
7. Press **Esc** to save the template and return to the Authorization Key/Template Maintenance screen for the user ID.

Deleting Authorization Key Templates

If you do not need an authorization key template, you can delete it. If you delete a template that is assigned to a user, that user will lose the authorization keys contained in that template.

To delete an authorization key template:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Auth Keys** hot key to display the Authorization Key/Template Maintenance screen.

   The **Available Keys** column lists defined templates and authorization keys. Templates are at the top of the list and have a prefix of *TP.
4. Position the cursor on the template to delete and use the **Template** hot key to display the Authorization Key/Template Maintenance screen. Authorization keys assigned to the template display in the **Assigned Keys** column.
5. Use the **Delete** hot key. The system prompts you to confirm the deletion.

   The Authorization Key/Template Maintenance screen for the user ID displays and the deleted template no longer displays in the **Available Keys** column.

Additional User Record Information Overview

Once you have defined the general user defaults on the User Maintenance screen, use the screen's hot keys to define defaults for special functions.

For example: You may need to assign GP% control parameters to users in sales, to limit the amount by which they can override sales prices. You may also want to assign authorization passwords to the managers in sales so that they can make pricing adjustments.

If your company uses any of the following companion products, you need to set user defaults:

- **Document Imaging –** Assign a default document imaging profiles to users.
- **Outbound E-mail –** Set up default information to populate the Send E-mail screen whenever users send e-mail messages from the system.
- **RF Warehouse Management –** Define users' pick groups.
- **Eclipse Information System (EIS) –** Define the business areas for which users can generate graphs.
- **Time Clock –** Set user options, such as whether the system should clock users out after a certain time of day.

For customer, vendors, or contacts for whom you have defined user records, you need to link these user records with the correct customer, vendor, or contact record. Set additional user defaults for the message system, printers, territory assignments, job queues, and scheduler. In addition, you can set user defaults for users who access Solar Eclipse to perform their job functions.

Assigning Gross Profit Percent Control Parameters to Users

Use the gross profit percent (GP%) control parameters to limit the amount by which a user can override sales prices. The user must be authorized to edit prices and costs on sales orders. You can define a minimum gross profit percentage and a maximum discount from the standard price allowed for stock and direct items. If the user makes a change that exceeds the limit, a warning message displays.

> **Note:** The Base Minimum GP% Price Check Off COMM-COST control maintenance record determines whether you base the minimum GP% price check off COMM-COST or COGS cost.

Minimum Gross Profit Percentage

The system uses the minimum gross profit percentage to prevent users from selling products for less than a designated minimum.

You can assign a minimum required GP% at the following levels:

- Order
- Product
- Price Line
- User

When the user makes a change that affects the GP% for an item in sales order entry, the system looks for a specified minimum, in the sequence listed above. The system stops checking once it finds one setting for minimum GP%, and does not check subsequent settings. If the new GP% falls below the first detected minimum, the system displays a warning that identifies the parameter (product, price line, user) affected by the change and what the minimum GP% for that level is. To override the warning, the user must be assigned the SOE.MIN.GP authorization key.

Maximum Discount from Standard Price

The system uses the maximum discount from standard price to prevent users from discounting the price of a product more than a designated maximum.

When the user makes a price change that affects the discount from the standard price for an item in sales order entry, the system compares the new discount to the maximum specified in this field. If the new discount is greater than the maximum, the system displays a warning that the new sales price exceeds the maximum percentage the user is allowed to discount from the standard sales price. To override the warning, the user must be assigned the SOE.MIN.GP authorization key.

To assign GP% control parameters to users:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.

2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **GP Control** hot key to display the GP% Control Parameters screen.
4. In the **Min GP% Required** field, enter the minimum gross profit percentage that this user can specify on an order for stock and direct items.
5. In the **Max Disc from Standard Price** field, enter the maximum discount on the standard price that this user can specify on an order for stock and direct items.
6. Press **Esc** two times to save this information and exit User Maintenance.

Assigning Languages to Users

Use the User Languages Selection screen to designate the languages in which this user can work.

The user's default language is the first language in the list. If you leave this field blank, the default is English.

To assign languages to a user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **Languages** hot key to display the User Languages Selection screen.
5. Do the following, as needed:
    - To add a language, position the cursor on a blank line, press **F10**, and select a language.
    - To delete a language, position the cursor on the language and press **Alt-Delete**.
6. Press **Esc** three times to save this information and exit User Maintenance.

Assigning Maintenance Users to User IDs

You can create user IDs that represent groups. For example, you might have a user ID called INFOREQ, to whom people in your company can submit trackers requesting information.

When you have a user ID that represents a group, you need to designate other users to monitor the user job queue for this ID and respond to the trackers in the queue. Use the Maintenance User Selection screen to identify the additional users authorized to maintain a user record that represents a group, and respond to and close trackers that require final action by this user ID.

To assign maintenance users to a user ID:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Press the **Addl** hot key and then the **Job Queue** hot key to display the User Job Queue/Tracker Settings screen.
4. Use the **Maint Users** hot key to display the Maintenance User Selection screen.
5. In the **User ID** column, enter the maintenance users for the group user ID.
   - To add a user to the list, position the cursor on a blank line and enter the user ID.
   - To remove a user from the list, position the cursor on the user to remove and press **Alt-Delete**.
6. In the **Append Name** column for each maintenance user, select how the system describes the appends the maintenance user makes to trackers in the job queue.
   - **Group ID –** Displays the group user ID.
   - **User ID –** Displays the maintenance user ID. This is the default.
   - **Group & User ID –** Displays the group user ID followed by the maintenance user ID in parentheses.
7. Press **Esc** four times to exit screens and update the user record.

Assigning Printer Locations to Users

A printer location is a group of printers accessible to your terminal. Printer locations are assigned to terminals, users, and physical branches. The following procedure describes how to assign printer locations to user IDs.

When you log on, the printer location displayed at the bottom of your screen is the printer location assigned to your terminal. If no printer location is defined for the terminal, the system prompts you to select from the locations assigned to your user record. If no printer locations are assigned at the user level, the system prompts you to select from the locations assigned to the physical branch in which the terminal is located. Once a printer location is selected, you can also change it.

To assign printer locations to a user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Location** hot key to display the Locations screen.
4. For each printer location, position the cursor on a blank line, press **F10** and select a location from the list.

   Note: Enter the locations in the order in which you want them to appear when the system displays a list of printer locations.

5. Press **Esc** twice to save this information and exit User Maintenance.

Assigning Users to EIS Groups

The Eclipse Information System (EIS) is a companion product that management can use to display selected business data in graphical format. EIS groups, such as Sales and Purchases, define the business areas for which a user can generate graphs.

If your company uses the Eclipse Information System, you need to assign EIS groups to users. Users can only generate graphical information for the groups assigned to their ID. Users with no groups assigned, cannot access the EIS application.

To assign users to EIS groups:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **EIS Groups** hot key to display the EIS Groups Selection screen.
5. Do the following, as needed:
   - To add a group, position the cursor on a blank line, press **F10**, and select a group.
   - To delete a group, position the cursor on the group and press **Alt-Delete**.
6. Press **Esc** three times to save the updated user record and exit User Maintenance.

Assigning Users to Message Groups

You can use message groups to send the same message to all members of a group at the same time. You create a message group by giving it an ID and assigning user IDs to the group. Users can belong to more than one message group.

From User Maintenance you can:

- Assign users to message groups for which they have authorization.
- Remove users from message groups.

To assign users to message groups:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **Msg Groups** hot key to display the Message Groups Selection screen.

   The screen displays a list of message groups to which the user belongs. Personal message groups are indicated by a (P) following the ID.
5. Do the following, as needed:
   - To add the user to a new group, position the cursor on a blank line, press **F10**, and select a group.

   Note: If the user is assigned the MESSAGE.GROUP.TYPES authorization key, the **F10** list contains only those groups for which the user is authorized.

   - To remove the user from a group, position the cursor on the group and press **Alt-Delete**.
6. Press **Esc** three times to update the user record and exit User Maintenance.

Creating Authorization Passwords for Users

Managers can create one-time or multiple-use authorization passwords to enable other users to complete authorization-protected tasks on an as-needed basis. This allows for greater security and auditing capability since managers no longer have to share their personal passwords. It also increases productivity since a manager no longer needs to be at a workstation to authorize specific tasks.

For example, only authorized users can approve pricing adjustments that exceed defined limits. Typically these users are in management positions. When a non-authorized user enters a pricing adjustment in order entry that exceeds the designated limits, the system displays the following prompt: Enter Authorized Password.

Two ways to respond to this prompt are:

- Authorized users can enter their Eclipse password at the prompt. For example, an authorized manager walks over to the order taker's terminal and enters the manager's Eclipse password.
- Authorized users can create *authorization passwords*, which they can tell another user to enter on their behalf. The user requesting the override enters the authorization password at the prompt. This eliminates the need for a manager to walk over to the other user's terminal to respond to the prompt.

To create authorization passwords, managers must be assigned the AUTH.PWD.MAINT authorization key. They can create one-time or multiple-use passwords, depending on the level assigned to the key.

Every time a user enters an authorization password at the **Enter Authorized Password** prompt, the system sends a message to the user who created the password. The message describes the password, who used it, and the reason for using it.

- If the message is for a one-time password, it also indicates that the password is now expired.
- When the system determines that a multiple-use password has expired, it sends a message to the user who created it.

To create authorization passwords for users:

1. Do one of the following to display the Authorization Passwords screen:
    - From the **System** > **System Files** > **User Control** menu, select **Authorization Password Maintenance**.
    - From the User Maintenance screen, use the **Add'l** hot key and then the **Auth Pswds** hot key.
2. In the **Login Password** field, enter the user's system password to access the password definition part of the screen.

3. In the **Password** field, enter a password. The system populates the remaining columns as follows:

If your authorization level is...	Then the password is set for...
0	one-time use. You cannot change this setting. The system deletes the password from the list after the first use.
1-998	multiple use for the number of days equal to the level number. If you change the date, it cannot be later than the system-generated date or earlier than the current date. The system deletes the password from the list following the expiration date.
999	multiple use with no expiration date. The password is available for use until you remove it from the list.

4. To allow the password to be used just once, set the value in the **One Time** field to **Y**.
5. To allow the password to be used multiple times for a limited period, enter an expiration date in the **Expire Date** field. This field does not apply if the password is set up for one-time use.
6. To set up additional authorization passwords, repeat steps 3 through 5.
7. Press **Esc** three times to update the user record and exit User Maintenance.

Defining Authorized Territories for Users

Territories are groups of branches you define in Territory Maintenance. Companies generally use territories for inquiry and reporting purposes. Users can have different levels of access to territories. You can authorize some users to use territories only for reporting purposes and others to view and edit the branches assigned to the territories.

The Rebuild Authorized Territory Lists utility generates default lists of authorized territories for users and the parameters used to define the territories, based on the users' assigned branches. Each user has three types of authorized territories: reporting, viewable, and editable.

Use the Authorized Territories screen in User Maintenance to view users' default lists and to override the defaults, if necessary.

To define authorized territories for users:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Terrs** hot key to display the Authorized Territories screen.

   Note: You must be assigned the USER.TERR.MAINT authorization key to access this screen.

4. In the **Type** field, enter one of the following to define the level of viewing allowed to this user:
   - **Reporting –** Territories for which the user can run reports. The default list of reporting territories displayed for a user includes every territory in which the user has an accessible branch. Any territory can be included in the reporting list. When running a report for a territory, only information for branches to which the user has access within the territory is included in the report.

     We recommend that you do not change the default list of reporting territories. Let the Rebuild Authorized Territory Lists utility maintain this list.
   - **Viewable –** Territories whose data the user can see in view-only mode. The default list of viewable territories displayed for a user includes every territory in which the user has an assigned branch. A territory must have an entity priority or product priority defined on the Territory Maintenance screen to be included in the viewable list.
   - **Editable –** Territories whose data the user can edit. The default list of editable territories displayed for a user includes only those territories in which every branch is assigned to the user. A territory assigned to the editable list overrides a user's accessible branches. Even if the user does not have access to all branches in the listed territory, the user can change the settings for the territory. A territory must have an entity priority or product priority defined for it on the Territory Maintenance screen to be included in the editable list.

Note: The ALL territory is a universal territory created as part of the Eclipse system, and is used to maintain branch settings throughout the system. The ALL territory follows the rules listed above, based on your accessible branches.

Steps 5 and 6 apply to the type selected in this step. You can modify only one territory type at a time. You can assign each territory to multiple authorized territory types.

5. In the **Override Automatic Build** field, enter one of the following to determine whether the territory list is updated when the Rebuild Authorized Territory Lists utility runs:
   - **Y –** Prevent the list of territories defined for the selected territory type from being updated.
   - **N –** Allows the list of territories defined for the selected territory type to be updated.
6. In the **Authorized for All Terrs** field, enter one of the following to determine whether the user is authorized for all territories for the selected territory type:
   - **Y –** The user is authorized for all territories.
   - **N –** The user is not authorized for all territories.

   The following table describes the results of running the Rebuild Authorized Territory Lists utility and your settings in this field, combined with those in the **Override Automatic Build** field.

For territory type...	Enter...	To...
Viewable	**Y**	allow the user to view all territory information on any screen. After running the Rebuild Authorized Territory Lists utility, the system updates the territory list for the user's authorized territories.
	N	not allow the user to view any territory information on any screen. This setting removes all territories from the users list.
Editable	**Y**	allow the user to edit all territory information on any screen. After running the Rebuild Authorized Territory Lists utility, the system updates the territory list for the user's authorized territories, and if the user's setting in the **Override Automatic Build** field is: • **N**, the system changes the **Y** setting to **N**. You must be fully authorized to edit all territories to maintain the **Y** setting in this field. • **Y**, the user can edit all territories, even if they are not authorized for all branches within all territories.

For territory type...	Enter...	To...
	N	not allow the user to edit any territory information on any screen. This setting removes all territories from the user's list. After running the Rebuild Authorized Territory Lists utility, the system does not update the territory, and if the user's setting in the **Override Automatic Build** field is: • **N**, an authorized user must set the user's **Authorized for All Terrs** field for their authorized territories to be updated after the run. • **Y**, new territories will never get updated for that user, even if the user is authorized for all branches within that territory. We do not recommend this combination of settings.

7. Repeat steps 4 through 6 to set up the user for each territory type.
8. Press **Esc** twice to update the user record and exit User Maintenance.

Defining Palm Product Download Parameters for Users

The system filters the buy lines and price lines users can download to their Palm devices for placing orders using Pocket OE.

The Valid Palm Buy Line Product Download and Valid Palm Price Line Product Download control maintenance records define system-level defaults. You can override the system-level defaults by defining user-specific product download parameters.

The system only downloads to the Palm device products assigned to the buy lines and price lines defined for a user. If no price or buy lines are defined at the user level, the system downloads products assigned to the buy lines and price lines defined in the control maintenance records.

To define Palm product download parameters for a user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **Palm** hot key to display the Palm User Maintenance screen.
5. In the **Product Price Lines to Download** field, press **F10** and select the price line this user can download to their Palm device. To specify multiple price lines, use the **Multi** hot key.
6. In the **Product Buy Lines to Download** field, press **F10** and select the buy line this user can download to their Palm device. To specify multiple buy lines, use the **Multi** hot key.
7. In the **Product Availability Branch** field, press **F10** and select the branches or territory for which to download product availability for this user.

   When the user syncs their Palm device, the product availability downloaded to the reorder pad is a cumulative tally of the product's availability for each branch entered in this field. If you leave this field blank, the system downloads availability for the user's home branch. Wireless Pocket Order Entry attempts to download availability for the pricing branch entered in the Real Time Preferences screen. If the **Pricing** branch is blank, the wireless palm functionality downloads availability for the user's home branch.

   When the user requests a wireless price update, the palm device displays the availability at each branch and a total cumulative tally.
8. Press **Esc** three times to save the updated user record and exit User Maintenance.

Defining User Defaults for Solar Eclipse

If your company uses the Solar Eclipse graphical user interface, access the Solar Eclipse User Maintenance screen to define additional defaults for the user. For example, Solar Eclipse can play different tunes that identify the types of messages you receive.

To define user defaults for Solar Eclipse:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **Solar** hot key to display the Solar Eclipse User Maintenance screen.
5. In the **Solar Main Menu** field, press **F10** to display a list of Solar Eclipse menus, and select the default main menu to display for this user. If you leave this field blank, the system displays the user's root menu defined on the User Maintenance screen.
6. In the **Custom Toolbar Template** field, select the user's default template for the user-defined toolbar.
7. In the **Max # of Connections** field, enter the maximum number of connections that the system should allocate to this user at any given point in time.
8. In the **Message** field, press **F10** and select the tune to play in Solar Eclipse when the user receives a message.
9. In the **Job Queues** field, press **F10** and select the tune to play in Solar Eclipse when the user receives a tracker in their job queue.
10. In the **Reports** field, press **F10** and select the tune to play in Solar Eclipse when the user receives a report that the Hold file forwarded.
11. Press **Esc** three times to save the updated user record and exit User Maintenance.

Defining User-Specific Messages for Faxed Orders

If defined, the system can display a user-specific message on the cover sheet when a user faxes an order.

To define user-specific messages for faxed orders:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **Fax Message** hot key to display the Fax Default Message for Order Entry screen.
5. Type the message that the system displays on the cover sheet of all faxed orders this user creates.
6. Press **Esc** three times to save the updated user record and exit User Maintenance.

Entering Additional User Settings

Use the Additional User Settings screen to specify additional user defaults related to the Message System. For example, you can specify the screen that displays when you press **Ctrl-F8** and the maximum number of messages to store for the user.

To enter additional user settings:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **Addl Data** hot key to display the Additional User Settings screen.
5. In the **Message Hotkey Default** field, press **F10** and select whether **Ctrl-F8** displays the Received Messages screen or the Message Dialog screen.
   - **R-Review –** Displays the Received Messages screen.
   - **D-Dialog –** Displays the Message Dialog screen. This is the default value.
6. In the **Maximum Number of Messages** field, enter the maximum number of messages to keep in the message system for this user. When the number of messages reaches the maximum, the system deletes the oldest messages as new messages arrive.
7. In the **New Message Notification** field, press **F10** and select how the system notifies this user each time the user receives a new message:
   - **Scrolling Notification –** The newest received message scrolls across the bottom of the screen until the user accesses the Message System and views the received messages. This is the default method.
   - **Single Notification –** The following notification message displays at the bottom of the screen: x New Message Waiting, where x indicates the number of received messages the user has not yet viewed. This message displays until the user accesses the Message System and views the received messages.
   - **No Notification –** The system never displays any message notification at the bottom of the screen.
8. Press **Esc** three times to save the updated user record.

Entering User Expense Check Information

Use the User Expense Maintenance screen to designate the payee name for expense checks for this user and the IDs of users authorized to sign off on the expense. The payee must be set up as a vendor record.

To enter user expense check information:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **Expense** hot key to display the User Expense Maintenance screen.
5. In the **Pay To** field, enter the name of the vendor to display on expense checks for this user.
6. In the **Signoff** fields, enter up to four IDs of users who must authorize this user's expenses before the system can create an expense check for the user.
7. Press **Esc** three times to save the updated user record.

Entering User Imaging Parameters

If your company uses the Eclipse Document Imaging companion product, you can assign default document imaging profiles to users for attaching documents to records in the system. Document profiles define storage paths and how the system indexes the images using that profile.

To enter user imaging parameters:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **Imaging** hot key to display the User Imaging screen.
5. In the **Default Imaging profile** field, enter the default document imaging profile for this user.
6. Press **Esc** three times to save the updated user record.

Setting User Outgoing E-mail Parameters

Use the Outgoing E-mail Parameters screen to set up default information with which to populate the Send E-mail screen whenever this user sends an e-mail message from the system. These defaults identify the e-mail address of the person sending the message and, if needed, the e-mail address that receives a blind carbon copy of the message sent.

This feature is available only if you use the Outbound E-mail Commerce companion product.

To set user outgoing e-mail parameters:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Add'l** hot key to display the Additional Data screen.
4. Use the **E-Mail** hot key to display the Outgoing E-mail Parameters screen.
5. In the **E-mail** field, do one of the following:
   - To have the system populate the **From** field on the Send E-mail screen with the user's ID and company domain name, leave the field blank. For example, the system populates the field with **userID@eclispedistributor.com**.
   - If it is different from the default generated by the system, enter the user's e-mail address in this field.
6. If the user wants to receive a blind carbon copy of each e-mail the user sends, enter the user's e-mail address in the **Sender BCC** field.
7. To append an identifying prefix to the Subject line of the blind carbon copy e-mail, enter the prefix in the **Sender BCC Subject Prefix** field.
8. In the **Forward Messages to E-mail** field, if you are runing the Eclipse Integration with Microsoft Outlook companion product and you want this user to receive system messages and tracker appends in their e-mail inbox, set thi field to **Yes**.

   Use this feature if this user is frequently logged out of Eclipse but still needs to receive information for the trackers for which they are on the forward list, as well as system message communications.
9. Press **Esc** three times to save the updated user record.

Entering User Phantom Maintenance Parameters

Use the User Phantom Maintenance to set user-level controls on the number of phantom processes this user can be running or queued at any given point in time.

When a user initiates a phantom process and the system or user thresholds have been reached, the system queues the phantom process. The process waits until resources become available to continue execution. To maintain system stability, you can also set a limit on the number of processes that can be queued.

> **Note:** See Controlling the Number of Phantoms Running to set system-level controls.

To enter user phantom maintenance parameters:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Add'l** hot key to display the Additional Data screen.
4. Use the **Phantom** hot key to display the User Phantom Maintenance screen.
5. In the **Maximum Number of Running Phantoms** field, enter the maximum numbers of phantom processes this user can have running at one time.
6. In the **Maximum Number Of Queued Phantoms** field, enter the maximum number of phantom processes this user can have queued at one time.
7. Press **Esc** three times to save the updated user record.

Entering User Scheduler Parameters

The scheduler maintains calendars of scheduled events and tasks for users. Each user can use the scheduler to organize and track events. In addition, the user can use the scheduler to determine where other users are working and when they are available for meetings.

Use the Scheduler Parameters screen to enter default scheduler information for users. For example, you can display users' standard office hours in their schedule and determine when the system should prompt them to enter a day's schedule.

You can also use this screen to designate a user ID as a scheduling location, such as a conference room.

To enter user scheduler parameters:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **Addl** hot key to display the Additional Data screen.
4. Use the **Scheduler** hot key to display the Scheduler Parameters screen.
5. If the user works the standard office hours set up for your company and a template user ID has been set up with those hours scheduled, in the **Merge Schedule With Template User** field, enter the template ID to copy the schedule set up for that ID into this user's schedule.

   Note: The system copies all events with the Available and Busy statuses defined for the template user to this user's record.

6. In the **Prompt for Schedule on Login** field, indicate whether to prompt this user to make an entry in the Daily Planner or their Daily Schedule when they log in. If you leave this field blank, the default is **Empty**.

   The option specified in the Check Scheduler On Login control maintenance record determines the type of prompt that displays. If the **No Schedule Prompting** field is flagged on the User Maintenance screen, the system ignores the setting in this field.

   Select from the following choices:

If this field is set to...	And the Check Scheduler on Login control maintenance record is set to...	Then the system...
Empty	No Check	never prompts the user.
	Daily Planner	prompts the user to enter the day's schedule if the Daily Planner for that day is empty. To exit the prompt, the user must enter a comment describing the day's schedule.

If this field is set to...	And the Check Scheduler on Login control maintenance record is set to...	Then the system...
	Daily Scheduler	displays the Daily Schedule screen if no one has scheduled events for that day. To exit the screen, the user must schedule at least one event.
Always	No Check	never prompts the user.
	Daily Planner	always prompts the user to enter the day's schedule. To exit the prompt, the user must enter a comment describing the day's schedule.
	Daily Scheduler	always displays the Daily Schedule screen. To exit the screen, the user must schedule at least one event.
Never	No Check	never prompts the user.
	Daily Planner	never prompts the user.
	Daily Scheduler	never prompts the user.

7. In the **Prompt for Schedule on Logout** field, enter one of the following to indicate whether the system should prompt this user to enter the day's schedule in the Daily Planner when they log out.
   - **Empty –** Prompts the user to enter the day's schedule if the Daily Planner for that day is empty.
   - **Always –** Always prompts the user to enter the day's schedule.
   - **Never –** Never prompts the user to create an entry in the Daily Planner. This is the default value.

   Note: The setting in this field applies only if the Check Scheduler On Login control maintenance record is set to Daily Planner. If the **No Schedule Prompting** field is flagged on the User Maintenance screen, the system ignores the setting in this field.

8. In the **Default Schedule Alarm Time** field, enter the default amount of time in minutes, hours, or days that the scheduler alerts the user before scheduled events. After entering the amount, press **F10** and select the unit of time. You can also select the **Disabled** option.
9. In the **Location User** field, indicate whether this user is a scheduler location, such a conference room.
   - **Y –** The user is a scheduler location. The system displays this user in the **F10** list for the **Location** field on the Schedule Detail Maintenance screen.
   - **N –** The user is not a scheduler location.

10. In the **Prompt for Closing Notes** field, indicate whether you want the system to display the Closing Notes screen whenever this user marks an event as completed.
    - **Y –** Displays the Closing Notes screen.
    - **N –** Does not display the Closing Notes screen.

    Note: A value entered in this field overrides the setting in the **Prompt For Scheduler Closing Notes** control maintenance record. If left blank, the control record determines whether the closing notes screen displays.

11. In the **Allow Outlook to Control Schedule** field, enter **Y** if you are using Eclipse Outlook Integration and want your schedule in Eclipse to contain the appointments that are in your Microsoft Outlook calendar.
12. Press **Esc** three times to save the updated user record and exit User Maintenance.

Entering User Warehouse Options

A large warehouse operation can be divided into zones. Pickers, who select items from the shelves to fill orders, can belong to pick groups associated with each zone. For example, you might have a pick group **W** for the warehouse and pick group **Y** for the yard. When the warehouse picker selects orders to pick, the system prompts for the pick group. If the picker enters **W**, only those picks from the **W** area display.

If a user always picks in the same location, you can specify a default pick group for the user. This default displays on the picker's terminal without prompting the user.

To enter user warehouse options:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Press the **Addl** hot key to display the Additional Data screen.
4. Use the **Warehouse** hot key to display the User Warehouse Options screen.
5. In the **Pick Group Default** field, do one of the following:
   - Enter the default pick group to display for this user when the user logs into RF Picking.
   - Enter **ALL** to display all pick groups when the user logs into RF Picking.
6. In the **Location Maintenance View** field, press **F10** to select the user's default view on the Product Location Maintenance screen.
7. In the **Display Warning if Receiving in Incorrect Branch** field, select whether the system displays a warning when a user displays a purchase order or stock receipt whose receiving branch does not match the branch from which the user is working.
   - **Never –** Does not display a warning.
   - **Both –** Displays a warning from purchase order entry and stock receipts.
   - **POE –** Displays a warning from purchase order entry.
   - **Stock Receipts –** Displays a warning from stock receipts.

   Note: The setting in this field does not restrict the user from editing or receiving the purchase order, regardless of what the receive branch of the purchase order may be.
8. Press **Esc** three times to save the updated user record.

Linking User Records to Customer, Vendor or Contact Records

Users are the people who use the Eclipse system. The system stores a record for each user in User Maintenance. In some cases, users may also be customers, contacts, and vendors. When this occurs, you must first create a record in the system for each type of user and then attach the name on that record to the user's maintenance record. For example:

- For a user to purchase items from your company, the user must have a record in Customer Maintenance.
- For a user to submit bills or expense reports to your company, the user must have a record in Vendor Maintenance.
- To store address, phone and fax number information for a user, the user must have a record in Contact Maintenance.

From User Maintenance, you can then access the User Entity Data screen to link a user to their corresponding customer, contact or vendor record.

To link user records to customer, vendor, or contact records:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Press the **Addl** hot key to display the Additional Data screen.
4. Use the **Entity Data** hot key to display the User Entity Data screen.
5. Enter the name of the **Customer**, **Contact**, or **Vendor** with which this user is associated.
6. Press **Esc** three times to save the updated user record and exit User Maintenance.

Setting User Job Queue and Tracker Defaults

Use the User Job Queue/Tracker Settings screen to:

- Designate default information for populating the Call Tracking System screen when the user creates a tracker.
- Identify additional users authorized to maintain this user record and close trackers that require final action by this user ID. This is useful when the user is set up for a queue, such as REQUESTS, and is monitored by other authorized users.
- Create a list of job queue statuses available for this user ID in addition to the **User Job Queue Statuses** defined in Control Maintenance. Users can use these personal lists to organize their job queues using their own statuses.

To set user job queue and tracker defaults:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Press the **Addl** hot key to display the Additional Data screen.
4. Use the **Job Queue** hot key to display the User Job Queue/Tracker Settings screen.
5. Complete the following fields to designate default values for the Call Tracking System screen when this user creates a new tracker:

Field	Description
Category	Press **F10** and select the default category to which trackers created by this user are assigned. The selected category determines the values available to the **Work Area** and **Sub Area** fields on the Call Tracking System screen.
Source	Press **F10** and select the default source that displays in the **Source** field.
Priority	Press **F10** and select the default priority that displays in the **Priority** field.
Ext Status	Press **F10** and select the default external status that displays in the **Ext Status** field. The system default status is **Newitem**.
Int Status	Press **F10** and select the default internal status that displays in the **Int Status** field. The system default status is **Newitem**.
Int Stage	For internal Eclipse use only. Enter the default process flow stage the system uses when a supervisor assigns this user to a tracker.
Initial Entry	Press **F10** and select whether to position the cursor on a new tracker's Call Tracking Entry screen on the **Category** or **Sub Area** field. **Note:** If you specify a default value for the **Category** field, then position the cursor on the **Sub Area** field.

6. In the **Display Options** field, press **F10** and select one of the following default views for this user's User Job Queue Viewing screen:
   - Original Comment
   - Release Notes
   - Keywords
   - Problem Solution
7. If the displayed user is set up as a queue, in the **Limit Access to Maint Users** field, indicate whether to allow only the maintenance users defined for this ID to perform maintenance tasks.
   - **Y –** Only maintenance users can perform the following tasks:
     - Add or delete this ID from the forwarding list.
     - View the User Job Queue for this user ID.
     - Change the followup status on that queue.
   - **N –** Any user can perform maintenance tasks. This is the default.
8. To assign maintenance users, use the **Maint Users** hot key.
9. In the **Append View Options** field, press **F10** and select the type of appends this user can view. If left blank, the user can view all appends.
10. In the **Send Tracker Message on Update/Addition by Owner** field, press **F10** and select one of the following to determine when the system sends a message to users on the forward list if the tracker owner updates the tracker:
    - **Never –** Never send a message.
    - **New –** Send a message only when the tracker owner appends a new comment.
    - **All –** Send a message whenever the tracker owner updates a previous comment or appends a new comment.
11. In the **Valid Sources** field, enter a list of sources this user can enter in the **Source** field on the Call Tracking System screen, indicating where the tracker originated.
12. To create a list of job queue statuses for this user ID, use the **Statuses** hot key.

    The user can then assign these statuses to trackers in the user's job queue. The user can then use the statuses listed here in addition to the Valid User Job Queue Statuses defined in Control Maintenance.

    Do either of the following:
    - To add a status to the list, position the cursor on a blank line and type the status.
    - To remove a status from the list, position the cursor on the status to remove and press **Alt-Delete**.

Note: When you sort your User Job Queue by status, the trackers status groups display in the same order in which you enter them on this screen.

13. Press **Esc** three times to save the updated user record and exit User Maintenance.

    Note: The **Project Stages** hot key is for Eclipse internal use only.

Printer System Overview

Use the printer system programs to set up and manage the printers connected to the system. After assigning printers to your system, you need to define printer locations and identity the printers in each location. You can determine the printers available to each user's terminal by assigning printer locations to users.

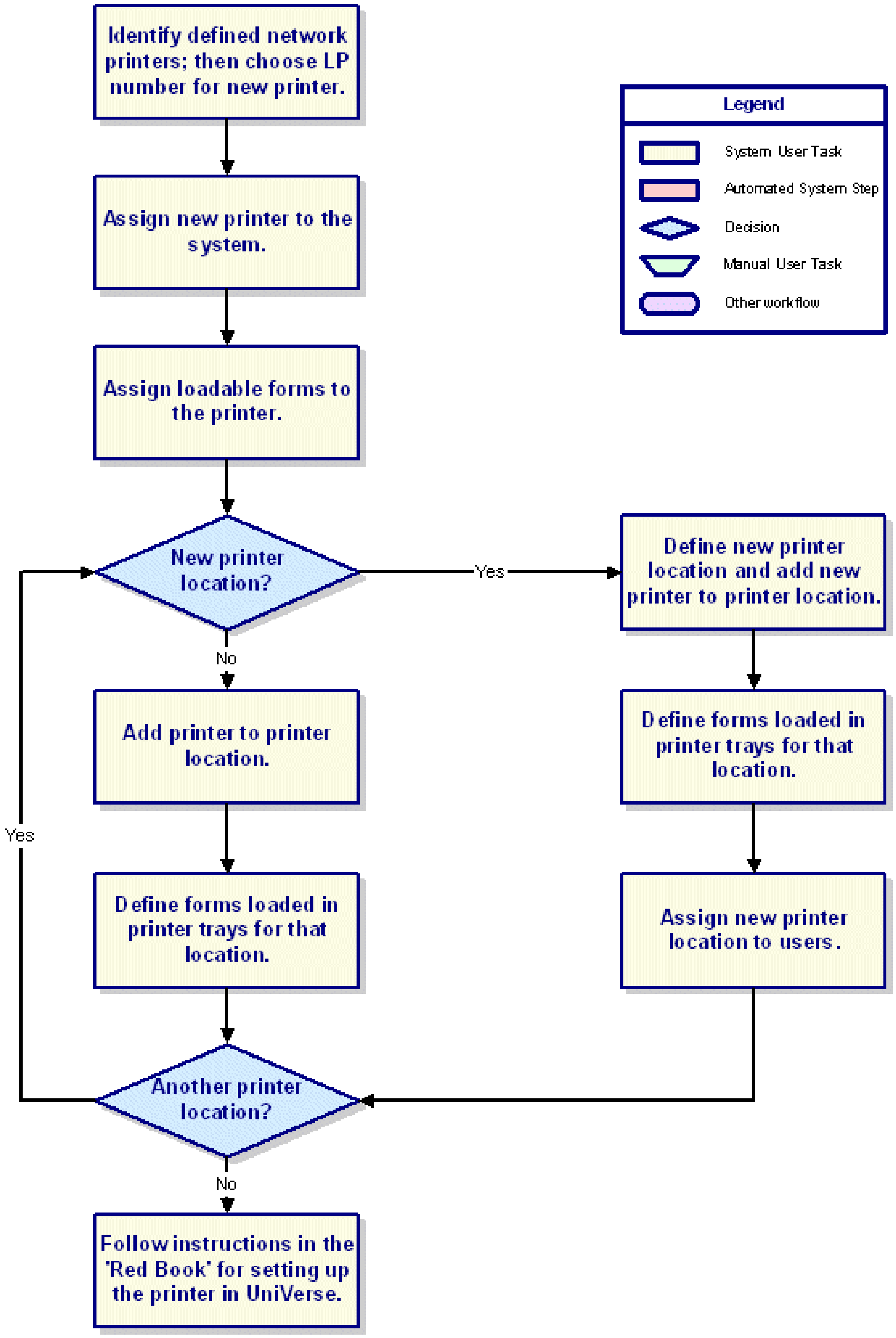
Use the printer system programs to set up the following:

- Printer Characteristics – Printer characteristics are pre-defined. Your installer and system administrator can use the Printer Characteristics screen to make necessary additions or adjustments for your system.
- Printer Assignments – Assign printers to the system and identify the loadable forms for each printer. Define printer locations and then assign printers to them. Assign printer locations to users.
- Printer Forms – Before printing from the system, you must assign forms to the documents your company prints and to printer trays.

After your printers are set up, you can use the system spooler to manage print jobs going to all the printers in the system.

The Adding Printers Workflow shows the tasks required for adding a new printer to the system.

Adding Printers Workflow



Printer Characteristics Overview

Printer characteristics define the types of printers your system uses. Printer characteristics are pre-defined. Your installer and system administrator can make necessary additions or adjustments for your system.

Printer characteristics define the following:

- Printer makes and models compatible with the system.
- Number of trays to which the printer can print. By assigning different trays to a printer, you can print various forms on one printer, such as invoices and checks.
- Escape sequences associated with the printer trays. Escape sequences define print formatting for different characters per inch (CPI) and lines per inch (LPI) combinations, as well as other print commands.
- Printer commands and the associated escape sequences.

To set tray and paper sizes for use with Eclipse Forms, see the Eclipse Forms documentation.

Viewing, Editing, and Copying Printer Characteristics

Use the Printer Characteristics screen to view or edit the characteristics of a printer type. The characteristics define the number of trays to which it can print and the print formatting escape sequences for different characters per inch (CPI) and lines per inch (LPI) combinations and printer commands.

Only the system administrator or installer should add additional printers and escape sequences. Other users should access the screen for view-only purposes.

Use this screen to perform the following tasks:

- View and edit printer characteristics.
- Copy printer characteristics to a new printer type.

To set tray and paper sizes for use with Eclipse Forms, see the Eclipse Forms documentation.

To view and edit printer characteristics:

1. From the **System > System Files > Printer Setup** menu, select **Printer Characteristics** to display the Printer Characteristics screen.
2. In the **Printer Type** field, press **F10** and select the printer for which you want to define characteristics or use the **Search** hot key to search for a printer.
3. In the **Description** field, enter a description of the printer type.
4. In the **# of Paper Paths** field, enter the number of trays available to the displayed printer.
5. In the **CPI** field, enter the number of characters per inch for which to define an escape sequence.
6. In the **LPI** field, enter the number of lines per inch for which to define an escape sequence.
7. In the **Escape Sequence** field, enter the escape sequence that defines print formatting for the CPI/LPI combination. You can find the correct escape sequence in the printer's manual.

   Begin each escape sequence with an exclamation point and end it with a capital letter. All other letters in the sequence must be in lower case.

   Note: Improperly aligned columns on a report may result from using **lp** for proportional spacing in the sequence instead of using **0p** for non-proportional spacing.

8. Use the following hot keys as necessary:

Hot Key	Function
Delete	Deletes a printer make and model with all associated escape sequences. We recommend that you not delete printers.

Hot Key	Function
Printer Commands	Displays the Printer Commands screen. Use this screen to assign escape sequences to printer commands.
Copy	Copies the displayed printer characteristics to a new printer make and model.
Search	Prompts you to enter a word to use to search the list of printers. When you press **Enter**, the system displays the Matches Found screen, listing all printers whose description contains the word entered here. Select the printer for which to display the Printer Characteristics screen.

To copy printer characteristics to a new printer type:

1. Display a printer type that has escape sequences similar to the printer to add.
2. Use the **Copy** hot key to display the Copy prompt.
3. At the prompt, type the name of the new printer type and press **Enter**. The system clears the screen and places the cursor in the **Printer Type** field.
4. Press **F10** to display the list of printers and select the new printer type.
5. Make any necessary changes to the escape sequences.
6. Press **Esc** to save the changes and clear the screen.

Editing Printer Command Escape Sequences

Use the Printer Commands screen to view and edit escape sequences assigned to the designated printer's printer commands. You can find a printer's escape sequences in its manual.

Only the system administrator or installer should use this procedure.

To edit printer command escape sequences:

1. From the **System > System Files > Printer Setup** menu, select **Printer Characteristics** to display the Printer Characteristics screen.
2. In the **Printer Make & Model** field, press **F10** and select the printer for which to edit the printer commands.
3. Use the **Printer Commands** hot key to display the Printer Commands screen.

   The following table describes the printer commands:

Command Option	Description
Select Path #	The paper path number assigned to each printer tray. As many **Select Path** prompts exist as the number of paper paths entered for the printer displayed on the Printer Characteristics screen. If two paths are entered, use **Select Path #1** for selecting the forms in the top tray and **Select Path # 2** for selecting the forms in the bottom tray. Assign the escape sequences to a path in order to format forms printed to this path.
Begin Reset	Resets the printer at the beginning of a print job. **!E** means page eject.
End Reset	Resets the printer at the end of a print job.
Portrait	Sets the page orientation to portrait (vertical).
Landscape	Sets the page orientation to landscape (horizontal).
Underline On	Starts underlining text.
Underline Off	Stops underlining text.
Bold On	Starts printing characters in bold typeface.
Bold Off	Stops printing characters in bold typeface.
Duplex Printing On	Starts printing on both sides of a sheet of paper.
Duplex Printing Off	Stops printing on both sides of a sheet of paper.

4. In the **Escape Sequences** column, place the cursor next to the option in the **Command** column for which to assign an escape sequence.

5. Enter the escape sequence, which you can find in your printer manual.

   Note: Remember to begin every escape sequence with an exclamation point, end with an upper case letter, and use lower case for all other letters in the sequence.

6. In the **Additional Information** field, enter additional free form information about the command.

7. Press **Esc** to save the printer command information and return to the Printer Characteristics screen.

Assigning Multiple Trays to Dot Matrix Printers

When setting up a Printronix or dot matrix printer for use with the system, assign it one paper path on the Printer Characteristics screen and then assign a form to that paper path (tray) on the Forms Loaded screen. If this is the only printer available at your location and you print various documents on different forms, each time the selected document does not match the form indicated on the Forms Loaded screen, the system prompts you to select a different printer that has that form loaded.

To prevent the system from prompting you for a different printer, you can trick the system into thinking that the printer has multiple trays containing different forms.

Only the system administrator or installer should use this procedure.

To define multiple trays for a dot matrix printer:

1. From the **System > System Files > Printer Setup** menu, select **Printer Characteristics** to display the Printer Characteristics screen.
2. In the **# of Paper Paths** field, enter the number of different forms to use with the printer. The system does not know that the printer has only one tray.

   Note: Do not define any escape sequences to skip trays.

3. From the **System > Printers** menu, select **Forms Loaded** to display the Forms Loaded screen.
4. On the Forms Loaded screen, assign the different forms to use on the printer to the imaginary trays.

   The system no longer prompts you to choose another printer.

Printer Assignments Overview

Before you can print from the system, you must do the following printer assignments:

- Assign printers to the system.
- Define printer locations and assign printers to the locations.
- Assign printer locations to users' terminals. If needed, you can also assign an override slave printer to a terminal.

In addition to assigning printers and printer locations, you also need to assign forms to printers.

When you log on, at the bottom of the screen the system displays the printer location assigned to your terminal and the printer in that location to which the PLAIN form is assigned. If a slave printer is assigned to the terminal, the system displays the word SLAVE.

If no printer location is defined for your terminal, the system prompts you to select from the locations assigned to your user record. If no printer locations are assigned at the user level, the system prompts you to select from the locations assigned to the physical branch in which the terminal is located.

If the PLAIN form is assigned to more than one printer in the selected printer location, the system displays a list of the printers with that form loaded and prompts you to select one. If the PLAIN form is not assigned to any of the printers in the selected printer location, the system displays a list of all the printers in the location and prompts you to select one.

After you are logged on, you can change the selected printer location for your terminal and, within the assigned printer location, you can change the printer assignment.

The following topics describe printer assignment procedures:

- Assigning Printers to the System
- Defining Printer Locations
- Assigning Printer Locations to Users
- Assigning Slave Printers to Terminals
- Changing a Terminal's Printer Location
- Changing a Terminal's Printer Assignment

Assigning Printers to the System

Use the Assign Printer/Fax screen to add a printer to the system or edit previously assigned printer values. The system stores the following information about the printers:

- The machine's name.
- The manufacturer's make and model.
- Loadable forms.

Use this screen to perform the following tasks:

- Add a printer.
- Edit printer values.

When creating printer assignments at your branches, you may want to maintain a printer worksheet similar to the one below.

Eclipse Printer	Printer Name	Branch Location	Printer Location	Forms Supported	IP Address/ Slave Printer	Laser/ Dot Matrix	Make/ Model
1	Main	1	Office	Plain Paper Invoices Statements Payable checks	168.32.1.52	Laser	HPLJ5.SI
2	Shipping	1	Whse	Shipping Tickets	255-255-255-255 IP Address	Dot Matrix	Okidata
3	Accting	2	Branch	Plain Paper	Slave Printer	Laser	HPLJ2000

To add a printer to the system:

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.
2. In the **Printer/Fax #** field, enter the word **new** to display a prompt.
3. At the prompt, enter a new printer ID up to five characters long.

   Note: The **Printer/Fax #** must match the **LP #** selected in the UniVerse Spooler configuration file for the printer being defined. The system uses this number to assign printers to locations.

4. In the **Name** field, assign a name to the displayed printer ID. The name can be up to nine characters long.

   The name can be a number or can contain numbers, but we recommend using a name that has more meaning. The name might indicate a location or the kind of printer. For example, the name could be Office, Counter, Warehouse, or HPLaser4P.

5. In the **Printer Type** field, press **F10** and select the printer type to assign to the printer ID.

   The required escape sequences assigned to the printer must be correct for the machine. Use Printronics or a generic printer as the printer type for a line printer.

   Note: Printer types are defined during system installation.

6. Leave the **Printer/Fax** field set to the default value **Printer**.
7. In the **Description** field, enter a description of the printer.
8. In the **Printer Path** field, enter the network path to the shared printer or fax device.

   The system converts forward slashes to back slashes, as you cannot enter back slashes in the Eterm environment and they are required to reference a network path.

9. In the **Macro Enabled (Y/N)** field, indicate whether to enable macro logic for this printer.

Option	Description
Yes	Enables macro logic. When a unique form prints for the first time, the system saves the form overlay data as a macro, and subsequent prints recall it using a print sequence. A printer can have up to 20 macros. After this, any new macro will overwrite the least used macro. The system imposes this arbitrary limit due to limited printer memory but may increase it later. • To view a list of the printer's macros along with their ID on the printer and usage, use the **Show Macros** hot key. • To delete all of the printer's macros from the system, use the **Reset Macros** hot key. To delete the macros from the printer, do a hard reset (power off and then on).
No	Disables macro logic. The system loads the form overlay each time it prints a form. Selecting this option also removes access to the **Show Macros** and **Reset Macros** hot keys. This is the default value.

10. Use the **Loadable Forms** hot key to assign loadable forms to the printer.
11. If you use Windows NT and want to connect the system to a shared network printer, use the **Alt UNC Path** hot key. At the prompt, enter the path name to the printer.

    The syntax for the command is as follows:

    //computer name/shared printer name, or for example, //**Boulder/hplaser**

12. Press **Esc** to save the information.

To edit printer values:

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.
2. In the **Printer/Fax #** field, press **F10** and select the printer ID from the list.

   The system populates the screen with the selected printer's information.
3. Edit the fields described in the previous task, as needed.
4. To delete a printer assignment, use the **Delete** hot key.

   The system prompts you to confirm the deletion.
5. To view the printer locations to which the selected printer is assigned, use the **Locations** hot key.
6. **Esc** to save the information.

Defining Printer Locations

A printer location is a group of printers accessible to terminals in a common work area, such as accounting, the counter, or the warehouse. A printer location can also define a work task, such as label or ship ticket printing. Terminals, users, and physical branches have assigned printer locations.

After you assign printers to the system in the Assign Printer/Fax program, use Printer Location Maintenance to define printer locations and assign printers to them. You can assign unlimited printers to a location. After they are defined, you can assign printer locations to users' terminals on the Terminal Setup screen.

Use the following tasks to:

- Define printer locations.
- Edit printer locations.
- View printer locations in TCL.

To define printer locations:

1. From the **System > System Files > Printer Setup** menu, select **Printer Location Maintenance** to display the Printer Location Maintenance screen.
2. In the **Printer Location** field, do one of the following:
   - Enter **new** to display a prompt. At the prompt, enter a new printer location.
   - Press **F10** and select the printer location to assign.
   - Use the **Select** hot key to search for the printer location to assign.
3. In the **Ship Ticket Branch** field, enter the branch where you want to print ship tickets from the terminals logged on to the printer displayed in the Printer Location field. If you leave this field blank, the system uses the normal branch selection logic to determine where a Pick up Now ship ticket prints. The system does not allow a branch to have more than one printer location assigned for Ship Ticket printing.

   If you use this printer location to print all Pick Up Now orders and credit releases in a branch, regardless of the user’s location, then enter the branch ID here.

   If a branch is entered, then the system uses the printer location displayed to always print Pick Up Now and Credit Release orders for this branch, regardless of a user's printer location. Define a printer for this location and ensure that the correct form is loaded on this printer. If you have multiple printers with the same required form loaded, you will be prompted to select one.
4. In the **Physical Branch** field, enter the branch where this printer location resides. The system compares the user's terminal physical branch to the printer's physical branch. If the system finds a match and no overrides exist, the system prompts the user to choose a printer.

5. In the **Printer#** column, enter the printers to which each terminal in this printer location has access. For each printer, position the cursor on a blank line, press **F10** and select a printer from the list.

   For each printer location, assign the plain paper printer first, followed by the remaining printers in descending order of importance.

6. Use the following hot keys as needed:

Hot Key	Description
Find	Displays the Find Printer # or Printer Name screen, which you can use to locate a printer in the **Printer#** column. Enter the number of the printer you want to locate in the **Printer #** field or enter the name in the **Printer Name** field and press **Esc**.
Delete Location	Deletes the displayed printer location. The system prompts you to confirm the deletion.

7. Press **Esc** to save the information.

To edit printer locations:

1. From the **System > System Files > Printer Setup** menu, select **Printer Location Maintenance** to display the Printer Location Maintenance screen.
2. In the **Printer Location** field, do one of the following:
   - Press **F10** and select the printer location to edit or delete.
   - Use the **Select** hot key to display the Printer Location Maintenance Select screen. Enter search criteria in one or more of the following fields and press **Esc**. The system displays the selected printer location information.

Field	Description
Printer Location	Printer location name. Selects that location.
Ship Ticket Branch	Branch. Selects the default printer location for printing this branch's ship tickets.
Physical Branch	Branch. Selects a printer location in this branch.
Printer #	Printer ID. Selects the printer location to which that printer is assigned.
Printer Name	Printer name. Selects the printer location to which that printer is assigned.

Note: If more than one printer location matches the search criteria, the system displays a list from which you can select the printer location.

3. Edit the printer location information, as described in the previous task.
4. Press **Esc** to save the information.

To view printer locations in TCL:

Use TCL to view all printer locations and the printers in each location.

1. From the **System** menu, select TCL to display the TCL screen.
2. Enter the following command to list the printers and their locations:

   LIST PRINTER.LOCS F1 F2 F3

   The TCL columns show the following information:

Column	Description
PRINTER.LOCS	Printer location name selected from the Printer Location Maintenance Select screen.
F1	The printer number from the Printer Location Maintenance Select screen.
F2	Ship ticket branch selected from the Printer Location Maintenance Select screen.
F3	Physical branch selected from the Printer Location Maintenance Select screen.

   Note: If the system has multiple branches in F2, you could have printing issues with Pick-Up Now and Credit Release order printing.

3. Press **Esc** to exit the screen.

Assigning Slave Printers to Terminals

Assigning a slave printer to a terminal tells the system to send print jobs from that terminal to the Windows default printer. The slave printer is connected to the terminal, and is considered the terminal's default printer. When you assign a slave printer to a terminal, you select the terminal from the Terminal Setup screen and assign the printer to that terminal.

You can also set up a receipt slave printer for a selected user or group terminal.

> **Note:** A report run from the phantom cannot print directly on a terminal's slave printer. To print to the slave printer, send the generated report to the Hold file and then print it from the print queue. To print the report directly, change the terminal's default printer to be a non-slave printer.

For more information about how slave printers work in the Eclipse Forms application, see the Eclipse Forms documentation.

How the System Determines Printer Location Priority

The following table shows how the system decides which printer will print a document:

Order for...	Priority 1 Printer Location is defined...	Priority 2 Printer Location is defined...	Priority 3 Printer Location is defined...
Pick-Up Now or Release Credit Hold	in the **PickticketPtrLoc** field on the Ship Via branch Overrides/Auto Scheduling screen.	in the **Ship Ticket Branch** field on the Printer Location Maintenance screen.	from the **Location** hot key in User Maintenance. This location displays on the left end of the message bar. The system uses this location if there are no ship via overrides or ship ticket branches defined.
Phantom printing		in the **Branch** and **Location** fields on the Automatic Shipping Ticket Printing screen.	in the Default Printer For Branch control maintenance record.

To assign a slave printer to a terminal:

1. From the **System > System Files** menu, select **Terminal Setup** to display the Terminal Setup screen.
2. In the **Search Criteria** field, enter the terminal ID to which to assign the slave printer.
3. Position the cursor on the ID and use the **Slave Printer** hot key to display the Slave Printer Assignment screen.

   The **Port** field displays the port ID to which the terminal is connected.

4. In the **Slave Printer** field, press **F10** and select the type of printer to which to print.

   Printer types are defined in Printer Characteristics.

5. In the **Form Loaded** field, press **F10** and select the form, such as labels or invoices, to assign.

   We recommend that you select ***ANY*** to allow the terminal to print on any form loaded into the printer.

6. In the **Receipt Printer** field, indicate whether the slave printer is a POS receipt printer.
   - **Y –** The printer prints a POS receipt for new or changed payments.
   - **N –** The printer does not print POS receipts.

7. In the **Emulation** field, if you entered **Y** in the **Receipt Printer** field, press **F10** and select the type of receipt printer being used so the system can send the correct command sequences to the printer. The default is Ithaca.

8. In the **Cash Drawer Attached** field, indicate whether the terminal is a POS terminal that opens the cash drawer after the cash receipt prints.
   - **Y –** The terminal opens the cash drawer after the POS cash receipt prints.
   - **N –** The terminal does not open the cash drawer.

9. In the **Pole Display Attached** field, indicate whether a Champion Systems DSP-800 Pole Display is attached to your POS system.
   - **Y –** Attached.
   - **N –** Not attached.

10. In the **POS Print Pick Ticket** field, press **F10** and select whether the system prints a pick ticket for pick up now orders.
    - **Normal –** Prints a pick ticket, if that is what the system normally does.
    - **Never –** Never prints a pick ticket.
    - **Prompt –** Prompts the user to print a pick ticket.

11. If you use the Eclipse Forms application for forms printing, in the **Slave Printer Path** field, enter the network path to a shared printer that the Eclipse Forms printer server can access.

    Note: The system converts forward slashes to back slashes, as you cannot enter back slashes in the Eterm environment and they are required to reference a network path.

11. Press **Esc** to save the newly assigned slave printer.

Changing a Terminal's Printer Location

A printer location is a group of printers accessible to terminals in a common work area, such as accounting, the counter, or the warehouse. Terminals, users, and physical branches have assigned printer locations.

Use the Change Location program to change the printer location to which your terminal is assigned.

To change a terminal's printer location:

1. From the **System** menu, select **Change Location** to display a list of printer locations.

   When you access this program, the system displays a list of the locations defined in your user record. If no locations are assigned in your user record, the system displays a list of valid locations for the physical branch for your terminal.

   If you press **F10** when viewing the initial list, the system displays a list of all available locations, not just the locations for the current physical branch. This list comprises all locations that exist in the branches for which you are authorized.

2. Select the printer location to which you want access and press **Enter**.

Changing a Terminal's Printer Assignment

Use the Change Printers program to change the default printer or printer tray assigned to your terminal.

- If your terminal has a slave printer assignment, the system displays each tray to which you can print and you can select a different tray.
- If your terminal does not have a slave printer assignment, the system displays all of the printers available to the printer location to which your terminal is assigned and you can select a different printer. You can also change your printer location to have access different printers.

To change a terminal's printer assignment:

1. From the **System > Printers** menu, select **Change Printers** to display the list of printers to which your terminal can be assigned.

   The screen displays the following information for each printer to which your terminal can print:

Field	Description
Printer	Printer identification.
Tray	Tray number (paper path) assigned to the printer.
Form Loaded	Form assigned to the printer tray.
Printer Type	Type assigned to the printer.

2. Position your cursor on the printer to use and press **Enter**. Do not press **Esc** or **F12**.

   Note: The system uses this printer for all plain paper printing unless you select another printer.

Printer Forms Overview

Before printing from the system, you must assign loadable forms to printers, identify which forms are loaded in the printer trays, and map forms to Eclipse documents.

For example, to print all general documents from a printer, assign forms of **PLAIN** or **ANY** to the printer trays. If a printer at the sales counter only prints invoices, assign this printer the form of **INVOICE** so that all invoices print in correct format. You can change the forms assigned to a printer whenever necessary.

The standard system includes forms common to all industries, along with recommendations for assigning forms to documents. Your system administrator can create and edit forms, as necessary, as well as reassign forms to documents.

The standard system also includes forms for order documents. Speak with your installers about special forms your company requires, so they can help you set up these forms during installation.

The following topics describe procedures for assigning and loading forms:

- Assigning Loadable Forms to a Printer
- Assigning Forms to Trays
- Assigning Forms to Documents
- Viewing a Printer's Loaded Macros
- Editing Forms Definition
- Maintaining Print Styles

Assigning Loadable Forms to Printers

Use the Loadable Forms screen to assign the forms available for use with a printer. This screen does not identify the forms currently loaded in the printer, just all the forms the printer can handle.

To assign loadable forms to a printer:

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.
2. In the **Printer/Fax #** field, enter the ID of the printer to which to assign loadable forms.
3. Use the **Loadable Forms** hot key to display the Loadable Forms screen.
4. For each form to assign, position the cursor on a blank line, press **F10** to display the defined forms, and select one.
   - For a printer where you print checks, invoices, and statements, assign the proper forms, such as **PAYABLE.CHECK**, **PLAIN**, and **STATEMENT**.
   - Assign the form ***ANY*** to print jobs on whatever paper is in the printer.
5. To delete a form from the list, position the cursor on the form and press **Alt-Delete**.
6. Press **Esc** to save this information and return to the Assign Printer/Fax screen.

See Also:

Printer Forms Overview

Assigning Forms to Printer Trays

Use the Forms Loaded program to view, change, and select which forms to load in the printers accessible to a terminal. Select these forms so that system documents print on the printer where the required form is loaded.

When you log on, the system displays the printer location assigned to your terminal and selects the printer in that location to which the PLAIN form is assigned as your default printer. If a slave printer is assigned to the terminal, the system displays the word SLAVE. To print a special form that is not loaded on the default printer, either change your default printer to one that has the special form loaded, or assign the special form to a tray in your default printer.

Before you assign forms to a printer's trays, be sure you have assigned them as loadable forms for that printer.

To assign forms to printer trays:

1. From the **System > Printers** menu, select **Forms Loaded** to display the Forms Loaded screen.

   The screen displays the following information:

Field	Description
Printer	Printers defined for the printer location assigned to your terminal.
Tray	Tray number or paper path of the printer.
Form Loaded	Form loaded in each printer tray. The field for each tray is blank until you assign a form. **Note:** This is the only field on the screen that you can edit.
Printer type	Make and model of the printer.

2. In the **Form Loaded** column, place the cursor next to the tray for which to change or assign forms.
3. Press **F10** to select from a list of forms that have been defined as loadable to the system.

   If a type of form is assigned as a loadable form for more than one printer in the same printer location, the system prompts you to choose a printer.
4. Repeat as necessary and press **Esc** when you are finished.

   Note: When you plan to use special forms, such as checks, preprinted invoices, or statements, assign the forms to the intended tray before putting the forms in the printer. This prevents another print job from printing on the special form. When you have finished with a special print job, remove the special forms before assigning a new form to the tray.

Assigning Forms to Documents

Use the Assign Form to Document screen to select the type of form on which you want a system document, such as an invoice, to print.

Installers define these forms when they install the system. The system administrator can edit forms assigned to documents, as necessary.

To assign a form to a document:

1. From the **System > System Files > Printer Setup** menu, select **Assign Form to Document** to display the Assign Form to Document screen.

   In the **Document** column, the system displays the documents your company prints. The **Form** column shows the forms assigned to those documents.

2. In the **Form** column, position the cursor next to the document for which to change forms and enter the new form.

3. Press **Esc** to save changes.

   The following table lists system documents and the form we recommend using for each:

Document	Form
• Bid • Packing Slip • Physical Card • Purchase Order • Physical Card • Sales Order • Sales Slip • Work Order	**PLAIN**
• Invoice	**INVOICE**
• Label	**LABELS**
• Payable Check	**PAYABLE.CHECK**
• Manifest • Pick Ticket • Purchase Receive • Purchase Receiver • Transfer Order	**MULTI-PURPOSE**
• Statement	**STATEMENT**

Viewing a Printer's Loaded Macros

The Loaded Macros screen displays a list of a printer's stored macros.

You can use macros to save form overlay data that is the same for each printing in printer memory. Speed increases, because the data, often large, does not have to be sent again each time.

When macro logic is enabled and a unique form is printed for the first time, the system saves the form overlay data as a macro. Subsequent prints recall the macro using a print sequence. A printer may have up to 20 macros. The system imposes this arbitrary limit due to limited printer memory. After this number, any new macro will overwrite the least used macro in the list.

To view a printer's loaded macros:

1. From the **System > System Files > Printer Setup** menu, select **Assign Printer/Fax** to display the Assign Printer/Fax screen.
2. In the **Printer/Fax #** field, enter the ID of the printer whose macro information you want to view.
3. Use the **Show Macros** hot key to display the Loaded Macros screen.

   The screen displays the following information for each macro loaded on the printer:

Field	Description
Loaded Macros	Macro ID in the system.
ID	Macro ID on the printer.
Used	Macro usage.

4. Press **Esc** to return to the Assign Printer/Fax screen.

See Also:

Assigning Printers to the System

Editing Forms Definition

Forms Definition displays the page setup parameters selected for a paper form. The standard system includes forms such as **PLAIN**, **MULTI-PURPOSE**, **PAYABLE.CHECK**, and **LABELS**, and the corresponding form definitions. Most of the forms provided with the system are standard in the industry and do not need to be changed.

If your company decides to change the style of a form, we recommend that you call Eclipse Support and request the change or bring it to the attention of the installers when they are on site.

Only the system administrator should access this program to make changes to any of the form definitions. Other users should access the screen for view-only purposes.

To edit form definitions:

1. From the **System > System Files > Printer Setup** menu, select **Forms Definition**.

   The system displays a list of forms.

2. Either select the form to edit or type **New** to create a form, and press **Enter** to display the Form Name screen.

   The system populates the fields with the following information:

Field	Description
Form Name	The name of the form you selected. If you selected **New** from the forms list, enter a name for the form to define.
Orientation	Whether the form is in portrait (vertical) or landscape (horizontal) format. The default format is Portrait.
CPI	The number of characters per inch across the page. CPI is typically 10 for normal presentations and 12 for condensed presentations. The default value is **10**.
LPI	The number of lines per inch down the page. LPI is typically 6 for a normal presentation or 8 for condensed presentations. The default value is **6**.
Width	The number of characters to print on the form from side to side. The default value is **80** for both portrait and landscape formats.
Length	The number of lines to print on the form from top to bottom. The default value is **66** for both portrait and landscape formats.
Top Margin	The distance between the top edge of the form and the first line of print. The default value is **0** (zero).
Left Margin	The distance between the left edge of the form and first character in the line. The default value is **0** (zero).
Bypass Eclipse Forms	Set this field to **Y** to indicate that this particular form is not run through the Eclipse Forms printing engine. Use this setting for form types such as labels that do not print properly on the Zebra pinter if run through Eclipse Forms.

3. Edit the fields, as necessary.

Note: If you make changes to a form and want to undo them, you can use the **Recall** hot key to abort changes made to a form in progress and recall the settings that existed before the changes were made. We recommend that you not use the **Delete** hot key.

4. Press **Esc** to save the updated information.

Maintaining Print Styles

Use Print Style Maintenance to define the price printing options for order documents. The print styles defined in Print Style Maintenance are used throughout the order entry system. For example, from the purchase order header screen, the system uses these print styles as options for the **Print Style** field.

Your installer is responsible for defining print styles. Work with your installer to set up any special print styles at the time of installation.

To maintain print styles:

1. From the **System > System Files > Printer Setup** menu, select **Print Style Maintenance** to display the Print Style Maintenance screen.
2. In the **Print Style** field, press **F10** and select a print style from the displayed list.

   The screen displays header information about the print style in the following fields:

Field	Description
AltDesc	Whether this print style uses the product's alternate description.
AllGens	Whether this print style applies to all generations of the order.
Description	The description of the print style.

3. The screen also displays the following information for each column defined for the print style:

Field	Description
Column #	The column number of data displayed in this style.
Start Pos	The start position of characters in that column.
Format	Whether the characters are right or left justified followed by the number of places to the right of the decimal point, followed by the pound sign (#) and the number of characters that can print in that column. For example, *R2#12* means that the item listed is right justified, has two decimal places, and prints up to 12 characters in the column.
Basis	The print style basis displayed in the column. These can be the global basis names from Price Line Maintenance, or other basis set up on your system. For a list of bases, see the section below.
Extend	Whether the column's characters can be extended.
Heading	The heading for the column.

4. Press **Esc** to save the changes.
   - To return to the original print style before your changes, use the **Recall** hot key before you exit the screen.
   - To delete a style, use the **Delete** hot key. The system prompts you to confirm the deletion. Once you delete a style, you cannot recall it.

Print Style Basis

Your system may include the following print style bases, depending on the forms your company uses. The following table describes how each basis is used by printed forms:

This entry in the Basis field...	Shows...
Global Basis Names	The price derived from the global basis names from Price Line Maintenance that are used to price items.
Cust Net	The final price paid by the customer.
Blind	A Blank column for the item.
Blind Sub	Like Blind, above, but shows subtotals.
Dft Retail	The price that would have been paid without special pricing. This is the same as Sales Order Entry's "Pricing" view.
Basis Desc	The basis on which the price was based, or the local basis name.
Formula	The formula used to determine a price.
Multiplier	The arithmetic expressions, such as addition (+), subtraction (-), multiplication (*), and division / used to determine the price.
Discount %	The discount the customer received.
UoM	The pricing unit of measure, or the price per from the Product Price Sheet Maintenance screen.
Orig Price	The price paid without discount.
Order Cogs	The value the inventory is relieved of.
Order Comm	The value used to calculate margins for commissions.
Unit Price	The final price paid by the customer.
Qty UM Prc	The Pricing quantity from Product Maintenance or Price Line Maintenance.
Prc UM Prc	The pricing unit of measure, or the Price Per from the Product Price Sheet Maintenance screen. The column shows the price plus the unit of measure, such as, 100.00c.
Buy UM	The unit of measure set up in Product Maintenance for purchasing.
Showroom	Showroom price.

Spooler Management Overview

The spooler runs in the background and controls all print jobs directed to system printers.

The Spooler Management application presents various options to control the spooler, print queues, and print jobs. From here, you can view printer statuses, suspend print jobs, move print jobs to different printers, re-start print jobs, kill print jobs, and perform other spooler management options. You can also ping a device, start the spooler, and stop the spooler.

Managing the Spooler and Print Jobs

Use the Spooler Management screen to manage all print jobs in the system. You can view statuses, move print jobs to other printers, suspend, and even cancel print jobs.

To manage the spooler and print jobs:

1. From the **System > Printers** menu, select **Spooler Management** to display the Spooler Management screen.

   The screen displays the following functions:

Option	Function
Spooler Status	Displays the status of all printers and their associated print jobs.
Suspend an Active Print Job	Stops a print job in process. **Note:** If the print job is going to a laser printer and you use **Halt Printing to a Printer** to move the job instead of **Release a Suspended Print Job**, you must press the **Form Feed** button on the printer to clear the printer buffer.
Release a Suspended Print Job	Restarts a suspended print job.
Move a Print Job	Moves a print job from one printer to another.
Halt Printing to a Printer	Pauses all scheduled print jobs at a printer. The job that is printing finishes. Use **Resume Printing to a Printer** to restart printing at that printer.
Resume Printing to a Printer	Cancels the halt printing order.
UNIX Print Queue Status	Displays detailed status information for a selected UNIX printer queue. The system prompts you to **Enter Print Queue # (ie: lp2, Null for ALL).** You can send the report to your Hold file.
Bring a Printer Back Up	Brings a selected printer back up to the system. The system prompts you to **Enter Print Queue # (ie: lp2).**
Ping a Device	Tests the connection to the designated device. The system prompts you to **Enter IP Address or Print Queue # (ie: lp2).**
Kill a Print Job	Stops a selected print job and deletes it from the queue.
Stop Spooler	Turns the spooler off. Call Eclipse Support to use this option.
Start Spooler	Turns the spooler on if the queues are turned on. Call Eclipse Support to use this option.

Note: The SPOOLER.MANAGEMENT authorization key determines which functions display on the Spooler Management screen for a user.

2. Select the function to perform.

   The system displays a list of each printer and its print jobs. The list displays the following information for each print job:

Field	Description
Printer	Printer to which the job is printing.
Q	Indication whether the print queue in which the job resides is turned **on** or **off**.
P	Indication whether the printer to which the job is printing is turned **on** or **off**.
Form	Type of form assigned to the print job.

3. Position the cursor on the printer queue or print job and press **Enter** to perform the selected function.

Spooler Status

The view-only Spooler Status screen displays the current operation of all printers and their associated print jobs. Check the spooler status to preview your print job before you halt action of any print job.

Note: If you print more than one copy of any transaction, all copies after the first are labeled as "Reprint."

To view the Spooler Status screen:

1. From the **System > Printer > Spooler Management** menu, select **Spooler Status** to view the Spooler Status screen.
2. For each print job the screen displays the following information:
    - The printer location.
    - A print job number.
    - The print job description.
    - The user sending the print job.
    - Whether the print job is currently printing (loaded).
    - The size of the print job in bytes.
    - The number of copies.
    - The status of the print job.
3. Press **Esc** to exit the screen.

See Also

Managing the Spooler and Print Jobs

Killing Print Jobs

Moving Print Jobs

From the spooler, you can move a print job that is either waiting to print or that is in the process of printing.

Before moving a print job that is in process, you need to pause the printing process. After moving the print job and clearing any partially printed pages from the printer, you can resume the printing process.

Use the following procedures to:

- Move a queued print job to another printer.

  Use this option when a document you need to print now is behind another large print job.

- Move a print job that is in process..

  Use this option when the printer on which a job is printing breaks down or when a user assigns a long job to the wrong printer.

To move a queued print job to another printer:

1. From the **System** > **Printers** menu, select **Spooler Management** to display the Spooler Management screen.
2. Select **Move a Print Job** and press **Enter** to display a list of printers and the print jobs queued for each.
3. Position the cursor on the print job to move and press **Enter** to display a destination printer prompt.
4. At the prompt, enter the number of the destination printer to add the job to the selected printer's queue.

To move a print job that is in process:

1. From the **System** > **Printers** menu, select **Spooler Management** to display the Spooler Management screen.
2. Select **Suspend an Active Print Job** and press **Enter** to display a list of system printers and the print jobs queued or running on each one.
3. Select the print job you want to suspend and press **Enter** to re-display the Spooler Management screen.
4. Select **Halt Printing to a Printer** and press **Enter**.

   The system prompts you to confirm your action and then displays a list of the system printers.
5. Select the printer whose print job you suspended and press **Enter** to re-display the Spooler Management screen.
6. Select **Move a Print Job** and press **Enter** to display a destination printer prompt.

7. At the prompt, enter the number of the destination printer to add the suspended print job to the selected printer's queue.

   The job will start printing again from the beginning.

8. On the first printer, press the **Form Feed** button to clear the buffer and any partially printed pages from the printer.

9. On the Spooler Management screen, select **Resume Printing to a Printer** and press **Enter**.

   The system prompts you to confirm your action and then displays a list of the system printers.

10. Select the print job's original printer and press **Enter** to start the next print job at that printer.

11. Press **Esc** to exit the Spooler Management screen.

Killing Print Jobs

From the spooler, you can stop a print job while it is printing and remove it from the queue. Once you kill a print job, you will have to resend it to print it again.

Before killing a print job, you need to pause the printing process. You can then kill a print job that is queued or in process. After clearing any partially printed pages from the printer, you can resume the printing process.

To kill a print job:

1. From the **System > Printers** menu, select **Spooler Management** to display the Spooler Management screen.
2. Select **Halt Printing to a Printer** and press **Enter**.

   The system prompts you to confirm your action and then displays a list of the system printers.
3. Select the printer you want to pause and press **Enter** to re-display the Spooler Management screen.
4. Select **Kill a Print Job** and press **Enter**.

   The system prompts you to confirm your action and then displays a list of system printers and the print jobs queued or running on each one.
5. Select the print job to delete and press **Enter**.

   The system prompts you to confirm the deletion and then re-displays the Spooler Management screen.
6. On the printer, press the **Form Feed** button to clear the buffer and any partially printed pages from the printer.
7. On the Spooler Management screen, select **Resume Printing to a Printer** and press **Enter**.
8. Press **Esc** to exit the Spooler Management screen.

Custom Menus Overview

The system ships with a standard menu structure called MAIN, which provides access to all system applications. To give a user access to all the system applications, assign MAIN as the user's root menu. When the user accesses Eclipse, the root menu displays across the top of the screen and provides access to the application menus.

From each application menu, users can access the functions and additional menu options associated with that application. For example, users can press **F2** to display the System menu. From the System menu users can select **Message System** to display the Message System program or **System Files** to display the System Files menu.

You and your installer can create user-defined menus to meet your company's needs. For example, if your company does not sell products that require material safety data sheets (MSDS), you can create a user-defined Files menu and remove the MSDS option. Then you can create a user-defined MAIN menu and replace the link to the standard Files menu with a link to your user-defined Files menu.

Use this process to create variations of the MAIN menu for different user groups within your company. Then, in User Maintenance, assign each user the root menu that corresponds to the user's job function. Use custom menus to determine which programs users can access, simplify navigation for users, and create unique menus for users with special functions.

Do not modify the standard menus shipped with the Eclipse system, because future software upgrades will overlay any changes you make. Copy and rename a standard menu and then modify the copy.

Creating Custom Menus

Custom menus are variations of standard menus that reflect the needs of your installation. Assign custom menus to users according to their job function. The menus determine which programs users can access.

You can create a custom menu by copying and modifying another menu or you can build it yourself .

Use the following procedures to:

- Create a custom menu from another menu.
- Build a custom menu.

After you create a custom main menu, assign it as the root menu for the appropriate users. If you create a custom submenu, assign it to a menu to which the users for whom you created it have access.

To create a custom menu from another menu:

1. From the **System > System Programming** menu, select **Program Editor** to display the Program Editor screen.
2. In the **File Name** field, enter **menus**.
3. In the **Edit Program** field, enter the name of the menu to copy.

   For example, to copy the Files menu, enter **Files**.
4. Use the **Copy** hot key to display the Menu Copy Prompts screen.

   The system populates these prompts with the MENUS file name and the name of the menu being copied.
5. At the **to Program** prompt, enter the new menu name.
6. At the Do you want to KEEP Current Version sequence? (Y/N) prompt, enter **N**.

   The system replaces the current version number of the copied menu with a 1 for the new menu.

   The cursor moves to the unlabeled field of codes on the next line of the Program Editor screen.
7. Enter **E** (edit) to display the Sub-Menu Maintenance screen.

   This screen displays the setup information for the copied menu.
8. Edit the copied menu as described in the Editing Menus topic.
9. Press **Esc** to save the new menu.
10. Press **Esc** to exit the Program Editor.

    Note: Assign custom menus to users in the **Root Menu** field in User Maintenance.

To build a custom menu:

1. From the **System > System Programming** menu, select **Program Editor** to display the Program Editor screen.
2. In the **File Name** field, enter **menus**.
3. In the **Edit Program** field, enter a new menu name.

   Note: For a user-specific custom menu, the new menu name must be &userid& or &useridXX&, where userid is the user ID of the person for whom you are creating this menu and XX is an optional suffix if the user has more than one custom menu.

   The cursor moves to the unlabeled field of codes on the next line of the Program Editor screen.
4. Enter **E** (edit) to display the Sub-Menu Maintenance screen
5. Create a new menu as described in Editing Menus.
6. Press **Esc** to save the new menu.
7. Press **Esc** to exit the Program Editor.

   Note: Assign custom menus to users in the **Root Menu** field in User Maintenance.

Creating User-Specific Custom Menus

A user-specific custom menu is one that can only a designated user can access. For example, if you have one user who is responsible for a particular administrative task, you can create a menu for the application used to perform that task that only that user can access.

Create user-specific custom menus by giving the menu a name using the ID of the user for whom it is being created.

- A user-specific menu name consists of an ampersand (&), the user ID of the designated user, and another ampersand.

  For example, for a user whose ID is **SCOTTR**, name a user-specific menu **&SCOTTR&**.

- If you need more than one user-specific menu for this user, you can add characters between the user ID and the second ampersand.

  For example, you can have two user-specific menus named **&SCOTTR01&** and **&SCOTTR02&**.

  Note: Although the extra characters in this example are two numbers, you can append up to nine alphanumeric characters to a user ID.

After creating a user-specific custom menu, you need to assign it to a user-defined menu.

Modifying Standard Menus

You can modify standard menus to suit your company's needs. Modify menus by:

- Deleting links to the functions your company does not use.
- Rearranging the order in which the menu links are listed.
- Adding new links to screens or reports that you have created.

Copy a standard menu and then modify the copy to suit your needs.

To modify a standard menu:

1. From the **System > System Programming** menu, select **Program Editor** to display the Program Editor screen.
2. In the **File Name** field, type **menus** and press **Enter**.
3. In the **Edit Program** field, enter the ID of the menu to modify.

   The cursor moves to the unlabeled field of codes on the next line. Each code represents an option you can enter.
4. Enter **E** (edit) to display the Sub-Menu Maintenance screen.

   This screen shows the setup information for the selected menu.
5. Edit the copied menu as described in Editing Menus.
6. Press **Esc** to save the new menu.
7. Press **Esc** to exit the Program Editor.

Editing Menus

Use the Sub-Menu Maintenance screen to edit a menu. This screen lists the options that display on the menu and identifies the screen, program, report, mass load, or graph to which each option links.

You can delete items from the menu and add new items to the menu. Rearrange items on the menu by deleting an item, inserting a blank line at the new location, and then adding the item on the blank line.

To edit menus:

1. Use the procedure described in Creating Custom Menus or Modifying Standard Menus to display the Sub-Menu Maintenance screen.

   If you are building a menu, the screen is blank. If you are editing a menu, the menu options and links display.

2. Position the cursor on the item to edit. You can also do one of the following:

   - To insert a blank line above the line on which the cursor is positioned, press **Alt-Insert**.
   - To delete the line on which the cursor is positioned, press **Alt-Delete**.

3. In the **Title** field, enter the keyword or phrase to list on the menu. This identifies the screen or submenu to which that option links.

4. In the **Hot Key** field, enter the letter from the **Title** to use as the hot key character for that menu selection.

   Capitalize the selected letter in the **Title** and do not use it for any other menu selection on this screen. For example, if you use the "**t**" in Custom as the mnemonic, spell the title as **CusTom**.

5. In the **Action** field, enter the prefix and the ID of the item to which the menu option links.

6. To enter more detailed menu information, use the **Expand Line** hot key to display the Sub-Menu Expanded Item Maintenance screen.

   The system populates the **Title**, **Hotkey Character**, and **Action** fields on this screen with the information entered on the Sub-Menu Maintenance screen.

Complete the following fields, as needed, and then press **Esc**.

If the menu is attached to...	Then...
Solar Eclipse	Complete the following fields: • In the **Java Title** field, enter the title to display in Solar Eclipse for this menu option. • In the **Java Hotkey** field, specify the hot key character from this title that accesses the items to which this menu option links.
A program that can display multiple screens	In the **Passer Value** field, enter the value to pass to the program that identifies which screen to display for this menu option. For example, the same program runs Report Writer and Mass Load. Menu selections that display the report writer version of the Report Writer/Mass Load Design screen use the passer value **R**. Menu selections that display the mass load version of the Report Writer/Mass Load Design screen use the passer value **M**.
A companion product	In the **Auth Product** field, enter the companion product authorization code. If a company is not authorized for this companion product, this menu option does not display on the menu.

Repeat steps 2 through 6 for each menu option to edit.

7. Press **Esc** to save the edited menu.
8. Press **Esc** to exit the Program Editor.

Assigning Custom Menus

Customizing standard Eclipse menus includes one or more two-step processes. After you create a custom menu, you need to assign it.

Custom Main Menus

After you create a custom main menu, you need to assign it as the root menu for the appropriate users.

For example, you have a group of users who should not have access to the A/R and A/P menus. Create a user-defined version of the MAIN menu that excludes the A/R and A/P menus, and then assign the user-defined menu as the root menu to these users.

To assign a root menu to a user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.

   Note: You must be assigned the USER.MAINT.ALLOWED authorization key to access this screen.

2. In the **User ID** field, enter the user whose record you want to update.
3. In the **Root Menu** field, enter the name of the main menu to assign to this user.
4. Press **Esc** to save the information and exit the screen.

Custom Submenus

When working with submenus, it is necessary to execute a series of two-step processes to create a user-defined menu. If you create a custom submenu, you need to assign it to a menu to which the users for whom you created it have access.

For example, your company does not use material data safety sheets (MSDS) and you want to remove this menu option from the FILES menu for all users.

- In the first two-step process, create a *user-defined copy* of the FILES menu and remove the link to the MSDS program.
- In the next two-step process, create a *user-defined copy* of the MAIN menu and change the link to the standard FILES menu to point to your *user-defined* FILES menu.
- Finally, assign the *user-defined* MAIN menu as the root menu for your users.

User-specific Custom Menus

The last item on the standard SYSTEM menu is a link to the **User Custom Menu**. If you create user-specific custom menus, each user can access their user-specific menu by clicking the **User Custom Menu** link.

If you create multiple user-specific custom menus for one user, follow the guidelines in Understanding Menu Option Prefixes for adding the appropriate links for the additional user-specific menus to other user-defined menus.

Menu Option Prefixes

The following table shows the prefixes to attach to IDs when editing menu options. The prefix identifies whether the associated ID is a program, another menu, a report writer report, a mass load, a G/L report, graph, or a user-defined screen.

To access a...	In the Action field, enter the...	With the following prefix...
Program For example: the G/L Account Maintenance program.	Program ID	**no prefix** For example: **GL.MAINT**
Menu For example: • The G/L Reports menu. • A user-specific menu named &userid&. • A user-specific menu named &userid02&.	Menu ID	**MENU-** For example: • **MENU-GL.REPORTS** • MENU-&& • MENU-&&02
Report For example: ABC Codes Report.	Report writer report ID	**LREP-** For example: **LREP-ABC.CODES**
Mass load For example: New Branch Pricing Mass Load.	Mass load ID	**LOAD-** For example: **LOAD-BRANCH.PRICING**
G/L report For example: the G/L Expense Report.	G/L report ID	**GL-** For example: **GL-EXPENSE**
Graph For example: a graph named BR.MGR.	Graph ID	**EGRAPH-** For example: **EGRAPH-BR.MGR**
User-defined screen For example: a user-defined screen named CAROLZ.SCREEN.	User-defined screen ID	**FORM-** For example: **FORM-CAROLZ.SCREEN**

Viewing a User's Root Menu

From the Program Editor, you can create a report that lists all the applications linked to a menu. You can use this report to determine which applications are included in a user's root menu.

To view a user's root menu:

1. From the **System > System Programming** menu, select **Program Editor** to display the Program Editor screen.
2. In the **File Name** field, type MENUS.
3. In the **Edit Program** field, enter the name of the menu you want to view.

   The cursor moves to the unlabeled field of codes on the next line. Each code represents an option you can enter.
4. Enter the **ME** (menu explode) option.

   The system generates the report, but the Program Editor screen does not change.
5. Press **Shift-F1** to display the report on the Hold Entry Pre-View screen.

   The report lists the links on each menu and submenu.
6. To print a copy of the report, use the **Print** hot key.
7. Press **Esc** to return to the Program Editor
8. Press **Esc** to exit the Program Editor.

User-Defined Functions Overview

Customize your system with user-defined functions, without affecting the integrity of the standard screens or associated files.

By defining subroutines and formats, you can customize the following:

- Printing labels for shipping, receiving, transfers, products, and customer- or vendor-specific part numbers. Once labels are customized to your company's needs, you can print the correct labels from the applications.
- Text files that you want to upload into the application. You can integrate data, such as price updates, into the application by uploading the text file into the spooler and then into the corresponding application.
- Files that you want to upload into Sales Order Entry. If your outside sales people place orders on a portable PC, they can upload the files into the SOE Body screen directly from the files on their PC.
- User-defined screens that you can use to enhance applications for your company.
- Order entry views if the standard views do not meet all of your company's needs.
- F9 and F11 help topics.

Maintaining User-Defined Labels

Use subroutines to produce the special labels printed for your company's applications.

For each application area, you need to identify the associated label and document subroutines. Once defined, you can print the defined labels from the application areas. The following table shows each application area and how to display the labels defined for that application:

To display label options for...	Use the...
Shipping labels in SOE	**Label** hot key on the SOE Body screen.
Receiving labels in POE	**Label** hot key on the POE Body screen.
Transfer labels in TOE	**Label** hot key on the TOE Body screen.
Product labels in Product Label Printing	**F10** key in the **Label Format** field on the Product Label Printing screen.
Customer/Vendor Specific Part Number labels	**Print Label** hot key on the Customer/Vendor Specific Part Numbers screen.

Use the User Defined [application name] Label Format Maintenance screen to define the label subroutines associated with each application. The title of the screen varies for each application, but the fields and hot keys are the same.

To maintain user-defined labels:

1. Display the **User-Defined Documents** menu in one of the following ways:
   - From the **System** > **System Programming** menu, select **User Defined Functions**.
   - From the **Tools** menu, select **User Defined Documents**.
2. From this menu, select one of the following applications to display the label format maintenance screen:
   - User Defined Shipping Documents
   - User Defined Receiving Documents
   - User Defined Transfer Documents
   - User Defined Product Documents
   - User Defined Customer Documents
   - User Defined PN Xref Documents

   Note: You must be assigned the SYSTEM.PROGRAMMING authorization key to use these label format maintenance programs.
3. In the **Label Format Title** field, enter an identifying name for the label format.
4. In the **Subroutine Name** field, enter **OIDIMAGING.OUT**, the subroutine that prints the label document.

5. In the **Typ** field, enter one of the following subroutine types:
   - **IM –** Item specific, multi-call.
   - **IS –** Item specific, single-call.
   - **OM –** Order specific, multi-call.
   - **OS –** Order Specific, Single-Call
   - **NO –** No auto looping.

   The writer of the subroutine can tell you which type to assign.
6. In the **Form** field, press **F10** and select the form on which the designated label prints, such as **LABEL**.

   Note: The system determines which printer has this form loaded. Forms are defined on the Forms Definition screen.
7. Press **Esc** to save the information and exit the screen.

   Note: Do not use the **DDE Subroutine** hot key. This key is for internal use by Eclipse personnel only.

Maintaining User-Defined Upload Formats

You can upload text files to the spooler so that multiple applications can import them.

For example, you have just received a text file of price updates for your plumbing products. Upload this text file into the spooler, and then use the Price Updating function to update the prices for all of your plumbing supplies.

For each type of text file you want to upload, you need to create an upload format, which identifies the subroutine the system uses to format the data and perform the upload.

To maintain user-defined upload formats:

1. Display the User Defined Upload Format Maintenance screen in one of the following ways:
   - From the **System** > **System Programming** > **User Defined Functions** menu, select **User Defined Upload Processing**.
   - From the **Tools** > **User Defined Documents** menu, select **User Defined Upload Processing**.
2. In the **Label Format Title** field, enter a name that identifies the data to upload.
3. In the **Subroutine Name** field, enter the name of the subroutine that uploads the data.

   Note: The **Typ** and **Form** fields do not apply to upload processing, and the **DDE Subroutine** hot key is for internal use by Eclipse personnel only.
4. To limit subroutine access to users assigned a designated authorization key, use the **Authorization** hot key.

   At the prompt, press **F10** and select the authorization key which must be assigned to the user.
5. Press **Esc** to save the information and exit the screen.

Maintaining User-Defined OE Import Formats

From the SOE Body screen, you can import an order's line item information from a data file on your PC. Your outside salespeople can use this feature to enter an order on a portable device and then import all the quantity and product information directly into a sales order.

Before using this feature, you need to set up the system to work with your data files. For each type of text file you want to upload into Sales Order Entry, identify the subroutine the system uses to format the data and perform the import.

To maintain user-defined OE import formats:

1. Display the User Defined Bid Upload Format Maintenance screen in one of the following ways:
   - From the **System** > **System Programming** > **User Defined Functions** menu, select **User Defined OE Import**.
   - From the **Tools** > **User Defined Documents** menu, select **User Defined OE Import**.
2. In the **Label Format Title** field, enter a name that identifies the data to import.

   This name displays in the **F10** options list for the **File Format** field on the Order Entry Data Import screen.
3. In the **Subroutine Name** field, enter the name of the subroutine that imports the data.

   Note: The **Typ** and **Form** fields do not apply to importing data, and the **DDE Subroutine** hot key is for internal use by Eclipse personnel only.
4. To limit subroutine access to users assigned a designated authorization key, use the **Authorization** hot key.

   At the prompt, press **F10** and select the authorization key which must be assigned to the user.
5. Press **Esc** to save the information and exit the screen.

User-Defined Screens

You must attend a class or receive training before you can create user-defined screens.

The system includes utilities you can use to develop custom user-defined files and screens. You can create user-defined screens for entering information into a standard file or a user-defined file.

- You can create user-defined screens and append them to standard screens without affecting the integrity of the original screen or associated files.
- You can also create stand-alone user-defined screens to use with user-defined files.

Creating and Editing User-Defined F9 Help

You can create your own F9 help for fields. For example, you can enter user-defined instructions that are specific to your company's operations.

If you have created user-defined help for a field, the system displays this help when you press **F9** in that field. In the screen title, the asterisk (*) preceding and "User version" following the field ID indicate that you are viewing user-defined help. Use the **Eclipse Version** hot key to display the system help for this field and the **User Version** hot key to re-display the user-defined help.

Users must be assigned the HELP.EDIT authorization key to create user-defined F9 help.

To create or edit user-defined F9 help:

1. Position the cursor on the field for which you want to create user-defined help and press **Shift-F9**.

   The system displays the user-defined version of the help, if one already exists. Otherwise, the system displays the Eclipse version of the help.

2. Edit the text displayed on the screen in one of the following ways:

   - Manually type the text you want to enter.
   - Upload a .txt file from your PC by using the hidden **Alt-L** for upload hot key and entering the DOS path to the file you want to upload. For example, enter **c:/text/note.txt**. Use forward slashes in the path name and be sure to include the .txt extension, or the upload will not work.
   - Copy and paste word processing text into the F9 help screen. For copying and pasting to work, from the Eterm menu bar select **Configure**, then select **Communications**, and then click the **Enable Edit** box.

     When typing, uploading, or pasting text, be aware that the F9 help screen does not have all the features of a word processor, nor does it work like a typical word processor. Adhere to the following guidelines:

     - Pressing **Enter** within a paragraph does not cause the following text to wrap to the next line.
     - Pressing **Enter** at the end of text does cause the cursor to wrap to the start of the next line.
     - The **Tab** key does not work.
     - The **Backspace** key does not delete text.
     - The **Delete** key works normally.
     - Bullets do not upload as bullets.
     - To move text to the next line, press the **Insert** key, place the cursor at the start of the text to be moved, and press the **Spacebar** until the text wraps.

- To insert a blank line between paragraphs, press **Alt-Insert**.
- To remove a blank line, place the cursor in the line and press **Alt-Delete**.
- If you upload text into a Help Document Maintenance screen that contains existing text, the uploaded text will replace everything on the screen.
- When copying and pasting text with Eterm for Windows, you can paste new text at the end of the existing text. Just be sure to position the cursor correctly.

3. Press **Esc**.

   The system displays the following prompt: Item changed. Update file?

4. At the prompt, enter **Y**.

   The system saves the updated text as the User version of the help.

   Note: Regardless of whether you edited the User version or the Eclipse version of the help, the system saves your changes as the User version.

Viewing User-Defined F9 Help

If you have created user-defined help for a field, the system displays this help when you press **F9** in that field.

To display user-defined F9 help:

1. Position your cursor in the field for which you want to view the user-defined help and press **F9**.

   In the screen title, the asterisk (*) preceding and "User version" following the field ID indicate that you are viewing user-defined help.

2. Use the **Eclipse Version** hot key to display the system help for this field.
3. Use the **User Version** hot key to re-display the user-defined help.

Creating and Editing User-Defined F11 Help

Pressing **F11** on a screen accesses the online help system and displays a topic associated with that screen.

You can also create custom F11 help topics for screens. For example, you can enter user-defined instructions that are specific to your company's operations. You can create new F11 help files by starting a new document and entering the text or by copying and editing an existing help document.

After creating a user-defined help file, you need to assign it to a screen.

Users must be assigned the HELP.F11.EDIT authorization key to create user-defined F11 help.

Use the following tasks to:

- Create user-defined F11 help.
- Copy and edit user-defined F11 help.
- Edit user-defined F11 help.
- Assign user-defined F11 help to a screen.

To create user-defined F11 help:

1. From the **System > System Files > Documentation** menu, select **Help Document Maintenance** to display the Help Document Maintenance screen.
2. In the **Keyword** field, type the word **new** and press **Enter**.

   The system assigns a document number.
3. In the **Topic Heading** field, enter a title for the help document.
4. In the **Keywords** field, enter any keywords that can be used to search for the article using the Help screen. Keywords are not case sensitive.
5. In the **Text** field, enter the text of your help document in one of the following ways:
   - Manually type the text you want to enter.
   - Upload a .txt file from your PC by using the **Upload** hot key and entering the DOS path to the file you want to upload. For example, enter **c:/text/note.txt**. Use forward slashes in the path name and be sure to include the .txt extension, or the upload will not work.
   - Copy and paste word processing text into the F11 help screen. For copying and pasting to work, on the Eterm menu bar select **Configure**, then select **Communications**, and then click the **Enable Edit** box.
6. Note the help topic ID number and then press Esc to save the F11 help topic.

To copy and edit user-defined F11 help:

1. Display the document you want to copy in one of the following ways:
   - From the **System** > **System Files** > **Documentation** menu, select **Help Document Maintenance** to display the Help Document Maintenance screen. In the **Keyword** field enter keywords to search for the document or enter a period (.) followed by the document ID.
   - From the screen to which the F11 help document is attached, press **Shift-F11** to display the Help Topics Maintenance screen. Select the topic you want to copy and use the **Edit Document** hot key.
2. Use the **Copy** hot key.

   The system assigns a new ID number to the displayed document.
3. Edit the **Topic Heading**, **Keywords**, and **Text** fields for the new document, as described in the task for creating F11 help.

   Note the help topic ID number and then press **Esc** to save the F11 help topic.

To edit user-defined F11 help:

1. Display the document you want to edit in one of the following ways:
   - From the **System** > **System Files** > **Documentation** menu, select **Help Document Maintenance** to display the Help Document Maintenance screen. In the **Keyword** field enter keywords to search for the document or enter a period (.) followed by the document ID.
   - From the screen to which the F11 help document is attached, press **Shift-F11** to display the Help Topics Maintenance screen. Select the topic you want to edit and use the **Edit Document** hot key to display the document on the Help Document Maintenance screen.
2. When typing, uploading, or pasting text, be aware that the F9 help screen does not have all the features of a word processor, nor does it work like a typical word processor. Adhere to the following guidelines:
   - Pressing **Enter** within a paragraph does not cause the following text to wrap to the next line.
   - Pressing **Enter** at the end of text does cause the cursor to wrap to the start of the next line.
   - The **Tab** key does not work.
   - The **Backspace** key does not delete text.
   - The **Delete** key works normally.
   - Bullets do not upload as bullets.

- To move text to the next line, press the **Insert** key, place the cursor at the start of the text to be moved, and press the **Spacebar** until the text wraps.
- To insert a blank line between paragraphs, press **Alt-Insert**.
- To remove a blank line, place the cursor in the line and press **Alt-Delete**.
- If you upload text into a Help Document Maintenance screen that contains existing text, the uploaded text will replace everything on the screen.
- When copying and pasting text with Eterm for Windows, you can paste new text at the end of the existing text. Just be sure to position the cursor correctly.

3. Press **Esc** to save the F11 help topic.

To assign user-defined F11 help to a screen:

1. Display the screen to which you want to assign a user-defined help document.
2. Press **Shift-F11** to display the Help Topics Maintenance screen.
3. On a blank line, type the title of your document and press **Enter**.

   Note: To insert a blank line, position the cursor on an occupied line and press **Alt-Insert**.

4. In the **Help Doc #** field, type the number of the document you are assigning and press **Esc**.

   The system assigns your help document and returns you to the program screen.

Viewing User-Defined F11 Help

When you display a screen and press F11, the system displays the online help topic associated with that screen. Before you can display user-defined help topics assigned to a screen instead of the online help topic, you need to remove the pointer to the online help topic.

Use the following procedures to remove a screen's pointer to the online help and view user-defined help assigned to the screen. You can also view user-defined F11 help topics from the Help menu.

To remove a screen's pointer to the online help:

1. From the screen for which you want to remove the pointer to the online help, press **Shift-F11** to display the Help Topics Maintenance screen.

   Note: You must have Superuser authorization to use the **Shift-F11** key.

   This screen lists the user-defined help topics assigned to this screen.
2. Use the **Web Help** hot key to display the Address to Web Help screen.
3. Delete the text displayed on this screen.
4. Press **Esc** two times to exit both screens.

To view user-defined F11 help from the screen to which it is attached:

1. From the screen for which you want to view the user-defined help, press **F11** to display the help topics screen.

   The system lists the help topics assigned to the screen.
2. Select the topic you want to view and press **Enter**.
3. When finished reading the help topic, press **Esc** to exit the help topic and return to the screen.

To view user-defined F11 help from the Help menu:

1. From the **System > System Files > Documentation** menu, select **Help Document Maintenance** to display the Help Document Maintenance screen.
2. In the **Keyword** field, do one of the following:
   - Enter a keyword from the help topic title.
   - Enter a period followed by the document number assigned to the help topic.

   The system displays the help topic or a list of help topics that match your selection criteria.
3. Select the topic to view and press **Enter**.
4. When finished reading the help topic, press **Esc** to exit the help topic.

Order Entry Views Maintenance Overview

Order Entry Body screens display different columns of product information, depending on the selected order entry view. For example, one view shows unit and extended prices, and other views display product availability, shipping details, or backorder details.

In addition to the standard views that come with the system, you can create custom views for specific job functions. For example, for those users who can adjust quotable prices but not vendor prices, you can create a view that displays only a quotable prices column or a view that shows both quotable and vendor prices but allows editing only in the quotable prices column.

By assigning views to users, you can control the information they view and edit. Assign users OE views related to their job functions. To simplify the task of assigning views, you can create OE view templates, which contain groups of OE views. When you assign an OE view template to a user, the user has access to all of the views in the template. In addition to standard OE view templates that come with the system, you can create custom OE view templates.

Both standard and custom OE views are version controlled, as updated by the system. You can only create custom views if you have SUPERUSER authorization. You cannot edit views that are open to another user. Whenever you create or edit views, you must enter a tracker for the update.

Creating Custom OE Views

Use the User Defined Order Entry Views screen to display standard views and create custom views for order entry Body screens. Although you cannot edit standard views, you can copy and rename them. You can then edit the copied views to create custom views. You can also build custom views. If a custom view becomes obsolete, you can delete it.

Order entry views use standard view elements and user-defined view elements. By default, the system assigns two required view elements to OE views: QUANTITY and PRODUCT.DESC. These elements must be included in all views to show item quantity and item descriptions on all orders.

After you create custom views, you can assign them to users or use them to create custom OE view templates.

Due to the nature of the Eclipse display, views for use in Eterm can only be 78 characters wide. You can however build views that are greater than 78 characters wide for use in Solar Eclipse.

Use the following procedures to:

- Create a custom order entry view.
- Copy a view to create a custom order entry view.
- Delete a custom order entry view.

To create a custom order entry view:

1. Display the User Defined Order Entry Views screen in one of the following ways:
   - From the **System** > **System Programming** > **User Defined Functions** menu, select **User Defined OE Views**.
   - From the **Tools > User Defined Documents** menu, select **User Defined OE Views**.
2. In the **View ID** field, enter an ID for the new order entry view. The ID can be up to 20 characters.

   The system prompts you to confirm that this is a new ID.
3. In the **Description** field, enter an informative description of the view. The description can be up to 45 characters.

   This description displays in the list of available views on the order entry screen.
4. In the **Order Type** field, press **F10** and select whether the view applies to sales, purchase, or transfer order entry.
5. In the **Alt Desc** field, indicate whether to display the alternate product description when this view is used. The default value is **N**.
   - **Y –** Displays the alternate product description.
   - **N –** Displays the primary product description.

6. In the **View Element** field, by default, the system assigns two required elements to all order entry views: QUANTITY and PRODUCT.DESC. Do the following, as needed:
   - You can change the value in the **Col Heading** field for QUANTITY. For example, you can name it **Item Quantity**.
   - You can change the values in the **Col Heading** and **Wdth** fields for PRODUCT.DESC. For example, you can name it **Prod Description**.
7. On the next blank line in the **View Element** column, press **F10** to display a list of order view elements and select the next one to display in the view.

   The system populates the **Col Heading**, **Wdth**, **Conv**, **Dcml**, **Just**, **Ovrd**, **Mult**, **Upd**, and **Neg** fields, based on the dictionary item definition.
8. Edit the fields as needed, using the following guidelines:

Field	Guidelines for Editing
Col Heading	A column heading can only be as long as the field width.
Wdth	The width of the column in character spaces. Change the width if necessary. As you build the view, the system tracks and displays the current view width in the **Total Width** field, including space for column separators. The total number of character spaces available for a view in Eterm is 78. However, you can create views that are wider that 78 characters for viewing in Solar Eclipse. If the width is larger than 78, the **Display In** field in the screen header displays **Solar Only**. Any views that is 78 characters or less can be viewed in both Eterm and Solar Eclipse environments.
Conv	Indicates whether a pick output conversion code, which determines the display or report format of the data if the data in this column is numerical, is defined.
Dcml	The number of decimal places to display, if the field is numeric.
Just	Enter **R** or **L** to change the justification of the data in the column to the right or left. Right justify dates and numbers.
Ovrd	Indicate whether to reserve one character of the column width for displaying an override asterisk (*). • **Y** – One character of the column width is reserved for displaying an override asterisk. The designated view column displays an asterisk when overridden. • **N** – Override asterisks never display.
Mult	Indicates whether the column is multi-valued.
Upd	Indicates whether a user can update this column when using this view in order entry. You can only change **Y** values to **N**.
Neg	Indicates whether to allow negative numbers. You can set this field to **Y** only if **R** justification is selected.

9. Use the **Preview** hot key to see the view you have defined.

   You can only preview views that are 78 characters or less.
10. Repeat steps 7 and 8 to add additional elements to the view.
11. Press **Esc** to save the view.

To copy a view to create a custom order entry view:

1. Display the User Defined Order Entry Views screen in one of the following ways:
   - From the **System** > **System Programming** > **User Defined Functions** menu, select **User Defined OE Views**.
   - From the **Tools** > **User Defined Documents** menu, select **User Defined OE Views**.
2. In the **View ID** field, enter an ID to display the view you want to copy.
3. Use the **Copy** hot key to display the following prompt: Enter New ID.
4. At the prompt, enter the new ID. The ID can be up to 20 characters.

   The dictionary items from the copied view populate the screen.
5. Edit the view as needed.
   - Use **Alt-Insert** and **Alt-Delete** to insert and delete lines.
   - Follow the guidelines described in step 8 in the previous task for editing fields.
6. Press **Esc** to save the view.

To delete a custom order entry view:

1. Display the User Defined Order Entry Views screen in one of the following ways:
   - From the **System** > **System Programming** > **User Defined Functions** menu, select **User Defined OE Views**.
   - From the **Tools** > **User Defined Documents** menu, select **User Defined OE Views**.
2. In the **View ID** field, press **F10** and select the view to delete.
3. Use the **Del** hot key. At the prompt, type **delete** and press **Enter**.

Editing Custom OE Views

Edit a custom order entry view when you need to change the data or format of the data displayed in the view.

Custom order entry views are version-controlled. After you update a view, the system opens the view record to your user ID. You can then revise or undo your changes. After you are satisfied with the changes you made, close the view record. The system maintains a log of each new version of the view and who made the changes.

To edit a custom OE view:

1. Display the User Defined Order Entry Views screen in one of the following ways:
   - From the **System > System Programming > User Defined Functions** menu, select **User Defined OE Views**.
   - From the **Tools > User Defined Documents** menu, select **User Defined OE Views**.
2. In the **View ID** field, enter the ID of the order entry view to edit.
3. Edit the view elements as needed.

   See Creating Custom OE Views for field descriptions.
4. Press **Esc** to save the updated view and display the Program Change Log Entry screen.

   This screen displays the name of the file and view updated, along with your user ID, the current date and time, and the view's version number incremented by one.
5. Complete the screen as follows:
   - In the **Comment** field, enter a comment describing the changes you made.
   - In the **Actv Log #** field, enter the number of the tracker that prompted the change. If necessary, press **Shift-F4** and create a tracker assigned to your user ID.
   - Press **Esc** to exit this screen and return to the User Defined Order Entry Views screen.

   Though not displayed, the updated order entry view is now open to your user ID. Other users can view the record, but they cannot edit the record until you close it.
6. Display the updated order entry view record again.

   The screen shows that it is open to your user ID and displays the new version number followed by a modification number. Each time you modify the view while it is open to your user ID, the system increments the modification number.
7. Do one of the following:
   - Make additional changes to the displayed record and press **Esc**. Then return to step 6.

     The system displays a blank User Defined Order Entry views screen; it does not display the Program Change Log Entry screen again. When you display the updated view again, note that the modification number following the version number is incremented by one. This indicates the number of modifications you have made to this screen while it has been open to your user ID.

- If you are satisfied and finished with the changes you made, use the **Close** hot key.

  The system releases the displayed view from its open status and makes an entry in the change log for this new version of the view. Use the **Log** hot key to view the log entries.

- If you are not satisfied with the changes you made, use the **Undo** hot key. Then return to step 6.

  - If the new version contains just one modification, the system displays a prompt similar to the following:

    Undo Ver # 14 for OE.VIEWS~BBGUN1 (Y/N) : N

    Type **Y** to undo the changes you made in the new version or type **N** to exit the prompt.

  - If the new version contains more than one modification, the system displays a prompt similar to the following:

    Undo OE.VIEWS~BBGUN1 - Ver#14/Mod#14[2]/Nothing ? (V/M/N) : N

    Type **V** to undo all of the changes in the new version, type **M** to undo only the most recent modification in the new version, or type **N** to exit the prompt. When you undo a complete version, the view record is no longer open to your user ID.

Creating Custom OE View Templates

An OE view template contains order entry views that have been grouped together by function. For example, the purchase order entry template contains order entry views for purchase orders, stock receipts, and purchasing inquiries. When you assign templates to users, they have access to all of the views in the templates. You can use standard templates or create custom templates.

Although you cannot edit standard OE view templates, you can copy and rename them. You can then edit the copied templates to create custom templates for groups of employees who need specific order entry information.

You can add custom OE views that are wider than 78 characters to a template for users who use Eterm, Solar Eclipse, or both. The users OE view selection list in Eterm includes only the views that are 78 characters or less. However, if the user is in Solar Eclipse, the user can select a view that is wider than 78 characters.

Use the following procedures to:

- Create a custom OE view template.
- Copy a template to create a custom OE view template.

To create a custom OE view template:

1. From the **System > System Programming > User Defined Functions** menu, select **User Defined OE Views** to display the User Defined Order Entry Views screen.
2. Use the **Template** hot key.
3. Select **New** and press **Enter**.
4. At the **Enter New ID** prompt, enter the new template ID. The ID can be up to 20 characters long.
5. At the prompt, enter a description of the template. The description can be up to 30 characters long.

   The Edit OE View Template screen displays.
6. To add a view to the template, on a blank line in the **View Element** column, press **F10** to display the list of views and select one.

   Note: To delete a view, select the view and press **Alt-Delete**.

7. To designate an order entry view as the default for a new, open, or invoiced sales or direct order, in the **Default** field, press **F10** to display the SOE, POE, and TOE order types, and select the default type of order for the designated view.
8. Press **Esc** to save the template.

   Once created, user-defined order entry templates are available for use.

To copy a template to create a custom OE view template:

1. From the **System > System Programming > User Defined Functions** menu, select **User Defined OE Views** to display the User Defined Order Entry Views screen.
2. Use the **Template** hot key and select the template to copy.

   The Edit OE View Template screen for the selected template displays.
3. Use the **Copy** hot key.
4. At the **Enter New ID** prompt, enter the ID of the new template to create.

   The system creates a template with the new ID and the Defined Order Entry Views screen displays. This screen is blank.
5. In the **View ID** field, enter the new template name to display the OE View Template screen for the new template.

   The system populates the screen with the views from the copied template.
6. In the **Template Desc** field, edit the copied description as needed.
7. Do any of the following to edit the views assigned to the template:
   - To remove an entry from the template, press **Alt-Delete**.
   - To insert a blank line, press **Alt-Insert**.
   - To add a view to a blank line, press **F10** to display a list of views and select one.
8. Press **Esc** to save the new template.

Editing Order Entry View Templates

You can edit order entry (OE) view templates to make them match an individual's job functions.

For example, if an employee who is responsible for entering and checking on orders does not need the Audit Pricing view for sales order entry, you can edit the *SOE.ALL view to remove the Audit Pricing view for this employee.

Standard OE view templates are not editable. To create your own templates for groups of employees, copy and rename a standard OE view template and then edit it.

You can add custom OE views that are wider than 78 characters to a template for users who use Eterm, Solar Eclipse, or both. The users OE view selection list in Eterm includes only the views that are 78 characters or less. However, if the user is in Solar Eclipse, the user can select a view that is wider than 78 characters.

To edit OE view templates:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **OE View** hot key to display the OE View Selection screen, which lists the views and templates assigned to this user. The system prefixes template IDs with an asterisk (*).

   Note: You must be assigned the USER.VIEW.SELECT authorization key to access this screen.

4. Position the cursor on a template and use the **Template** hot key to display the Edit OE View Template screen.
5. Do any of the following to edit the template:
   - To add a view to the template, on a blank line, press **F10** and select one from the list. The system displays the ID, order entry type, and description on the OE View Selection screen.
   - To remove a view from the template, select the view and press **Alt-Delete**.
   - To change the template description, use the **Change Template Desc** hot key.
   - To delete the currently displayed template, use the **Delete** hot key. The system prompts you to confirm the deletion.
6. To designate an order entry view as the default for an order type, press **F10** in the **Dflt** field and select one from the list. When the user enters the selected order type, this is the default view. This field applies only to views.
7. Press **Esc** twice to save the template and update the user record.

Assigning Order Entry Views and Templates to Users

Use the OE View Selection screen to assign order entry views and templates to a user.

The sales, purchase, and transfer order entry Body screens display different columns of information, depending on the selected view. Views can show information such as unit or extended prices, product availability, shipping, or backorder details. Since not all views are appropriate for all users, assign each user the order entry (OE) views related to their job function.

OE view templates contain order entry views grouped together by function. For example, *POE.ALL contains all purchase order entry views. View IDs prefixed with an asterisk are OE view templates.

You can add custom OE views that are wider than 78 characters to a template for users who use Eterm, Solar Eclipse, or both. The users OE view selection list in Eterm includes only the views that are 78 characters or less. However, if the user is in Solar Eclipse, the user can select a view that is wider than 78 characters.

To assign order entry views and templates to a user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance screen.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. Use the **OE View** hot key to display the OE View Selection screen, which lists the views and templates assigned to this user. The system prefixes template IDs with an asterisk (*).

   Note: You must be assigned the USER.VIEW.SELECT authorization key to access this screen.

4. To assign a view or template, position the cursor on a blank line, press **F10**, and select a view or template from the list.

   The system displays the view or template ID, order entry type, and description in the OE View Selection screen.

5. Use the **Template** hot key, as needed, to view or edit the views assigned to a template.
6. To designate an order entry view as the default for an order type, press **F10** in the **Dflt ID** field and select one from the list. When the user enters the selected order type, this is the default view. This field applies only to views.
7. Repeat steps 4 and 5 to add additional views or templates to the user's profile.
8. Press **Esc** until the user record has been saved.

   Note: A user to whom you have assigned a new view must log off the system and then log back on before being able to use the view.

Creating Order Entry View Elements

Order entry view elements define the contents of the columns displayed in order entry views. The system includes pre-defined order entry view elements used in the standard Eclipse views. Only installers and designated client personnel should use the Order View Element Maintenance screen to define additional view elements to use in custom order entry views.

You can create the following two types of order entry view elements:

- Dictionary item.
- Custom.

  Note: Only Eclipse programmers should create custom order entry view elements.

To use a dictionary item as an order view element:

1. From the **Tools** menu, select **Order View Element Maint** to display the Order View Element Maintenance screen.
2. In the **ID** field, enter an identifier for the view element.

   Note: To display an existing element, press **F10** and select the element from the list.

3. Enter an asterisk (*) in the **Dict Info Only** field.
4. In the **From File** field, press **F10** and select the file in which the dictionary item is located.
5. In the **Dictionary ID** field, press **F10** and select the dictionary item.
6. In the **Dictionary Key** field, press **F10** and select the order element to use as the key to access this dictionary item.
7. Press **Esc** to save the record and exit the screen.

   Note: When you assign a dictionary item to an order entry view element, you do not need to complete any other fields on this screen. The system uses the display and update information defined for the dictionary item in Dictionary Maintenance.

To create a custom order view element:

1. From the **Tools** menu, select **Order View Element Maint** to display the Order View Element Maintenance screen.
2. Complete the following fields in the Non-Dictionary Information area of the screen.

Field	Description
Description	Enter the description to display as the default column heading for this element.

Field	Description
Verification	Enter the subroutine to use to validate data entered for this element, if necessary.
Conversion	Enter the pick output conversion code, which determines the display or report format of the data stored in this element.
Decimal Places	Enter the number of decimal places to display, if this element is numeric.
Justification	Enter **R** or **L** to specify the justification of the data in the column as right or left. Right justify dates and numbers.
Allow Negative	Indicate whether to allow negative numbers. You can only allow negative numbers for right justified fields. • **Y** – Allows negative numbers. • **N** – Does not allow negative numbers.
Show For Comments	Indicate whether to display the contents of this view element on comment lines in the order. • **Y** – Displays for order line items and comment lines. • **N** – Displays for order line items only.
Blank View	Indicate whether the view element displays data in the view. The default is **N**. • **Y** – The view element does not display data in the column of the view to which you assign it. The system populates the display **Subroutine** field with the OE.VE.DISP.BLANK subroutine. • **N** – The view element displays data in the column of the view to which you assign it.
Multi-line	Indicate whether this element displays on multiple lines.
Override Flag	Indicate whether to reserve one character of the column width for displaying an override character. • **Y** – One character of the column width is reserved for displaying an override character. • **N** – Override characters never display.

3. Complete the following fields in the Display Information area of the screen.

Field	Description
Subroutine	Identify the subroutine that calculates the display information for the view element.
Parameter	If the subroutine performs multiple functions, enter the modifier used to select the function that will display this view element.

4. Complete the following fields in the Update Information area of the screen.

Field	Description
Subroutine	Identify a subroutine to be used to process the data entered from a screen to update the view element.
Parameter	If the subroutine performs multiple functions, enter the modifier used to select the function that will update this view element.

Field	Description
Edit Paid Direct	Indicate whether this element is editable on the sales order portion when the purchase order portion of a direct order has been paid. • **Y** – Editable. • **N** – View-only.

5. Press **Esc** to save the record and exit the screen.

Editing Order Entry View Elements

Order view elements are version-controlled. After you update an element, the system opens the element record to your user ID. You can then revise or undo your changes. Once you are satisfied with the changes you made, close the element record. The system maintains a log of each new version of the element definition and who made the changes.

To edit an order entry view element:

1. From the **Tools** menu, select **Order View Element Maint** to display the Order View Element Maintenance screen.
2. In the **ID** field, press **F10** and select the order view element you want to edit.
3. Edit the view element as needed.

   See Creating Order Entry View Elements for field descriptions.
4. Press **Esc** to save the updated element and display the Program Change Log Entry screen.

   This screen displays the name of the file and element updated, along with your user ID, the current date and time, and the view's version number incremented by one.
5. Complete the screen as follows:
   - In the **Comment** field, enter a comment describing the changes you made.
   - In the **Actv Log #** field, enter the number of the tracker that prompted the change. If necessary, press **Shift-F4** and create a tracker assigned to your user ID.
   - Press **Esc** to exit this screen and return to the User Defined Order Entry Views screen.

   Though not displayed, the updated order entry view is now open to your user ID. Other users can view the record, but they cannot edit the record until you close it.
6. Display the updated order view element record again.

   The screen shows that it is open to your user ID and displays the new version number followed by a modification number. Each time you modify the element while it is open to your user ID, the system increments the modification number.
7. Do one of the following:
   - Make additional changes to the displayed record and press **Esc**. Then return to step 6.

     The system displays a blank Order View Element Maintenance screen; it does not display the Program Change Log Entry screen again. When you display the updated view again, note that the modification number following the version number is incremented by one. This indicates the number of modifications you have made to this screen while it has been open to your user ID.
   - If you are satisfied and finished with the changes you made, use the **Close** hot key.

The system releases the displayed element record from its open status and makes an entry in the change log for this new version of the element definition. Use the **Log** hot key to view the log entries.

- If you are not satisfied with the changes you made, use the **Undo** hot key. Then return to step 6.
  - If the new version contains just one modification, the system displays a prompt similar to the following:

    Undo Ver # 14 for OE.VIEWS~BBGUN1 (Y/N) : N

    Type **Y** to undo the changes you made in the new version or type **N** to exit the prompt.
  - If the new version contains more than one modification, the system displays a prompt similar to the following:

    Undo OE.VIEWS~BBGUN1 - Ver#14/Mod#14[2]/Nothing ? (V/M/N) : N

    Type **V** to undo all of the changes in the new version, type **M** to undo only the most recent modification in the new version, or type **N** to exit the prompt. When you undo a complete version, the view record is no longer open to your user ID.

Customer and Vendor Standard Notes Overview

Use customer and vendor standard notes to create company-wide shipping instructions, such as "Call job site before scheduling delivery or material will be refused," or company-wide internal notes, such as "Check recent price updates."

Order writers can attach these notes to an order to ensure that all transaction requirements are met.

For example, a customer requires a call to schedule delivery of product. Attach the standard shipping note "Call job site before scheduling delivery or material will be refused" to the customer's sales order. The shipping ticket for that customer displays the note. The note reminds the person in charge of delivery of the customer's requirements.

See Also:

Creating and Editing Customer and Vendor Standard Notes

Creating and Editing Customer and Vendor Standard Notes

Use the Customer/Vendor Standard Notes program to create and edit company-wide notes to apply to orders. You can create the following types of notes:

- Customer Standard Shipping Instructions
- Customer Standard Internal Notes
- Vendor Standard Shipping Instructions
- Vendor Standard Internal Notes

Create these notes as reminders of transaction requirements. Order writers can then use the **Notes** or **Shipping Instructions** hot keys to attach these notes to orders from the order's Header screen.

Use the following procedures to:

- Create customer or vendor standard notes.
- Edit customer or vendor standard notes.

To create a new customer or vendor standard note:

1. From the **System > System Files > Customer/Vendor Control > Customer/Vendor Standard Notes** menu, select the type of note to create to display a screen listing all the note titles currently defined for that type.
2. Select **** NEW NOTE **** and press **Enter** to display the Note Title screen.
3. Enter a title for the note and press **Esc** to display the screen for that note title.
4. Enter the text of the note and press **Esc**.
5. Press **Esc** to return to the **Customer/Vendor Standard Notes** menu.

To edit a customer or vendor standard note:

1. From the **System > System Files > Customer/Vendor Control / Customer/Vendor Standard Notes** menu, select the type of note you want to edit to display a screen listing all the note titles currently defined for that type.
2. Position the cursor on the note to edit and press **Enter** to display the screen for the selected note title.
3. Edit the note as follows:
   - To change the text, type over the existing text or add text to the end of the note. Press **Esc** to save your changes.
   - To change the title, use the **Edit Title** hot key. Type over the existing title and press **Esc** to save your changes.

- To delete the note, use the **Delete Note** hot key. Enter **Y** at the prompt to confirm your deletion.

4. Press **Esc** to return to the **Customer/Vendor Standard Notes** menu.

Business Closed Days Overview

Use the Business Closed Days Maintenance program to create a list of dates when your business is closed. The system uses this list when calculating a product's availability date.

Create the business closed days list as far as you want into the future. These days do not affect the plenty date calculation.

Creating a List of Closed Days

When creating a list of closed days, we recommend that you:

- First, create a list of all special days that your business is closed, for example, holidays or a day when your business is closed for inventory. Enter these days in the Business Closed Day screen, chronologically.
- Then, use the Date Scheduler screen to add the days of the week that your business is normally closed, for example, Saturday and Sunday. The system creates a list of all of the closed days and places the special days in the proper sequence.

If you reverse this process, you must advance through the list and insert each special closed day in the proper sequence.

Editing a List of Business Closed Days

You can add new dates to the business closed days list at any time. The system requires that you add the date in the proper sequence on a blank line. You can type over a date provided the revised date is still in the proper sequence. Otherwise, you need to delete the old date and then add the revised date in the appropriate location.

For example, you set up New Year's Day and the day after as closed days and then decide to change the closed days to New Year's Day and the day before. To do this, delete the entry for January 2nd and then insert a new line before January 1st and create an entry for December 31st.

Identifying Business Closed Days

Use the Business Closed Days screen and Date Scheduler screen to create a list of all special days, such as holidays, and normal days, such as Saturday and Sunday, that your business is closed.

After creating a list, you can also edit it as necessary, on the Business Closed Days screen and Date Scheduler screen.

Use the following procedures to:

- Create a list of business closed days.
- Edit a list of business closed days.

To create a list of business closed days:

1. From the **System > System Files** menu, select **Business Closed Days Maintenance** to display the Business Closed Days screen.
2. On a blank line in the **Date** column, enter the first date from your list of special closed days. The system populates the **Day** field with the corresponding day of the week.
3. Enter the remaining special closed dates, as described in the previous step, in chronological order.
4. Use the **Add** hot key to display the Date Scheduler screen.
5. Enter the **Starting Date** and **Ending Date** to designate the time period.
6. Next to the days that your business is normally closed, enter an asterisk (*).

   For example, if your company is closed on weekends, enter asterisks next to Saturday and Sunday. If it is closed only on Sunday, just flag Sunday.
7. Flag the **Weekly** field by entering an asterisk (*) next to the field.

   Note: The **Daily** and **Bi-Weekly** fields are not typically used with the Business Closed Days screen.
8. Press **Esc** to save the schedule and return to the previous screen.

   The system adds the designated closed days to the schedule.
9. Press **Esc** to save the Business Closed Days schedule.

To edit a list of business closed days:

1. From the **System > System Files** menu, select **Business Closed Days Maintenance** to display the Business Closed Days screen.
2. To add a date to the list, do the following:
   - Position the cursor on the date that follows the date to enter. For example, to insert a date between 01/01/04 and 5/24/04, position the cursor on 05/24/04.

- Press **Alt-Insert**.
- Type the date.
- Press **Enter** to add the date to the list.

Note: If you add a date to an existing list and do not insert a blank line at the cursor position, the date you enter replaces the date at the cursor. If the date you enter is out of sequence in the list, a message notifies you that the date must fall between the date above and the date below the cursor.

3. To delete a date, position the cursor on the date and press **Alt-Delete**.
4. To clear all dates from the list, use the **Clear** hot key.
5. Press **Esc** to save your changes.

Area Code Updating Overview

Use the Area Code Updating program to keep area codes current in the system.

If, for example, in Colorado, Denver and Colorado Springs share the same area code, and the state assigns a new area code to the Colorado Springs region, you can use this program to change the area code for all of the affected telephone numbers at once.

When you update area codes, select whether to change the area codes for entities (customer or vendor businesses) or contacts (customer or vendor personnel within individual companies). Then specify all the exchanges within the old area code that need to be updated to the new area code. The exchange is the middle part of the phone number. For the phone number 720-555-8742, 555 is the exchange.

Changing Telephone Area Codes

Use the Area Code Updating screen to change area codes for selected entities and contacts in your company.

To change telephone area codes:

1. From the **System > System Files > Customer/Vendor Control** menu, select **Area Code Updating** to display the Area Code Updating screen.
2. In the **Update** field, press **F10** and select whether to update telephone numbers in the Entity file, Contact file, or both.
3. In the **Old Area Code** field, enter the area code to change.

   Note: To change multiple old area codes, use the **Multi Old AC** hot key. When you specify multiple area codes, *Multi* displays in the field.
4. In the **New Area Code** field, enter the new area code.
5. In the **State** field, enter the abbreviation of the state to which these area codes apply.
6. In the **Affected Exchanges** field, enter the three-digit exchanges for which to change the area code.

   The exchange is the middle part of the phone number. For example, in the phone number 720-555-8742, 555 is the exchange.

   For each exchange, position the cursor on a blank line and type the three-digit number.
7. Use the **Begin** hot key to process the area code change.
8. To change the area code for other exchanges, repeat the previous steps.
   - Use the **Change New AC** hot key to change the value in the **New Area Code** field.
   - Use the **Clear Exchanges** hot key to clear the list of exchanges.
9. Press **Esc** to save the changes and exit the screen.

Music Composer Overview

In User Maintenance you can assign a musical tune to alert the designated user of incoming messages, job queue entries, or the completion of spooler activity. The system provides several standard tunes.

You can also compose your own musical scores and assign these to your user ID. Use the Music Composer program to define new music scores.

To compose music, you need to know the score, which consists of:

- Music notes.
- Each note's octave.
- Each note's count.

If you do not have sheet music available to work from, the Music Composer screen provides an image of a keyboard. The keyboard's keys are labeled for you to work from in creating a score. You must determine each note's count on your own.

Creating Message Tunes

Use the Music Composer to create tunes to alert users to messages. Supply the requested information in the **Octave**, **Duration**, and **Tempo** fields, and then compose the tune in the **Score** field.

You cannot add rests to a tune; it is a continuous string of notes.

Use the following procedures to:

- Create a message tune.
- Delete a message tune.
- Edit the score of a message tune.

To create a message tune:

1. From the **System > System Files > User Control** menu, select **Music Composer** to display the Music Composer screen.
2. In the **ID** field, enter an ID for your musical score.
3. In the **Title** field, type the title of the tune.
4. In the **Octave** field, enter the default tone of the musical interval. For example, how high or low in pitch the tone is played.
5. In the **Duration** field, enter the default length of time each note plays.
6. In the **Tempo** field, enter the speed at which the piece plays.
7. Enter the corresponding letters for the notes of your musical composition. Each note contains three characters:
   - The first character represents a note in the musical scale on a piano. Upper case letters represent white keys and lower case letters represent black keys.
   - The second character represents the octave in which the note occurs.
   - The third character represents the duration of the note.

   Note: The system enters the last two digits for each note. You cannot change the octave or duration until you have saved the score. If you attempt to do it now, the system deletes the note.

   For example, enter the beginning notes of the ball game tune as follows:

   C44 C44 A44 G44 E44 G44 D44 C44 C44 A44 G44 E44
8. Press the **Enter** key to save the score.
9. Use the **Edit** hot key to adjust the octave and duration of the notes.
10. Use the **Play** hot key to play the tune.

11. Repeat steps 9 and 10, as needed.
12. Press **Esc** to save the tune and exit the Music Composer screen.

To delete a message tune:

1. From the **System > System Files > User Control** menu, select **Music Composer** to display the Music Composer screen.
2. In the **ID** field, enter the ID of the tune to delete.
3. Use the **Delete** hot key.

   The system prompts you to confirm the deletion.
4. Press **Esc** to exit the Music Composer screen.

To edit the score of a message tune:

1. From the **System > System Files > User Control** menu, select **Music Composer** to display the Music Composer screen.
2. In the **ID** field, enter the ID of the tune whose score to edit.
3. Use the **Edit** hot key to position the cursor in the **Score** field in edit mode.

   Note: To change the octave, tempo, or duration, you need to delete the tune and create a new one.
4. Edit your musical composition. Each note contains three characters:
   - The first character represents a note in the musical scale on a piano. Upper case letters represent white keys and lower case letters represent black keys.
   - The second character represents the octave in which the note occurs.
   - The third character represents the duration of the note.

   For example, change the beginning notes of the ball game tune as follows:

   C44 C52 A42 G42 E42 G46 D46 C44 C52 A42 G42 E42
5. Press **Enter** to save the new score.
6. Use the **Play** hot key to play the new score.
7. If further editing is required, repeat steps 3 through 6.
8. Press **Esc** to save the tune and exit the Music Composer screen.

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