Eclipse Scheduler and Messaging

Release 8.6.2 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.2 Online Help System

Publication Date: December 10, 2007

Table Of Contents

Scheduler and Messaging Systems Overview

Use the Scheduler and Messaging Systems to interact and communicate with other users.

Scheduler

Use the Scheduler to plan your events and tasks, view other users' schedules, and schedule events for multiple users without imposing on individual schedules.

You can schedule repeating events. The system places the repeating event on the system calendar.

You can set up alarm messages for events. The system sends these messages to all users attending the event at an indicated time prior to the event. For example, you schedule a company meeting. You can set up the alarm to notify all users 15 minutes before the meeting starts.

Messaging System

Use the Messaging System to send messages to and receive messages from other users. In the Messaging System, you can also send and receive reminders of events and trackers, send messages to groups of users at one time, and view who is currently logged in to the system.

See Also:

Scheduler Overview

Message System Overview

Setup Requirements for the Scheduler and Messaging Systems

Following are the control maintenance records and authorization keys used for the Scheduler and Messaging system, along with additional setup requirements.

Control Maintenance Records

Following are the control maintenance records used for the Scheduler and Messaging system.

GENRL Scheduler Parameters

Set the following control maintenance records:

- Check Scheduler On Login
- Daily Schedule Default Hours
- Default Scheduler Alarm Time
- Old Set System Time Zone
- Prompt for Scheduler Closing Notes
- Scan For Scheduling Messages Every: (Seconds)
- Scheduler Activity Notes
- Valid Scheduler Priorities

SFA Scheduler Parameters

Set the following control maintenance records:

- Valid Scheduler Statuses
- Valid Scheduler Types

GENRL MSGS (Messages)

Set the following control maintenance records:

- Days Before Messages Purged
- Maximum Number of Messages
- Valid Languages

EMSG (Eclipse Messaging)

Set the following control maintenance record:

- Valid Message Group Types

Authorization Keys

Following are the authorization keys used for the Scheduler and Messaging Systems.

Daily Planner

Assign the following authorization keys:

- DAILY.PLANNER
- SCHEDULER

Message Group

Assign the following authorization keys:

- MESSAGE.GROUP
- MESSAGE.GROUP.TYPES

User Maintenance

Refer to User Maintenance for information entering user scheduler parameters and assigning users to message groups.

See Also:

Scheduler and Messaging Systems Overview

Scheduler Overview

Use the Scheduler to maintain a calendar of events for yourself. You can also view other users' schedules and schedule events and meetings for multiple users.

> **Note:** The Scheduler in the Sales Force Automation companion product is compatible with the core product Scheduler. Information can be synchronized between the two schedulers.

Use the following applications in the Scheduler:

- Daily Planner – Use to view users' short descriptions of their work schedules for the week.
- Daily Schedule – Use to maintain a calendar of scheduled events on a daily basis. If authorized, you can use to view and edit other users' schedules.
- Weekly Schedule – Use to view a user's weekly schedule.
- Schedule Detail Maintenance – Use to enter detailed information for an event, such as a meeting agenda and public or private notes. You can also use this function to set an event to be repeating, as well as send an alarm message to all attendees prior to the event.
- Meeting Advisor – Use to schedule meetings. The Meeting Advisor checks each user's schedule and indicates times when all users are available for a meeting.
- Event Tracking Report – Use to summarize schedules for users.

See Also

Scheduler and Messaging Systems Overview

Viewing the Daily Planner

The Daily Planner displays employee work schedules. Use the Daily Planner to view a week at a time and plan events based on more than one user's schedule for a larger period of time, such as a two-day planning session or to quickly look ahead for all users. Use this screen to inform other employees about your work schedule. For example, you can indicate your location, the hours you'll be in the office, when you have a dentist appointment, or the client you are visiting on a business trip. You can also view at a glance the work schedule for other employees. The information entered in the Daily Planner for the current date displays on the Messaging screen for the user.

The Daily Planner lists the users in a selected message group. The user IDs for the group are displayed in the **User** column on the left. The columns to the right show a brief description of the activities or location for each user on the designated days. You can view any group. The default group is your own. However, when you exit this screen, the system stores the currently selected group as your default.

Use the Check Scheduler On Login control maintenance record to indicate if you want to display the planner or scheduler when a user logs in to the system. You can enter your schedule in advance on the Daily Planner screen or, if set, when prompted at login. The first 11 characters of your entry display on the Daily Planner screen. Use the **Expand** hot key to enter or view a longer description.

You must be assigned the DAILY.PLANNER authorization key to use the Daily Planner. The assigned level determines your ability to view and edit your own and other users' schedules.

To view the Daily Planner:

1. From the **System > Scheduler** menu, select **Daily Planner** to display the Daily Planner screen.

   Your default group displays. The Group ID displays in the **Group** field.
2. Use the **Group** hot key to activate the **Group** field.
3. In the **Group** field, enter the Group ID you want to view. Press **F10** and select from a list.
4. Use the **Find** hot key to display the **Find User ID** prompt when a list is too long to display in the viewable area.
5. Use the **Expand** hot key to view descriptions that are longer than 11 characters.
6. Use the following keys to view different dates displayed on the screen:
   - **Tab –** Move to future dates.
   - **Shift-Tab –** Move to prior dates.
   - **As of Date –** Jump to an indicated date. At the prompt, enter the date. Then the system displays that date and the four following dates on the screen.
7. Press **Esc** to exit the daily planner.

To make an entry for your user ID:

1. From the **System > Scheduler** menu, select **Daily Planner** to display the Daily Planner screen.
2. On the Daily Planner screen, locate your ID.
3. Position the cursor on the date for which you want to make the entry.
4. Enter your work schedule in the field.
5. Use the following hot keys, as necessary:

Hot Key	Function
Clear	Erases a previous entry.
Expand	Expands an entry longer than 11 characters. Press **Esc** to return to the Daily Planner screen.
Copy	Copies an event to other dates. To fill in a series of dates with the same entry, position the cursor on the entry to be copied. Use the hot key. The system prompts you to enter the number of days to copy the entry to. Enter this number and press **Esc** to copy the event.

6. Press **Esc** to save the updated information and exit the Daily Planner.

See Also:

Scheduler Overview

Viewing Daily Schedules

Use the Daily Schedule program to plan meetings on a daily basis or to schedule your time as busy so you cannot be scheduled for other events. For example, you have a project you need to finish in the morning. You schedule yourself for Project A from 8:00am to 11:00am to avoid others scheduling you for events during that time.

Also, you can check other user's schedules before creating a meeting. For example, you need to plan a meeting on Thursday or Friday. You must have LindaR at the meeting. You can check her individual schedule to see which day is best for the meetings.

To view your daily schedule:

1. From the **System** > **Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.

   - The system displays the screen with the cursor in the **Start** column and the following information in the header:

Field	Description
User	Your user ID. If authorized, you can view and edit the daily schedule of another user by changing the user ID in this field. **Note:** The system uses the current owner when creating a new event.
Date	Current date. You can change the date in any of the following ways: • Use the **Goto** hot key. The system places the cursor in the **Date** field. Press **F10** and select another date. • Use the **Today** hot key to view the schedule for the current date. • Click a date displayed in one of the calendars on the left side of the screen.
Time Zone	Time zone defined in User Maintenance for the displayed user ID.

   - The selected day's schedule displays on the right side of the screen, showing the following information for each scheduled event:

Field	Description
C	Indicates whether the respective event is complete (marked by an asterisk), or incomplete (left blank).
A	Indicates whether the user is able to attend the respective event. • **Y** – The user can attend. • **N** – The user cannot attend. • **?** – Unknown whether the user can attend.
Start	Displays starting time for the respective event.
End	Displays ending time for the respective event.
Event Description	Displays description of the event.

Note: When viewing your own schedule, you can update these fields.

2. Use the hot keys as needed:

Hot Key	Function
< Change Month >	Changes the two monthly calendars displayed on the left side of the screen. • < moves back one month • > moves forward one month.
Detail	Use to view or enter detail information about the event.
Weekly	Use to view a user's weekly schedule of events.
Change View	Changes the view of the Daily Schedule screen, by moving the **Start** and **End** columns to the right of the screen. Use the hot key again to change back to the default view.
View	Accesses cross-reference information for the event, such as trackers or customers identified in the event detail.
Meeting Adv	Use to schedule a meeting.

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

See Also:

Scheduling Events

Viewing Weekly Schedules

Scheduler Overview

Viewing Weekly Schedules

Use the Weekly Schedule screen to view weekly schedules.

This screen is view only. You can only edit schedules from the Daily Schedule screen and the Schedule Detail Maintenance screen.

To view weekly schedules:

1. From the **System** > **Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.

   The system displays the current day's events scheduled for your user ID.

2. Use the **Weekly** hot key to display the Weekly Schedule screen.

   In the **Weekly Schedule** field, the system displays your user ID and your schedule for the week.

   Use the **Change User** hot key to view a user's schedule other than your own. At the prompt, enter the user ID of the person whose schedule you want to view.

3. Use the **Arrow** keys to view earlier or later time slots than the times displayed.
4. To change the view, do one of the following:
   - Use the **7 Day View** hot key to view a Sunday through Saturday calendar instead of the Monday through Friday calendar.
   - Use the **5 Day View** hot key, which changes from **7 Day View**, to return to the Monday through Friday view.
5. Use the following hot keys as needed:

Hot Key	Function
Detail	Displays the Schedule Detail Maintenance screen for the task on which you have placed the cursor.
Daily	Displays the Daily Schedule screen for the day on which you have placed the cursor.

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

See Also:

Viewing Daily Schedules

Scheduling Events

Scheduler Overview

Event Tracking Report

Use the Event Tracking Report to summarize completed events. You can select and sort the events to be included in the report based on:

- Event dates.
- Users who scheduled the events.
- Entities associated with the scheduled events.
- Event types.

You can include, exclude, or run the report for only completed events.

To run the Event Tracking Report:

1. From the **System > Scheduler** menu, select **Event Tracking Report** to display the Event Tracking Report screen.
2. In the **Start Date** field, enter the date to start selecting events to include in the report. You can enter a calendar date or a variable date. This field is required.
3. In the **End Date** field, enter the date to stop selecting events to include in this report. You can enter a calendar date or a variable date. This field is required.
4. In the **User** field, enter the ID for whom to run the report. Leave this field blank to select events scheduled for all users.

   Use the **Users** hot key to select events scheduled for multiple users. When multiple users are selected, *Multi* displays in the **User** field.
5. In the **Entity** field, enter the ID of the entity for which to run the report. Leave this field blank to select events scheduled for all entities.

   Use the **Entities** hot key to select events associated with multiple entities. When multiple entities are selected, *Multi* displays in the **Entity** field.
6. In the **Event Type** field, enter the event type for which to run the report. Leave this field blank to select events scheduled for all types of event.

   Use the **Events** hot key to select events associated with multiple types. When multiple event types are selected, *Multi* displays in the **Event Type** field.
7. In the **Sort by** field, press **F10** and select one of the following options:
   - **User**
   - Entity
   - Date/Time
   - Event Time

8. In the **Completed (Inc/Exc/Only)** field, indicate whether to include, exclude, or list only completed events for the report.
9. Set options, if needed, and generate the report.

See Also:

Scheduler Overview

Scheduling Events

The scheduler provides different ways to enter and edit events for which you need to set aside time.

You must have authorization to edit events. Generally, when you schedule an event that affects other users, only you can edit or delete that event. However, if you have permission you can edit and delete events of which you are not the owner.

You have different options for scheduling events:

- Option 1: You can display your schedule for a designated day on the Daily Schedule screen and then enter the new event.

  From the Daily Schedule screen, use the Schedule Detail Maintenance screen to enter additional detail information about the event. For example, you can:

  - Enter a more detailed description of the event.
  - Set an alarm for the event.
  - Schedule the event as a repeating event.
  - Enter public and private notes.
  - Indicate if you want to prompt the user for closing notes when an event is complete.

- Option 2: You can schedule a new event directly from the Schedule Detail Maintenance screen.

  In this case, you do not have the advantage of viewing your currently scheduled events before scheduling a new one.

Use the Default Scheduler Alarm Time control maintenance record to define the default when the user is reminded about the event.

To schedule events using the Daily Schedule screen:

1. From the **System > Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.

   The system displays the current day's schedule for your user ID. Change the date, as necessary.

2. In the **Start** column, position the cursor on a blank line and enter the starting time for the event, followed by an **a** for a.m. or a **p** for p.m.

   The system populates the end time as one hour after the start time.

3. In the **End** column, edit the ending time of the event, as necessary.

   Note: Use **Alt-Insert** to add an event before or after currently scheduled events.

4. In the **Event Description** field, enter a description of the event.

   Note: The system limits the display to 45 characters.

   The system populates the **A** column with **Y** to indicate that you will attend this event.

   - Edit this column by placing the cursor on the **Y** and pressing **F10**. Select an option from the displayed list.
   - To mark an event as complete, place the cursor in the **C** column for the respective event and enter an asterisk (*****). You can un-mark an event as complete by deleting the asterisk.

5. Use the **Detail** hot key to enter detail information about the event.

   Note: Use **Alt-Delete** to remove an event from the schedule.

6. Press **Esc** to exit the screen and save the changes made to the schedule.

To schedule events using the Schedule Detail Maintenance screen:

1. From the **System > Scheduler** menu, select **Detail** to display the Schedule Detail Maintenance screen.

   Note: You can also use the **Detail** hot key on the Daily Schedule screen.

2. In the **Event ID** field, enter an event ID to call up event details or type **New** for the system to assign a new event and ID.

   The system also enters your user ID in the **Owner** field and your defined time zone in the **Time Zone** field.

3. Enter the following information:

Field	Description
Description	The event description. **Note:** The system limits the display to 45 characters.
Date	The date for which to schedule the event.
Start Time	The starting time of the event in the specified time zone.
End Time	The ending time of the event in the specified time zone.
Location	The location of the event, such as the conference room name.

4. Enter event detail information as needed.

5. Use the **Complete** hot key to close the event.

   Note: If the Prompt For Scheduler Closing Notes control maintenance record is set to **Yes**, the Closing Notes screen displays.

6. Press **Esc** to add the event to the Daily Schedule and exit the screen.

Changing Event Attendance

When another user schedules you for an event, by default the system assigns the attendance status of Unknown. You can change your attendance availability, if needed.

To change event attendance:

1. From the **System > Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.

   The system displays the current day's schedule for your user ID. Change the date, as necessary.
2. Display a previously scheduled event.
3. Use the **Detail** hot key to display the Schedule Detail Maintenance screen.
4. Tab to the **Attend** field and update your attendance. You can use the **Users** hot key to place the cursor in this field.

   If you select yes, the system considers you unavailable for other events during the specified time. If you select no, the system considers you available for other events the specified time.
5. Press **Esc** to save your changes and exit the screen.

See Also:

Entering Detailed Information for an Event

Deleting and Rescheduling Meetings

Entering Detailed Information for an Event

Use the Schedule Detail Maintenance screen to enter detailed information about an event or meeting. For example, you can:

- Enter an agenda for a meeting.
- Enter a more detailed description of the event.
- Set an alarm for the event.
- Schedule the event as a repeating event.
- Enter public and private notes.

To enter detailed information for an event:

1. From the **System** > **Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.
2. Schedule an event or display a previously scheduled event.
3. Use the **Detail** hot key to display the Schedule Detail Maintenance screen.

   Note: You can also access the Schedule Detail Maintenance screen by selecting **Detail** from the Scheduler's main menu. If you access the screen from the Scheduler's main menu, you must create a new event or know the ID assigned to the event.

   The system displays the following information taken from the Daily Schedule screen:

Field	Description
Event ID	Enter an event ID to call up event details or type New for the system to assign a new event and ID.
Owner	User who entered the event on the Daily Schedule screen.
Time Zone	Time zone for the event owner, as defined in User Maintenance.
Description	Event description.
Date	Scheduled date for the event.
Start Time	Starting time of the event in the specified time zone.
End Time	Ending time of the event in the specified time zone.
Location	Meeting room for the event.
Attendance	Whether the event owner will attend the event, indicated by: **Yes**, **No**, or **Unknown**.

   Note: Except for the **Event ID** field, you can edit these fields, as necessary.

4. In the **Completed** field, enter an asterisk (*****) to flag an event as complete.
5. In the **Type** field, press **F10** and select a pre-defined event type to assign to the event, as needed.

6. In the **Access** field, press **F10** and select whether the information about this event is available to:
   - **Public** – All authorized users.
   - **Private** – Only the owner of the event.
7. In the **Alarm** field, enter the amount of time prior to the event start time when you want the system to send a message reminding you that this event is on your schedule. The default is **Disabled**, meaning the system does not send an alarm message. The system determines the default by the Default Scheduler Alarm Time control maintenance record.

   If you enter a time, press **F10** to select one of the following options:

Option	Description
Minutes	The system sends an alarm message the designated number of minutes before the event.
Hours	The system sends an alarm message the designated number of hours before the event.
Days	The system sends an alarm message the designated number of days before the event.
Disabled	Deactivates the alarm.

8. Use the following fields for entering notes:

Field	Description
Public Notes	Notes for the event that you want to make accessible to all authorized users, such as a meeting agenda. The system displays an asterisk (*****) in the **Notes** column next to any user who entered notes. Use the **Notes** hot key to display these notes.
Private Notes	Notes for the event only you can view.

9. Populate the following fields to schedule users for the event:

Field	Description
Users	All users for whom this event is scheduled. • Enter additional user IDs if you want to schedule the event for additional users. • Use the **Users** hot key to quickly place the cursor in the **Users** column.
Attend	Lists if the users identified in the Users column are required to attend. Select one of the following: • Yes • No • Unknown The system displays **Unknown** when you add new users to the event. **Note:** You can only update this field for your own user ID.

10. Use the hot keys to perform the following functions:

Hot Key	Description
Repeating	Displays the Repeating Schedule screen, where you can create a repeating event that the system adds to your calendar at the defined times.
Users	see Users field above.
Add'l	Displays the Additional Event Details screen. For more information, see Entering Additional Event Details.
New	Clears the Schedule Detail Maintenance screen, so you can create a new event.
Delete	Deletes the currently displayed event. The system prompts you to confirm the deletion. If you are deleting an event that was set up to repeat, the system displays the additional prompt **This event repeats. Delete current day or all?** Press **F10** and select whether to delete the event for the current day or all days.
View	Provides access to cross-reference data, such as customer maintenance, for the event.
Meeting Adv	Displays the Meeting Advisor screen, which you can use to schedule meetings.
Xref	Displays the Event Cross-Reference screen. Use this screen to reference contacts, products, trackers or other entities with the scheduled event.
Notes	Displays all the notes, which are not private, for the event entered by attendees.
Complete	Closes the event.
Tracker	Displays a list of all entities and users associated with the schedule. Selecting a user/entity automatically opens a tracker associated with that user/entity.

11. Press **Esc** to save the details and return to the Daily Schedule screen.

See Also:

Scheduling Events

Scheduling Repeating Events

Scheduling Meetings

Scheduler Overview

Entering Additional Event Details

Use the Additional Event Details screen to indicate how the system should handle the events scheduled for you.

To enter additional event detail information:

1. From the **System > Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.
2. Schedule an event or display a previously scheduled event.
3. Use the **Detail** hot key to display the Schedule Detail Maintenance screen.

   Note: You can also access the Schedule Detail Maintenance screen by selecting **Detail** from the Scheduler's main menu. If you access the screen from the Scheduler's main menu, you must create a new event or know the ID assigned to the event.

4. Use the **Add'l** hot key to display the Additional Event Details screen.
5. In the **The meeting scheduler should treat this event as** field, press **F10** and select one of the following:
   - **Busy** – Marks the time slot as busy and alerts users when they want to schedule an event with you.
   - **Available** – Marks the time slot as available for scheduling events.
   - **Informative** – Indicates the event is just for information, such as In Boulder Office.
6. In the **This event should be displayed on which view** field, press **F10** and select either **Daily and Calendars** or **Daily Only** to indicate where the event should appear in the system.
7. In the **Use this as a Daily Planner description** field, indicate if you want to use the event description in the daily planner view. The default is **No**.
8. In the **Enable Attendance Notification Messages** field, indicate if you want to notify the users on the event each time a change is made to the event. The default is **No**.
9. Press **Esc** to save your changes and return to the Schedule Detail Maintenance screen.

Scheduling Repeating Events

You can set up events to repeat at an indicated interval for a defined amount of time.

For example, your department has a weekly meeting for their staff. Schedule this meeting to repeat on a weekly basis in the system so that your staff knows exactly when the meeting is and can plan for it.

Use the Repeating Schedule screen to set up an event to occur more than once. The system places the repeating event on the calendar for the defined times.

You can set up a user ID template to copy common events to users' schedules. See Entering User Scheduler Parameters.

To schedule a repeating event:

1. From the **System** > **Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.
2. Schedule an event or display a previously scheduled event.
3. Use the **Detail** hot key to display the Schedule Detail Maintenance screen for that event.
4. Use the **Repeating** hot key to display the Repeat Scheduling screen.
5. Place an asterisk (*****) in the field that indicates how you want the system to repeat the event:

Repeating Option	Event Repeats:
( ) None	Does not repeat. This is the default.
( ) Daily	Each day. The system displays **Every day** in the **Description** field.
( ) Weekly	Each week, based on the day for which the event is scheduled. The system displays the corresponding description. For example, if the date falls on a Wednesday, the system displays **Every week on Wednesday** in the **Description** field.
( ) Monthly by Day of the Week	Each month, based on the date for which the event is scheduled. The system displays the corresponding description. For example, if the date is the last Thursday of the month, the system displays **The last Thursday of every month** in the **Description** field.
( ) Monthly by Date	Each month, based on the date for which the event is scheduled. The system displays the corresponding description. For example, if the date is the 28th, the system displays **The 28th of every month** in the **Description** field.
( ) Yearly	Each yearly, based on the date for which the event is scheduled. The system displays the corresponding description. For example, if the date is the 28th of February, the system enters **February 28th every year** in the **Description** field.

6. In the **Repeat Every** field, change the frequency of the repeat, if needed. The default is **1**.

   For example, select **Weekly** and **Wednesday** and then enter **2** in the **Repeat Every** field to repeat the event every other week on Wednesday. The **Repeat Every** field displays **2 Weeks** for an event scheduled every 2 weeks and **Every other week on Wednesday** in the **Description** field.

7. In the **End On** field, enter an expiration date if you want the event to stop repeating as of that date. If left blank, the event repeats indefinitely.
8. Press **Esc** to save the repeating schedule.
9. Press **Esc** to save your updates and exit the Schedule Detail Maintenance screen.

See Also:

Scheduling Events

Entering Detailed Information for an Event

Scheduler Overview

Scheduling Meetings

Use the Meeting Advisor to set up a meeting for multiple users. Using the parameters that you enter, the system searches for times when all the users you want to include in the meeting are available. After you schedule the meeting, users on the attendee list are notified. For example, HEATHER schedules a meeting for today at 4:30pm. The attendees receive the following message: HEATHER added you to meeting scheduled today at 04:30pm MT.

You can decide whether to search only for times when users have indicated they are available in Schedule Detail Maintenance. Or you can have the system search only for times that a user has a previous event scheduled. If you search only for a user's busy times, however, the system will not list times that a user has marked as available.

For example, Dawn has office hours from 9:00am to 5:00pm. She has marked these hours as available to indicate to the system that she can be scheduled for events and meetings during these hours. Dawn also has a daily meeting from 2:00pm to 2:30pm that she has marked as busy to indicate to the system that she cannot be scheduled for other events at this time.

If you want to schedule a meeting with Dawn today sometime between 8:00am and 5:00pm, indicate to the Meeting Advisor to search for Dawn's available times. It will show you that Dawn can attend the meeting at any time between 9:00am and 2:00pm and 2:30pm and 5:00pm. If you indicate to the system to search for Dawn's busy times only, it will show that she is busy from 2:00 to 2:30, but it will also show that she is available between 8:00am and 2:00pm and 2:30pm and 5:00pm. This listing would be incorrect. Dawn is not available between 8:00 and 9:00 because she is not in the office during this time.

We recommend that you search for available times, unless your users only indicate times when they are busy.

If authorized, you can also view a user's daily schedule to see when they have available time slots in order to determine a meeting time.

To schedule a meeting:

1. From the **System > Scheduler** menu, select **Meeting Advisor** to display the Meeting Advisor screen.

   Note: You can also display this screen by using the **Meeting Adv** hot key on the Schedule Detail Maintenance screen.

2. In the **Meeting Length** field, enter the expected length of the meeting in **Minutes** or **Hours**. The default is **60:00 Minutes**.
3. In the **Date** field, enter the date for which you want to schedule the meeting. To change the meeting date to the current day, use the **Today** hot key.
4. In the **Time Zone** field, enter the time zone in which you are scheduling the meeting.

   By default, the system displays the time zone assigned to your user ID in User Maintenance.

5. In the **Meeting Attendees** column, enter the IDs of the users you want to attend the meeting.

   The system displays each user's full name and phone extension next to their ID.

6. In the **Search Start Time** and **Search End Time** fields, enter the time range within which you want to schedule the meeting.
7. In the **Ignore Availability** field, enter **Y** to ignore the users' availability when searching for a time when everyone is available.
8. Use the **Search for Meeting Times** hot key to display the times when the users are available.

   The times display in the **User Available Times** field. To view a user's daily schedule, position the cursor on the ID and use the **Daily Sched** hot key.

9. Use the **Create Meeting** hot key to display the Select Valid Meeting Time screen. This hot key activates after the search for times completes.

   This screen displays blocks of time during which you can schedule the meeting, such as "8:00am to 12:00pm" or "3:30pm to 5:00pm."

10. Select a block of time.
11. At the **Select a Meeting Time Between** prompt, enter the starting time for the meeting.

    The system displays the Schedule Detail Maintenance screen.

12. Enter the event information.
13. Press **Esc** to schedule the meeting and return to the Meeting Advisor screen.
14. Press **Esc** to exit the Meeting Advisor screen.

    The system sends a message to each user, notifying them that you have scheduled the meeting.

See Also:

Entering Detailed Information for an Event

Scheduling Events

Scheduler Overview

Deleting and Rescheduling Meetings

Use the Schedule Detail Maintenance screen to reschedule or delete meetings. You can update meeting details at any time.

Rescheduling Meetings

When you reschedule meetings, the system sends users on the attendees list the following message: This meeting was rescheduled from <original day, date, and time> to <new day, date, and time>: <meeting description>.

If you reschedule a repeating event, the system prompts you to reschedule the end date to keep the repeating event length the same. For example, the original event starts on 8/21/03 and ends on 09/21/03. You change the start date to 10/01/03. The system prompts you to change the end date to 11/01/03.

To reschedule a meeting:

1. From the **System > Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.
2. Display a scheduled event.
3. Use the **Detail** hot key to display the Schedule Detail Maintenance screen for that event.
4. Change the **Date, Start Time,** or **End Time** fields as needed.
5. Press **Esc** to save the changes.

Deleting Meetings

The system notifies users when you delete meetings. For example, user DAWN deletes a meeting scheduled for this afternoon at 4:30pm. The system notifies users on the attendees list with the following message: DAWN deleted meeting with the description Survey Questions scheduled today at 04:30pm MT.

When deleting the one-time meeting, the system displays the following prompt: You are about to delete this meeting for all attendees! Type DELETE to continue.

To delete a meeting:

1. From the **System > Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.
2. Display a scheduled event.
3. Use the **Detail** hot key to display the Schedule Detail Maintenance screen for that event.
4. Use the **Delete** hot key and at the prompt, type **delete** to confirm.
5. Press **Esc** to exit the screen.

Entering Non-Scheduled Information

Use the Daily Scheduler to enter non-scheduled information you wish to share with others. For example, your company has four locations and each Friday you visit a different location. You can indicate in your daily schedule where you are and a small message box pops up containing this information when others view your schedule.

To enter non-scheduled information:

1. From the **System > Scheduler** menu, select **Scheduler** to display the Daily Schedule screen.

   The system displays the current day's schedule for your user ID. Change the date, as necessary.

2. In the **Start** and **End** field, enter dashes (--).
3. In the **Event Description** field, enter the description you want to display, such as Off-Site at Store #425.

   Timeless events are marked as available events. If you want to change your availability, use the **Detail** hot key to change the event details.

4. Press **Esc** to save your changes.

See Also:

Scheduling Events

Cross-Referencing Events

Use the Event Cross-Reference screen to refer to reference contacts, products, trackers or other entities with the scheduled event. You can only add cross-reference information if you are the owner of the event. The Event Cross-Reference screen displays in view-only mode if you are unable to edit it.

To cross-reference an event:

1. From the **System > Scheduler** menu, select **Scheduler**.
2. Place the cursor on the event you want to cross-reference.
3. Use the **Detail** hot key.
4. Use the **Xref** hot key to display the Event Cross Reference screen.

   The **Event ID** and **Event Description** fields are populated by the system.
5. In the **Type** field, press **F10** and select a type to associate to the event.
6. In the **ID** field, press **F10** and select an ID to associate to the type and event.

   The system populates the **Description** field to help identify the cross-reference information.
7. Press **Esc** to save your changes.

See Also:

Entering Detailed Information for an Event

Message System Overview

The Message System is an electronic notification system for communicating with other system users.

Use the Message System for the following:

- Sending a message – You can send a message immediately or schedule it to deliver at a later time. You can also create reminder notes to send at scheduled times.
- Receiving a message – You can receive messages from all users, as well as from the system. System messages are usually reminders of events or of tasks.
- Deleting a message – You can delete messages one at a time or all at once. You can also delete any duplicate messages in order to unclutter your message box.
- Viewing your sent and received messages – The system stores all messages that you send and receive until you or the system administrator deletes them.

  In addition, you can view a single dialog between you and another user.
- Viewing users who are logged on – From the Message System screen, access a list with all user IDs for users currently logged on to the system.

You can also use message groups to send single messages to a defined group of users at one time.

See Also:

Viewing Your Message Dialogs

Creating Message Groups

Viewing and Editing Message Groups

Sending Messages

Use the Message System to communicate to other users. You can send the same message to multiple users by using a message group.

You can also send messages to contacts who use the Internet Storefront function in the Web Order Entry companion product.

To send a message:

1. From the **System** menu, select **Message System** to display the Message screen.

   Note: You can also display the message system from any screen by pressing **Ctrl-F8**.

2. In the **To** field, do one of the following:

   - Enter the ID of the user or message group to whom you want to send the message. The user's full information populates in the **User Name** field, such as Dawn Miller x1183.
   - Press **F10** to select from a list of user IDs and message group IDs.
   - Use the **List** hot key to send the same message to multiple users. The system populates the **Name** field with the name of the user, message group, or displays *** List ***.

   Note: A highlighted fields display the user's current status, such as Logged On - Clocked In and their availability, such as ABC Meeting 9:00-9:30. The logged on message displays over the user's ID and the availability message displays over the **Last Sent To** field.

3. In the **Message** field, enter the information you want to send.
4. Use the **Opts** hot key to schedule the message for later delivery or send the message as a reminder.
5. Press **Esc** to send the message.

   The system sends the message, clears the **Message** field, and positions the cursor on the **User ID** field where you can enter a new ID and send another message.

6. Use the hot keys on this screen to access the following additional functions:

Hot Key	Function
Recvd	View all of your received messages.
Sent	View all of your sent messages.
Opts	Use to either: • Schedule your message to be sent at a later time. • Send your message as a reminder.
Logon	View all the users logged on to the system.

Hot Key	Function
Clr	Deletes all received and sent messages from your message system. The system prompts you to confirm the deletion. Press **F12** to abort.
Sched	Displays the Daily Schedule screen, which lists the user ID or group ID and daily entries belonging to the user or group identified on the Message screen.

See Also:

Message System Overview

Scheduling Messages to Send Later

You can schedule messages to be sent at a later time. For example, schedule a message to be sent at 4:30 p.m. as a reminder to yourself to run a report before the close of business.

To schedule a message to be sent later:

1. From the **System** menu, select **Message System** to display the Message screen.
2. In the **User ID** field, do one of the following:
   - Enter the ID of the user or message group to whom you want to send the message.
   - Press **F10** to select from a list of user IDs and message group IDs.
   - Use the **List** hot key to create a distribution list.
3. In the **Message** field, enter the information you want to send.
4. Use the **Opts** hot key to display the Options screen.

   The **Active Time Zone**, **Send Date**, and **Send Time** fields are populated with the current date and time for your time zone.
5. Change the above fields to the time at which you want the system to send the message.

   Note: When you change the time zone, the system converts the currently displayed **Send Time** to that time zone, but does not change your system settings.
6. In the **Transfer Msg to Reminders (Y/N)** and **Also Send Message Now (Y/N)** fields, leave the entries as **N**. These fields apply to reminder notes.
7. Press **Esc** to schedule the message and return to the Message screen.

See Also:

Message System Overview

Sending Messages

Sending Reminder Messages

Sending Reminder Messages

You can set up reminder messages to display for users when they log on or off the system. The system can send the first time a user logs on or off each day or every time the user logs on or off. You can also attach an expiration date to the reminder message.

For example, if you have scheduled an early morning meeting with another user on Friday, you can send a reminder message that displays when the user logs off on Thursday.

To send a reminder message:

1. From the **System** menu, select **Message System** to display the Message screen.
2. In the **User ID** field, do one of the following:
   - Enter the ID of the user or message group to whom you want to send the message.
   - Press **F10** to select from a list of user IDs and message group IDs.
   - Use the **List** hot key to create a distribution list.
3. In the **Message** field, enter the reminder you want to send.
4. Use the **Opts** hot key to display the Options screen.

   The **Active Time Zone**, **Send Date**, and **Send Time** fields are populated with the current date and time for your time zone and have no bearing on sending the message as a reminder.
5. In the **Transfer Msg to Reminders (Y/N)** field, enter **Y** to turn the message into a reminder note.
6. In the **Also Send Message Now (Y/N)** field, enter **Y** if, in addition to setting the message up as a reminder, you also want to send the message now.
7. Press **Esc** to display the Reminder Notes Maintenance screen.

   Use this screen to schedule your message to be sent when the designated user logs on or off the system.

See Also:

Message System Overview

Sending Messages

Scheduling Messages to Send Later

Changing Message Notifications

Each time you receive a new message the system can notify you on the notification bar at the bottom of the Eterm window. By default, the message scrolls across the notification bar. You can specify how or if you want this notification to display.

Use the User Maintenance screen to change how you want to receive notification.

To change a message notification:

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 your user name.
3. Use the **Addl** hot key to display the Additional Data selections.
4. Use the **Addl Data** hot key to display the Additional User Settings screen.
5. In the **New Message Notification** field, press **F10** and select one of the following:
   - **Scrolling Notification –** New message text scrolls across the bottom of the Eterm window. This is the default.
   - **Single Notification –** Displays a message indicating how many new messages you have waiting. For example, 2 New Messages Waiting.
   - **No Notification –** Deactivates message notification. Messages still display in the message queue, but no notification is sent.
6. Press **Esc** to save your changes and exit the screen.
7. Press **Esc** to save your changes and exit User Maintenance.

See Also:

Sending Messages

Managing Messages

Use the Sent and Received Messages screens to view and manage your messages. The system stores your sent and received messages until you delete them.

The screens that display sent and received messages use the same layout and hot keys.

From these screens, you can:

- View your sent or received messages.
- Delete duplicate messages.
- Redirect or resend a message.
- Create a new tracker and copy the message into it.
- View a tracker referenced in a message.
- Print the displayed messages.
- Send the displayed messages to your Hold file.
- View a dialog of all the messages exchanged between you and another user.

To view a message:

1. From the **System** menu, select **Message System** to display the Message screen.
2. Use the **Recvd** or **Sent** hot key to view the messages.

   A screen displays the messages you selected, showing the following information:

Field	Received Messages Description	Sent Messages Description
Date	Date when the message was received.	Date when the message was sent.
Time	Time when the message was received.	Time when the message was sent.
User ID	ID of the user who appended to the tracker or sent the message.	ID of the user to whom you sent the message.
Message	Text of the message or a notification with the ID number of the tracker to which a comment was appended.	Text of the message or a notification with the ID number of the tracker to which a comment was appended.

3. Use the **Arrow Keys** to scroll up and down through your messages.
4. Use the hot keys to perform the following functions:

Hot Key	Function
Delete	Deletes the message on which your cursor is placed.
Delete All	Deletes all the messages listed on the screen. The system prompts you to confirm the deletion.

Hot Key	Function
Redirect	Sends the message to another user. At the prompt, enter the user ID for whom to send the message. (If you press **Esc**, the message is not sent.) The system sends the message with the preface **Redirected from: User ID** and adds the message to your Sent Message list.
Job Queue	Creates a new tracker containing the message. At the prompt, enter the ID of the user you want to add to the tracker. The system displays the Call Tracking Entry screen for the entered user ID with the message displayed in the tracker **Comment** field.
View	When the cursor is placed on a tracker message, displays the Call Tracking Entry screen for that tracker.
Resend	Resends the message to the same or another user. Enter the user ID(s) on the displayed Message screen to resend the message.
Delete Dups	Deletes duplicate messages (messages with the same information in the **Message** field). The system prompts you to confirm the deletion.
Print	Prints all selected messages. • To select a message, place the cursor next to the message and press the **Space Bar**. An asterisk (*) to the left of the **Date** field indicates that the item is selected. Press the **Space Bar** again to de-select the message. • To select a group of messages, use the **Select** hot key. • If you do not select a message and use the **Print** hot key, the prompt **Would You Like to Print ALL Your Messages** displays. Enter **Y** to print all displayed messages.
Hold	Sends the displayed messages to your Hold file.
Select	Displays only messages which meet selection criteria based upon: • **Text Search String –** Displays messages containing the text you enter. • **User ID –** Displays messages sent to or received from that user only. • **Msg Start Date –** Displays all messages sent or received on or after the indicated date. • **Msg End Date –** Displays all messages sent or received on or before the indicated date. Use this function to select messages to print or send to your Hold file.
Clear Select	Clears your selected messages and displays all messages on the Receive or Send screen.
Dialog	Displays the Message Dialog screen.

5. Press **Esc** to return to the Message screen.

See Also:

Message System Overview

Viewing Messages

Viewing Messages

Use the Message Dialog screen to review the dialog that has occurred between you and another user in the message system. Once you select a user, the screen displays a list of all the messages you have sent to and received from that user.

On this screen, you can do the following:

- Sort the messages in ascending or descending order.
- List messages that meet selection criteria.
- Print messages.
- Redirect messages to other users.

To view a message:

1. From the **System** menu, select **Message System** to display the Message screen.
2. Use either the **Recvd** or **Sent** hot keys to display the Received or Sent Messages screen.
3. Position the cursor on the user ID for whom you want you view the dialog and use the **Dialog** hot key to display the Message Dialog screen.

   The screen lists all the messages you have sent to and received from the designated user and populates the following fields:

Field	Description
Date	Date the message was sent or received.
Time	Time the message was sent or received.
User ID	User ID with whom you had the displayed dialog.
R/S	Whether you sent (**S**) or received (**R**) the message.
Message	The text of the message.

4. Use the following hot keys, as necessary:

Hot Key	Function
Sort	Sorts the messages in ascending (oldest to newest) or descending (newest to oldest) order.
Select	Displays messages that meet selection criteria based upon: • **Text Search String** – Displays messages containing the text you enter. • **Msg Start Date** – Displays all messages sent or received on or after the indicated date. • **Msg End Date** – Displays all messages sent or received on or before the indicated date.
Clear Select	Clears your selected messages and displays all messages in the dialog.

Hot Key	Function
Print	Prints all selected messages. • To select a message, place the cursor next to the message and press the **Space Bar**. An asterisk (*****) to the left of the **Date** field indicates that the item is selected. Press the **Space Bar** again to de-select the message. • To select a group of messages, use the **Select** hot key. • If you do not select a message and use the **Print** hot key, the prompt **Would You Like to Print ALL Your Messages** displays. Enter **Y** to print all displayed messages.
Redirect	Redirects the message on which the cursor is positioned to another user. At the prompt, enter the user ID to whom you want to send the message.
Change User	Displays a message dialog for a different user ID. At the prompt, enter the user ID for whom you want to view the Message Dialog screen.
Send Msg	Displays the Message screen, where you can send a new message to the user displayed in the Message Dialog screen.

5. Press **Esc** to exit the Message Dialog screen.

See Also:

Viewing Messages

Message System Overview

Viewing Logged On Users

From the Message System, you can view a list of users who are currently logged on to the system.

To view a logged on user:

1. From the **System** menu, select **Message System** to display the Message screen.
2. Use the **Logon** hot key to display the Users Currently Logged On screen.

   This screen displays those users who are currently logged on, as well as the following information:

Field	Description
Port #	The port on which the user is logged on.
User ID	The ID of the user logged on.
Name of User	The name and phone extension of the user logged on.
Location	The location of the user.
Logon Date and Time	The most recent date and time the user has logged on.

3. To view users who are logged on through a designated medium, use the **Select Type** hot key. Press **F10** at the **Enter TTY Type** prompt and select one of the following mediums:
   - **M – Modems**
   - R – RF Units
   - W – Web Users
   - S – Solar Users
   - A – All
4. When finished, press **Esc** to exit the screen.

See Also:

Message System Overview

Limiting Sent and Received Messages

You can specify how many messages you want to keep in your sent and received lists. This setting overrides the system limitation. If you reach the specified number of messages, the system deletes the oldest messages as new ones come in.

Use the User Maintenance screen to change how many messages to keep.

To limit a sent or received message:

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 your user name.
3. Use the **Addl** hot key to display the Additional Data selections.
4. Use the **Addl Data** hot key to display the Additional User Settings screen.
5. In the **Maximum Number of Messages** field, indicate how many messages you want to keep in your sent and received lists.
6. Press **Esc** to save your changes and exit the screen.
7. Press **Esc** to save your changes and exit User Maintenance.

See Also:

Sending Messages

Changing Message Notifications

Creating Message Groups

Use the Message Group Maintenance screen to create groups of users for the purpose of sending the same message to all members at the same time. A user can belong to more than one message group.

Assign message groups to one of the types defined in the Valid Message Group Types control maintenance record.

When using the PERSONAL message group type, the message group can be viewed and edited only by the user who created it. Other types can be viewed and edited only by those users to whom that message group type has been assigned.

To create a message group:

1. From the **System > System Files > User Control** menu, select **Message Group Maintenance** to display the Message Group Maintenance screen.
2. In the **Message Group ID** field, type **new** and press **Enter**.
3. At the prompt, enter the new ID up to 10 characters, with no spaces.
4. A message group ID cannot be the same as a user ID.
5. In the **Message Group Type** field, press **F10** and select a restriction type to define who can view and edit this message group. If left blank, any user can view and edit this message group.
6. If you are assigned the MESSAGE.GROUP.TYPES authorization key and PERSONAL is one of your assigned message group types, the value in this field defaults to **PERSONAL**. You can change this message group type to any group for which you are authorized.
7. If you are not assigned the MESSAGE.GROUP.TYPES authorization key, you can assign any type of message group.
8. In the **Description** field, enter a complete description using up to 25 characters of the message group.
9. In the **Security Level** field, enter a security level to determine who is authorized to send messages to this message group. You can assign a level from 1-99. Leave this field blank to allow any user to send a message to this group. Users can only send messages to groups with a security level less than or equal to the level assigned to their MESSAGE.GROUP authorization key.
10. In the **User IDs** field, enter the user IDs to assign to the group.
11. **Note:** To delete an ID from the list, select the ID and press **Alt-Delete**.
12. Use the **Sort** hot key to sort the list in alphabetical order by user ID.
13. Press **Esc** to save the group.

Viewing and Editing Message Groups

After you have created message groups, use the Message Group Maintenance screen to view or edit these groups.

To view or edit a message group:

1. From the **System > System Files > User Control** menu, select **Message Group Maintenance** to display the Message Group Maintenance screen.
2. In the **Message Group ID** field, enter the ID of the group you want to access.

   Press **F10** in this field to list your personal message groups. Press **F10** again to display all other message group of which you are authorized.
3. In the **Message Group Type** field, enter any group type for which you are authorized to view or edit. This field is optional.
4. Verify or edit the **Description**, **Security Level**, and **User IDs** fields, as needed. See Creating Message Groups for descriptions of these fields.
5. Use the **Sort** hot key to sort the list in alphabetical order by user ID.
6. Press **Esc** to save the updated group.

See Also:

Creating Message Groups

Message System Overview

Index