ACTIVANT®

Eclipse Trackers, Logs, and Queues

Release 8.6.4 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.3 Online Help System

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Trackers, Logs, and Queues Overview

The Eclipse system uses trackers, activity logs, and queues to keep users up-to-date about tasks that need to be accomplished.

Trackers

Use the Call Tracking System to track and report on customer, vendor, and user issues. Trackers provide a running account of a problem and the activities taken to resolve it. Use trackers to keep a running list of your tasks in the User Job Queue.

Use the Call Tracking System to:

- Append messages and vital information to a single record stored on your system and accessible only by selected users.
- Submit work and enhancement requests for the system to Eclipse Support and monitor the progress of these trackers through the Eclipse Support Website.
- Assign and remove personnel from a tracker.
- Prioritize work requests, assign follow-up dates, and record hours spent on a tracker.
- Integrate trackers with the User Job Queue, allowing users to display trackers assigned to them, and to filter and sort trackers according to priority.

Activity Logs

Activity logs are archives for trackers. Every customer, vendor, user, product, and order has an associated activity log.

Use an activity log to assign tasks to other users, to monitor the progress of those tasks, and to facilitate communication.

Two additional activity logs monitor the Electronic Data Interface (EDI), if it is installed, and the system as a whole. The system populates the logs, which system administrators and Eclipse support personnel use for diagnosing system problems.

Queues

Queues are electronic to-do lists. Queues hold system-generated or user-generated reminders of tasks that you need to manage. Users are responsible for monitoring their job queues and different function queues.

For example, one function queue is the Call When Complete Queue. If an open order (one that is waiting for a back ordered item) has a status of Call When Complete and the back ordered item is received, the system adds an entry to the Call When Complete function queue.

See Also:

Call Tracking Maintenance Overview

Setup Requirements for Call Tracking

Following are the control maintenance records and additional setup for call tracking.

Control Maintenance Records

Set the following control maintenance records:

- User Defined Call Tracking Notes
- Bypass Header Information For Call Tracking Entry
- Default Status For New Entry In Call Tracking Followup List
- Enable Auto Hours Tracking In Call Tracking System
- Valid Tracker Report Types
- Valid Tracker Severity
- Valid Tracker Types
- Valid User Job Queue Statuses

Additional Setup

In User Maintenance, set up all user defaults for call tracking.

See Also:

Call Tracking Overview

Setup Requirements for Activity Logs

Following are the control maintenance records and authorization keys for activity logs.

Control Maintenance Records

Set the following control maintenance records:

- Cust/Vend/User Activity Log Viewing Default Transcription Type
- Valid Activity Sources

Authorization Keys

Assign the following authorization keys:

- CUST.ACTIVITY.CMT.EDIT
- CUST.ACTIVITY.EDIT
- CUST.ACTIVITY.VIEW
- PRD.ACTIVITY.CMT.EDIT
- PRD.ACTIVITY.EDIT
- PRD.ACTIVITY.VIEW
- USER.ACTIVITY.CMT.EDIT
- USER.ACTIVITY.EDIT
- USER.ACTIVITY.VIEW
- VEND.ACTIVITY.CMT.EDIT
- VEND.ACTIVITY.EDIT
- VEND.ACTIVITY.VIEW

See Also:

Activity Logs Overview

Trackers, Logs, and Queues Overview

Setup Requirements for User Job Queues

Following are the control maintenance records and authorization key for setting up the User Job Queue.

Control Maintenance Records

Set the following control maintenance records:

- Bypass Header Information For Call Tracking Entry
- Cust/Vend/User Activity Log Viewing Default Transcription Type
- Default Status For New Entry In Call Tracking Followup List
- Enable Auto Hours Tracking In Call Tracking System
- Job Tracking Default Early Release Status
- Next Action By For Dollars Invoiced Quote
- Number Of Days Before Job Quote Expires
- Number Of Records To Save In User Quick Access Lists
- Status For New Trackers Or New Appends
- Use User's Sec Level As Default For Queue Entries
- Valid Activity Sources
- Valid Tracker Report Types
- Valid Tracker Severity
- Valid Tracker Types
- Valid User Job Queue Statuses

Authorization Key

Assign the following authorization key:

- USER.JOB.QUEUE

See Also:

User Job Queue Overview

Trackers, Logs, and Queues Overview

Call Tracking Overview

Trackers are work requests that help you identify issues that need to be resolved, contain a running log of how work is being done, and indicate to whom the work is assigned. You can also attach pertinent documents and images to trackers.

When you create trackers, you can access the Call Tracking Entry screen from various menus to identify for whom you are creating the tracker. When you create a tracker for a customer, vendor, or user, the system permanently stores the tracker is the designated entity's activity log.

You can share trackers with other users by adding the user IDs to the tracker's forward list. When your user ID is on a tracker's forward list, the system places a copy of the tracker in your user job queue.

You can copy a tracker to create a new one with similar information. You can add comments and notes to assist users assigned to the tracker or as a record of your work. You can also attach documents or transfer information to a tracker.

In addition, you can create trackers from the following:

- Transactions – From a transaction's screen, copy the data into a tracker to better monitor its progress.
- Existing trackers – Spawn a tracker from another to address a separate facet of the same issue. Copy a tracker from another to assign it to a new user or entity.

See Also:

Setup Requirements for Call Tracking

Creating Trackers

Trackers, Logs, and Queues Overview

Creating Trackers

Use the Call Tracking Entry screen to create new trackers. Depending on how you access the Call Tracking screen, you can create a tracker for a user, a customer, or a vendor.

When you create trackers, you can define the business area the tracker affects, such as accounting, a security level that determines who can access the tracker, and the expected date by which the tracker should be resolved.

After you create a tracker, append your comments, forward it to other users who need to work on it, and monitor its progress. Manage the tracker, as needed, until it is resolved.

The tracker heading contains the following information used for tracking the work request:

- Entity to whom the tracker is assigned and contact person.
- Category, work area, and sub area assigned to the work request.
- Source of the work request, such as e-mail, telephone, or in-person.
- Priority for the work request.
- Personnel responsible for next action and final action.
- Expected completion and delivery dates.
- Security levels and statuses to determine who can view the tracker.

To create a tracker:

1. Display the Call Tracking Entry screen in one of the following ways:
    - From the **System** menu, select **User Activity Log Entry** to store the tracker in the designated user's activity log.
    - From the **A/R** menu, select **Customer Activity Log Entry** to store the tracker in the designated customer's activity log.
    - From the **A/P** menu, select **Vendor Activity Log Entry** to store the tracker in the designated vendor's activity log.

    Note: You can also create a tracker from a displayed transaction, copy a tracker, and spawn a tracker.

2. In the **ID** field, enter the user or entity name to whom you are assigning the tracker.

    The system displays the Call Tracking Select screen with the word "New" displayed in the **Type** field.

3. Press **Enter** to start the new tracker.

   The system assigns a tracker ID, displays the Call Tracking Entry screen, and populates the following fields:

Field	Description
Cust ID	The internal ID for the entity or user to which the tracker is assigned.
TZ	The time zone of the entity's or user's location.
Entered	The date and time the tracker was created, along with the user ID of the person who created the tracker.
Customer	The entity or user name associated with the tracker.

4. Complete the header information fields, as needed.
5. In the **All Comments** field, enter the initial tracker comment.

   In the first line of the comment, use keywords that define the tracker. When the system lists trackers in synopsis mode, the keywords help users identify the tracker contents.
6. Use the **Forward** hot key to forward the tracker to other users.
7. Use the remaining hot keys, as needed.
8. Press **Esc** to save your changes and exit the tracker.

See Also:

Call Tracking Overview

Copying or Moving Trackers

Copying a tracker creates a new tracker, which contains the same information as the original tracker. Use this function to create similar trackers for multiple entities.

Moving a tracker changes the activity log to which a tracker is assigned. The system removes the tracker from one activity log and moves it to another. Use this function if you mistakenly assigned a tracker to the wrong entity.

To copy or move a tracker:

1. Open the tracker you want to copy or move.
2. Use the **Copy** hot key to display the Tracking Log Copy screen.
3. In the **User** or **Entity** field, enter the ID to which you want to assign the new or moved tracker.
4. In the **Comments to Copy** field, press **F10** and select one of the following:
   - **All –** Copies all comments. Select this option if you are moving a tracker to a new activity log.
   - Internal – Copies internal comments only.
   - External – Copies external comments only.
   - Secure – Copies secure comments only.

   For additional information about appended comments, see Appending Comments to Trackers.
5. In the **Copy Notes (Y/N)** and **Copy Hours (Y/N)** fields, indicate whether you want to include all notes and hours associated with the original tracker in the new or moved tracker.
6. Use the following hot keys, as needed:

Hot Key	Function
Copy	Copies the tracker to the user or entity activity log. The initial comment remains unchanged. A new tracker ID and date/time stamp are assigned, and the system indicates that action by inserting ***** Copied from** and the original **Tracker ID** and **Date** prior to the initial comment.
Move	Moves the tracker to the user or entity activity log. The initial comment remains unchanged. A new tracker ID and date/time stamp are assigned, and the system indicates that action by inserting ***** Moved from** and the original **Tracker ID** and **Date** prior to the initial comment.

   The system displays the new tracker on the Call Tracking Entry screen.
7. Edit the tracker, as needed, and then press **Esc** to save the tracker.

Creating Trackers From Ledger Transactions

You can create a tracker from any ledger transaction, such as a sales order or cash receipt. The system includes the transaction ID and other information in the initial tracker comment. From the tracker, you can use the **View** hot key to view the transaction.

Important: The following procedure is different from Release 7. If you have upgraded from Release 7 recently, please read the procedure carefully. Specifically, how to create a tracker with a different user ID.

To copy line item information from a sales, purchase, or transfer order into a tracker, add the designated line items to the OE clipboard and then select the **Line Item Clipboard Info** option when performing the following procedure.

When you create a tracker from a sales order transaction and the order is invoiced, the system appends to the tracker with the invoice information.

To create a tracker from a ledger transaction:

1. From a ledger transaction, press **Shift-F4**.

   At the **Enter Tracker For** prompt, the system displays the activity logs to which you can assign the tracker.

   The options, which vary depending on the type of transaction from which you press **Shift-F4**, can include the following:

Option	Description
Ship-To	Displays the Ship-To the system is using for that transaction and assigns the tracker to the bill-to customer's activity log.
Bill-To	Displays the Bill-To the system is using for that transaction and assigns the tracker to the bill-to customer's activity log.
Ship-From	Displays the Ship-From the system is using for that transaction and assigns the tracker to the bill-to customer's activity log.
Pay-To	Displays the Pay-To the system is using for that transaction and assigns the tracker to the bill-to customer's activity log.
User	Displays the user ID of the person currently logged in and assigns the tracker to that activity log.
Different User	Opens an empty track so that you can assign the tracker to another designated user's activity log. **Note:** They system defaults to using the current user's ID. To change this select this option. You will also need to change the Next Action on the tracker when the tracker has been created.
Order	Indicates the order's activity log.

Option	Description
Line Item Clipboard Info	You can use the ship-to customer's activity log and copy the order generation's line item data from the OE clipboard into the tracker. **Note:** The system only displays this option if you are viewing a sales, purchase, or transfer order generation and have copied one or more line items from the order generation to the OE clipboard.

2. Select the activity log to which to assign the tracker.

   The system displays the Call Tracking Entry screen with the transaction information in the comment section of the tracker.

3. Edit the header information fields, as needed.
4. Append your comment to the tracker.

   Note: When you use the **Different User** option, you must change the **Next Action** field when you append to the new user.

5. Use the **Forward** hot key to update the forward list and select other users that need to see or review the tracker, as needed.
6. Use the remaining hot keys, as needed.
7. Press **Esc** to save the tracker, send it to the users on the forward list, and return to the ledger transaction.

   Note: To access the tracker from the ledger transaction, view the transaction's change log.

See Also:

Call Tracking Overview

Creating Trackers

Spawning Trackers

Spawn a new tracker from an original tracker when a new issue, which is related but secondary to the original issue, is found. The original tracker is linked to the spawned tracker, but you resolve each individually. Spawning a new tracker prevents the original tracker from being cluttered with secondary issues, so you can focus on the original issue.

On the original tracker, the **Spawn** hot key displays is highlighted to indicate that trackers have been spawned. Use this hot key to view spawned trackers.

On the spawned tracker, the **View** hot key is highlighted to indicate that the tracker was spawned. Use this hot key to view the original tracker.

To spawn a new tracker:

1. Display the tracker from which you want to spawn a new tracker.
2. Use the **Spawn** hot key to display the Spawned Trackers screen, select **New**, and press **Enter**.

   The Call Tracking Spawn screen displays, prompting you for the type of information to copy to the spawned tracker.
3. For each of the following fields, accept the defaults by pressing **Enter** or change the values and press **Enter**.

Field	Description
Entity	The customer or vendor to whom to assign the spawned tracker. By default, the system assigns the tracker to the same entity as the original tracker. Use the **Multi** hot key to assign the tracker to multiple entities.
Clear Comments for Spawn	Indication whether to clear or copy the comments from the original tracker in the new tracker. • **Y** – Clears all original tracker comments from the spawned tracker. This is the default. • **N** – Copies all comments from the original tracker to the new tracker.
Clear Followup List for Spawn	Indication whether to clear or copy the forward list from the original tracker to the new tracker. • **Y** – Clears the original forward list from the spawned tracker. This is the default. **Note:** If one or more contacts are following the progress of the tracker using online customer call tracking, a prompt displays asking if you want to clear the external forwarding list for the tracker. At the prompt type **N** to copy the contacts on the external forwarding list to the spawned tracker. Type **Y** to clear the contacts on the external forwarding list of the new tracker. • **N** – Copies the forward list from the original tracker to the new tracker.

The Call Tracking Entry screen displays for the spawned tracker with the header information copied from the original tracker.

4. Edit the header information on the tracker, as needed.
5. In the **All Comments** field, enter the new tracker issue.
6. Use the **Forward** hot key to update the forwarding list, as needed.
7. Use the remaining hot keys, as needed.
8. Press **Esc** to save the tracker and send it to the users on the forward list.

   The original tracker from which you spawned the new tracker displays.

See Also:

Call Tracking Overview

Opening Trackers

In addition to creating trackers, you can use the Call Tracking Entry screen to open existing trackers.

If you open a tracker that another user is editing, the system displays the tracker for you in view-only mode with a message identifying the user who has the tracker locked. If you open a tracker that *you* are already editing, the system displays a reminder that you already have the tracker open for editing and gives you the option to display the tracker in view-only mode.

> **Note:** You can also open trackers from the User Job Queue Viewing and Activity Log Viewing screens.

To open a tracker from the Call Tracking Entry screen:

1. Display the Call Tracking Entry screen in one of the following ways:
   - From the **System** menu, select **User Activity Log Entry** to open a tracker in the designated user's activity log.
   - From the **A/R** menu, select **Customer Activity Log Entry** to open a tracker in the designated customer's activity log.
   - From the **A/P** menu, select **Vendor Activity Log Entry** to open a tracker in the designated vendor's activity log.
2. In the **ID** field, do one of the following:
   - Enter a tracker ID, such as BBW571.
   - Press **F10** to display a quick access list of trackers you have recently viewed and select a tracker from the list.
   - Enter a keyword preceded by a forward slash (/) to display a list of trackers containing that keyword and select a tracker from the list.
   - Enter all or part of the user ID, customer name, or vendor name to which the tracker is assigned.

     Note: If you display the screen for customer trackers, enter a customer name; if you enter a vendor name, the system will not find the vendor. This guideline also applies to vendor and user names.

     The system displays the Call Tracking Select screen.

3. Complete the following fields, press **Enter** to display a list of trackers that match your search criteria, and select a tracker from the list.

Field	Description
Type	Press **F10** and select one of the following options: • **New** – Creates a new tracker for the designated entity. • **Open Trackers** – Displays only open trackers for the entity. • **Internal Open Trackers** – Displays only trackers open internally but closed externally. • **Closed Trackers** – Displays only closed trackers for the entity. • **Show All Trackers** – Displays all trackers for the entity regardless of open or closed status.
Word String	Enter a word or phrase in the keyword list of the tracker for which you are searching. This field is optional.

The system displays the selected tracker.

See Also:

Searching the System for Trackers

Creating Trackers

Appending Comments to Trackers

Appended comments, also called appends, record the progress of trackers. Users assigned to trackers can record all work done on a tracker, such as testing or placing a call to a customer regarding an order. Appends can be internal, external, or secure. Only internal users on the forward list can view internal appends. Internal users and external users (customers assigned to the tracker) can view external appends. Only the author and the author's selected users can view secure appends.

By default, the system sends a message to every user on the forward list when you make an append to a tracker, but you can determine who receives message notification. Limiting the messages the system sends to only the users who need notification, eliminates unnecessary messages for the other users on the forward list.

In addition to making appends, you can also attach documents or images to the tracker. For example, if you have a tracker for monitoring a customer's large outstanding balance and the customer sends a letter that explains their payment plan, you can scan the letter and attach the image to the tracker.

Note: If the user is not the owner of the original append and their view level in USER.ACTIVITY.VIEW, VENDOR.ACTIVITY.VIEW, or CUST.ACTIVITY.VIEW (depending on the tracker type) is at least the security level of the tracker, the user is allowed to edit the original append. If there is no tracker security level, any user that has access to view the tracker can edit an original append.

To append a comment to a tracker:

1. Open a tracker.
2. Use the **New Append** hot key to display the Append Message screen. The cursor defaults to the **To:** field.
3. In the **To** field, indicate to whom you are directing your comment by doing one of the following:

To enter an append for...	Task
a single user	Enter a single user ID, such as ADMINTEAM or SUPPORT.

To enter an append for...	Task
a group of users	Do one of the following: 1. Press **Enter** or use the **Multi To's** hot key. The system displays the Multi To: List screen which shows all the users on the forward list. 2. Do one or both of the following: • Use **Alt-Delete** and **Alt-Insert** to edit the user IDs on this list to only those who need to read your append. • On a blank line, enter a new user you want to add. 3. Press **Esc** after selecting the users. The system displays *MULTI* in the **To** field.
everyone on the forward list	Do the following: 1. Enter **all.list** or press the **Enter** key. The system displays the Multi To: List screen. 2. Press **Esc** to select all users on the forward list. The system displays *MULTI* in the **To** field.
a note, without updating anyone	Type **note**. **Note:** If your company has more than one kind of note entry, the system prompts you to select a note type.

The system populates the following fields, which you can edit:

Field	The system populates the field with...
Status	the status of the selected user ID, as indicated on the forward list.
Next Action	the user ID designated in the **Action Req'd By** field on the forward list.
Append comment	a prefix that corresponds to the user or users to whom the append is directed. **Note:** If sending a message to all users using the all.list function, the system does not list all the user IDs in this field. If this is a note append, the system displays NOTE as the prefix.

4. Enter the comment to append.

Note: When you enter transaction or identification numbers in your comments, users reading the append can use the **View** or **Edit** hot keys to access those items.

5. Use the following hot keys, as necessary:

Hot Key	Function
Append Type	Select one of the following: • **Internal** – Only internal users can view the append. External users cannot view the append. This is the default. • **External** – Internal and external users can view the append. The system adds CLIENT to the **To** field, which notifies any external contacts on the forward list who have automatic notification enabled. The system does not notify internal users unless they are included on the Multi To: List screen. • **Secure** – Only the person entering the comment and the users entered on the Secure List screen can view the append. Use the **Secure List** hot key to enter a list of users that can view the secure append.
Keywords	Displays the Keywords screen, which lists the keywords the search routine uses to identify this tracker. You can add additional keywords to the screen.
Add Xref	Displays the Tracking Log Viewing screen, which lists trackers you have recently viewed. Position the cursor on a tracker in the list and press **Esc** to add a reference to that tracker to your append message.
Sel Cmt	Displays the User / Company (*) Defined Comments screen, where you can select a standard user or company comment to add to your append message. The screen lists user-defined comments first. Asterisks precede company-defined comments.
Edit Cmt	Displays the User Comments Maintenance screen, where you create or edit standard user and company comments, which you can add to tracker appends, tracker closing comments, or fax memo comments.

6. Press **Esc** to save your append and return to the Call Tracking Entry screen.
7. Press **Esc** to save your changes and exit the tracker.

See Also:

Finding and Editing Comments on Trackers

Adding Internal Notes to Trackers

Creating User and Company-Defined Comments

Editing Header Information on Trackers

The fields in a tracker header identify the customer, vendor, or user to whom to tracker is assigned and other key information about the tracker, such as accounting, the security level to protect who can access the tracker, and the expected date by which the tracker should be resolved. Edit these fields as needed.

To edit header information on a tracker:

1. Open a tracker.
2. Edit the following fields, as needed:

Field	Description
Customer	The customer, vendor, or user to whom the tracker is assigned.
Category	Category to which to assign the tracker for reporting purposes. Press **F10** and select a category.
Work Area	Work area within the category assigned for reporting purposes. After assigning a category, press **F10** and select a work area.
Sub Area	Sub area within the work area assigned for reporting purposes. After assigning a work area, press **F10** and select a sub area.
Source	Source from which this tracker originated, such as Phone, E-mail, or In Person. Press **F10** and select a source.
Contact	For customer or vendor trackers, the primary contact responsible for monitoring this tracker. Press **F10** to display the list of contacts assigned to the customer or vendor and select one.
Priority	Priority assigned to the tracker. Press **F10** and select from the list of system-defined priorities.
Ext Status	Tracker status for external users, such as customer contacts, who view this tracker. Press **F10** and select a status from the list.
Int Status	Tracker status for internal users, such as your employees, who view this tracker. Press **F10** and select a status from the list.
Sec Level	Security level (1-99) associated with the tracker. If your security level in the CUST.ACTIVITY.EDIT or VENDOR ACTIVITY.EDIT authorization key, depending on the type of tracker you are creating, is less than the security level, you cannot change the security level of the tracker.
Next Action	User ID of the person responsible for taking the next action on the tracker.
Final Action	User ID of the person responsible for taking final action and closing the tracker.
Expected Dt	Date when you expect the tracker to be resolved.
Delivery Dt	Date when you must deliver the tracker results to the customer, vendor, or user to whom it is assigned.

3. Append a comment to the tracker or use the hot keys, as needed.
4. Press **Esc** to save your changes and exit the tracker.

Finding and Editing Comments on Trackers

Use the Job Tracking Search screen to locate a word or phrase in the comments appended to a tracker.

For example, to locate a comment that you previously appended to a tracker, use your user ID as the search string. To find a comment about completing a work order, enter **work order** as the search string.

You can edit any comment that you appended to the tracker. You cannot edit comments entered by other users.

To find a comment on a tracker:

1. Open a tracker.
2. Use the **Find Str** hot key to display the Job Tracking Search screen.
3. In the **Search String** field, enter the text you want to locate.
4. In the **Start From Top** field, enter one of the following:
   - **Y –** Starts the search from the first line of the tracker.
   - **N –** Starts the search from the current cursor position.
5. In the **Display Number of Occurrences** field, enter one of the following:
   - **Y –** The system indicates how many times the search string occurs in the tracker.
   - **N –** The system does not display the number of occurrences.
6. Press **Enter** to perform the search.

   If you indicated that you want to see how many times the string occurs in the tracker, the system displays a message indicating the number of occurrences found. Press **Enter** to acknowledge the message and continue.

   - If there is an occurrence of the text string, the cursor moves to the line where the text is located.
   - If there is *no* occurrence of the text string, the system returns to the Call Tracking Entry screen.
7. To search for the next occurrence that meets your search criteria, repeat steps 2-6.

   If no additional occurrences exist, the system displays a prompt alerting you that the item was not found and asking if you want to search again starting from the top of the tracker. Press **Enter** to continue the search from the top, or type **N** and press **Enter** to end the search.

To edit a comment on a tracker:

1. Open a tracker.
2. Find the comment you want to edit.

3. Use the **Edit Append** hot key to display the selected comment on the Append Message screen.
4. Edit the text of the comment, as needed.
5. Press **Esc** twice to save your changes and exit the tracker.

Adding Internal Notes to Trackers

Use the Notes screen to add internal comments to a tracker. Internal notes do not display in the body of the tracker with the appends, and therefore do not print or send a notification to any users when added. Use the **Notes** hot key to add or view notes.

The note types you can create are defined in the User Defined Call Tracking Notes control maintenance record.

To add an internal note to a tracker:

1. Open the tracker to which you want to add a note.
2. Use the **Notes** hot key to display the Notes screen, which lists the types of notes you can enter.
3. Select a note type and press **Enter**.

   The screen for the type you selected, such as **Customer Notes**, displays.
4. Enter the note to attach to the tracker.
5. Press **Esc** to return to the tracker.
6. Press **Esc** to save all changes and exit the tracker.

See Also:

Appending Comments to Trackers

Creating Standard User and Company Comments

Attaching Documents and Images to Trackers

In addition to appending comments to a tracker, you can also attach documents and images that can clarify or enhance the tracker discussion. To do this, your company must have the Document Imaging companion product.

To attach a document or image to a tracker:

1. Open the tracker to which you want to attach a document or image.
2. Do one of the following:
   - Press **Shift-F7**.
   - From the Eterm menu bar, select **Attachments**.
3. Browse to the file you want to attach and select it.

   The Attachment Indexing screen displays.
4. In the **Description** field, replace the default profile description with a more complete description of the attached image, if needed.
5. In the **Doc Profile** field, replace the default document profile, if needed, by selecting from a list of available document profiles, such as Signature or Letter.
6. Use one of the following hot keys:
   - **Index –** Cuts the file from the current location and pastes it in the index. For example, if you attach a file from your hard drive, the system *removes* the file from that location and places it into the indexed file.
   - **Index W/O Delete –** Copies the file from the current location and pastes it in the index. The file is then in two places. For more information about attachment indexing, see Using the Attachment Indexing Screen.

   Note: Use the ***i*** hot key in the upper-right corner of the Call Tracking Entry screen to display the attachment.
7. Press **Esc** to exit the Call Tracking screen.

See Also:

Appending Comments to Trackers

Adding Internal Notes to Trackers

Document Imaging Overview

Adding Revisions to Trackers

Use the Call Tracking Revision screen to log individual issues related to a tracker.

Each issue is recorded on a separate line and therefore not lost within a tracker. Each line contains a problem statement, the date the issue was reported, and who reported it. Then, after each issue is assigned and addressed, the user who addressed the issue can add a resolution statement about how the issue was fixed. The problem and resolution dialog are kept together in a log. In addition, you can add notes to the revision lines, and additional fields display to whom the revision is assigned, the expected date, and the status. Each revision is assigned a unique ID.

You can also change the view to show the columns that you need.

You cannot delete a revision. If you find that the revision is not required, enter a resolution statement and flag the revision as a non-issue. For example, during testing a quality assurance representative finds an issue and adds a revision. Upon investigation, the programmer determines that the QA representative missed a step and the issue is working correctly, so the programmer flags the revision as a non-issue.

To add a revision to a tracker:

1. Open the tracker for which you want to add a revision.
2. Use the **Alt-#** hidden hot key to display the Call Tracking Revision screen.
3. Use the **New Revision** hot key to display the Revision Problem Statement screen.
4. In the **Status** field, enter the source of the tracker. The status indicates at what point the problem was found.

   Select one of the following:

   - **Callback –** The issue was reported from a customer site.
   - **QAback –** The issue was found during quality assurance testing.
   - **Question –** Tracker created questions. Often this is a revision that is later labeled a non-issue.
   - **Design –** The issue was reported during the design phase, such as after the customer reviews the design specification and finds an error.
   - **Support –** The issue was found during a support call and revision was created by support personnel.
5. In the **Location** field, indicate where the revision originated, such as a Release 8.0 or Customer for customer call.

   Note: Flag the **Non-Issue** field after a resolution statement has been entered and the problem is a non-issue, such as a question.
6. In the unlabeled field, enter a complete description of the issue.
7. Press **Esc** three times to save your changes and exit the Call Tracking Entry screen.

Forwarding Trackers to Other Users

Use a tracker's forward list to include all the users that need to be notified as work is being done on a tracker. For example, you might have a tracker in your job queue that requires approval by your manager after you complete your portion of the work, or the tracker might require action by users in more than one department. When you append a comment to a tracker, the tracker displays in the job queue for each user on the tracker's forward list.

To forward a tracker to other users:

1. Open a tracker.
2. Use the **Forward** hot key to display the Forwarding screen.

   The system does the following:

   - Populates the **Final Action By** and **Action Req'd By** fields from the tracker's header information.
   - Enters the user ID from the **Action Req'd By** field in the **Forward To** field.
3. In the **Forward To** column, place the cursor on a blank line and enter additional user IDs.

   The user's scheduled availability displays.

   Note: A red, highlighted field displays in the lower, right corner of the Forwarding screen, indicating the user's current status, such as Logged On - Clocked In, Logged On - Clocked Out, or Not Logged In - Clocked In. A yellow highlighted field displays in the upper, left corner of the Forwarding screen, indicating the user's current availability, such as ABC Meeting 9:00-9:30.
4. In the **Status** field, press **F10** and select a new status for the user. Often supervisors change the status for their direct reports, and you can update your own status.

   The system assigns the status of **NewItem** when a new user is added to the tracker.
5. To set an alarm date for a tracker, enter the date in the **Alarm Date** field.

   For example, a customer requires completion of the task described in the tracker by March 4, 2003, and you want to ensure that the tracker is complete before that date. Set the alarm date for March 2, 2003, to allow a two-day grace period for the tracker's completion. The tracker displays in the user's job queue on the alarm date you set.

   Use alarm dates as an additional way to prioritize trackers.
6. In the **Flwup Date** field, enter the date on which you want the entry to appear in the job queue of the recipient. Users set the follow-up date as a means of managing items in their own job queue.

Note: When you append to a tracker, the tracker displays in the job queue of each user on the forward list, even if you entered a future date in the **Flwup Date** field for a user.

7. Use the following hot keys, as necessary:

Hot Key	Function
Final Act	Copies the user ID assigned in the **Final Action By** field to the **Action Req'd By** field and to the **Forward To** field, if it is not already there, indicating which user has the final action for the tracker.
Remove You	Removes your user ID from the **Forward To** field. If your user ID is assigned to the **Action Req'd By** field, the system prompts to assign a new user ID to that field.
Action By	Assigns the user ID of the next person responsible for taking action on this tracker. The **Action By** for the tracker defaults to the user in the **Next Action** field in the tracker header information.
Find	Finds a user ID in the Forward To list that you enter.
Schd Flwp	Displays the Schedule Detail Maintenance screen, where you can schedule an event for the user on which the cursor is positioned.
Contact	Displays the Call Tracking Contact Access screen, which lists the customer or vendor contacts monitoring this tracker through the customer support web site.

8. Press **Esc** to forward the tracker and return to the tracker's main screen.
9. Press **Esc** to save your changes and return to the main menu.

See Also:

Creating Trackers

Closing Trackers

Closing a tracker indicates that the problem or issue for which the tracker was created has been resolved.

To close a tracker, your user ID must be assigned to the **Final Action** field on the Call Tracking Entry screen or you must be designated as a maintenance user for the user ID that is assigned.

If you are authorized to close trackers, consider the following:

- If the tracker's external status *is not* Closed, using the **Close** hot key displays the Close Type screen, which gives you the option to change only the external status or both the external and internal statuses to **Closed**.
- If the tracker's external status *is* Closed, using the **Close** hot key displays the Closing Message screen, where you can enter a closing message to append to the tracker.

Even though you close the tracker and remove yourself from the forwarding list, other users remain on the forward list and the tracker remains in their job queue until they remove themselves from the list.

To close a tracker:

1. Open the tracker that you want to close and use the **Close** hot key.

   Note: You can also select a tracker in your user job queue and use the **Close Item** hot key.

   The system displays the Tracking Hours screen, where you can enter the time spent working on the tracker.
2. Enter the time worked, if applicable, and press **Esc**.
3. Perform one of the following to close the tracker.

   The system displays one of the following prompts:

   - If your user ID is in the **Final Action** field of the tracker's forwarding screen and if you are authorized to close the tracker, the **Close Type** prompt displays.

     From the option list, select one of the following:

     - **Both** – Closes the tracker for internal and external viewers.
     - **External** – Closes the tracker for external viewers only.
   - If your user ID is not in the **Final Action** field of the tracker's forwarding screen but you are authorized to close trackers, the **You are not the Final Action By** prompt displays.

     Select **Close Anyway** from the displayed list to close the tracker.

   The system then displays the Closing Message screen.

4. Type a closing message that explains why you are closing the tracker.

   Use the following hot keys, as needed, to add pre-defined comments to the closing message:

Hot Key	Function
Sel Usr Cmt	Displays the User / Company (*) Defined Comments screen, where you can select a pre-defined comment to add to the closing message.
Edit Usr Cmt	Displays the User Comments Maintenance screen, where you can create or edit a standard comment to add to the closing message.

5. Press **Enter**.

   The system does the following:

   - Updates the tracker with your closing message.
   - Changes the value in the **Ext Status** field on the Call Tracking Entry screen to **Closed**, if you selected **External**.
   - Changes the values in the **Ext Status** and **Int Status** fields on the Call Tracking Entry screen to **Closed**, if you selected **Both.**
   - Replaces your user ID with blanks in the **Final Action** and **Action By** fields on the Call Tracking Entry screen and the **Final Action By** and **Action Required By** fields on the Forwarding screen.
   - Removes your name from the forwarding list and forwards the tracker to all other users on the list.
   - Deletes the tracker from your user job queue.

See Also:

Call Tracking Overview

Call Tracking Entry Hot Keys

Use the hot keys on the Call Tracking Entry screen to perform the following functions:

Hot Key	Function
View	Displays a selection list of records, transactions, or other trackers identified in the tracker comments, which you can display in view-only mode. If the current tracker was spawned from another tracker, the system highlights the **View** hot key in red and lists the tracker from which it was spawned in the list of view options.
Edit	Displays a selection list of records, transactions, or other trackers identified in the tracker comments, which you can display in edit mode.
Log	Displays the Maintenance Log Viewing screen, where you can view the maintenance log entries associated with the tracker.
Find Str	Displays the Job Tracking Search screen, where you can search for text strings within the tracker.
Forward	Displays the forward screen, where you can forward this tracker to other users.
New Append	Displays the Append Message screen, where you can append a comment to the tracker.
Edit Append	Displays the Append Message screen, where you can edit the append on which the cursor is positioned.
Print	Prompts you to print or fax a copy of the tracker, or send an e-mail message. Select one of the following options: • **Default Printer** – By default, the system sends all the appended comments to the printer. To print the tracker with only one appended comment type, press **F10** at the **Show Appends** field and select a type. • **Fax System** – By default, the system only includes External appended comments in the fax. To fax the tracker with another type or with all of the appended comments, press **F10** at the **Show Appends** field and select **ALL** or another type. • **E-mail message** – At the prompt, select the entity's contact to whom to send the e-mail. The system then prompts you to select whether to send a memo or a copy of the tracker. If you send the tracker, the system prompts you to select which appends to copy into the e-mail. The default is External. The system then displays the Send E-mail screen with the selected data.
Copy	Displays the Tracking Log Copy screen, where you can copy or move the current tracker.
Hours	Displays the Tracking Hours screen, where you can view or log the hours you have worked on the tracker.
Sort	Prompts you to change the sort order of the appended comments that follow the original comment in one of the following ways: • **Asnd Date** – Lists appends by ascending date, starting with the oldest append. • **Dsnd Date** – Lists appends by descending date, starting with the most recent append.

Hot Key	Function
Show Append Types	Prompts you to change the append types displayed in the **Comment** section to one of the following: • **All** – Displays all appends, but not the content of secure appends. • **Internal** – Displays only internal appends. • **External** – Displays only external appends. • **Secure** – Displays only secure appends. • **Release Notes** – Displays only release notes. • **All-Note Secure** – Displays all appends, including the content of secure appends.
Close	Closes the tracker.
Notes	Displays the Notes screen, from which you can select the type of internal note to add to the tracker.
Keys	Displays the Keywords screen, where you can add keywords to the tracker. By default the system includes the first line of the original comment in this screen. You can enter additional keywords on this screen to assist you in searching for this tracker using the **Find** hot key.
Contacts	Displays the Contacts screen, which lists the contacts associated with the entity to which the tracker is assigned. Select a contact or **New** to create a new contact. The system displays the Contact Maintenance screen for that contact.
Inq	Displays a selection list from which you can access the following screens associated with the current tracker: • Customer Maintenance or Vendor Maintenance • Contact Maintenance • A/R Inquiry or A/P Inquiry • Customer Activity Log Viewing or Vendor Activity Log Viewing
Sum Hrs	Displays the Summary Hours screen, where you can view the total hours all users have spent working on the tracker.
Spawn	Displays the Spawned Trackers screen, where you can spawn a tracker and, if the hot key is highlighted in red, also view other trackers spawned from the current tracker.

Selecting Trackers from the Quick Access List

The Tracking Log Viewing screen displays a list trackers you have viewed recently.

The number entered in the **Number of Trackers** field in the Number Of Records To Save In User Quick Access Lists control maintenance record determines the number of trackers listed on this screen.

To select a tracker from the quick access list:

1. Display the Track Log Viewing screen in one of the following ways:
   - Press **F10** in the **ID** field of the Call Tracking Entry screen.
   - Press **F10** in the **Trckr#** column on the Tracker Stopwatch screen.
   - Use the **Add Xref** hot key on the Append Message screen.
2. Use the following hot keys, as needed:

Hot Key	Function
View	Displays the selected tracker.
Select	Prompts you to enter selection criteria for filtering the trackers in the list.

3. After selecting a tracker, press **Esc**.

   The system returns to the previous screen and populates the field from which you launched the quick access list with the selected tracker.

See Also:

Opening Trackers

Using Quick Access Lists

Tracking Hours Worked on Trackers Overview

When you display a tracker, the system begins tracking the time the tracker is open. When you close the tracker, the system displays the time you spent and prompts you to record the hours worked, along with a task code identifying the type of work you did.

From the Call Tracking Entry screen you can also use the **Hours** hot key to view or enter your hours. The **Sum Hours** hot key enables you to view a summary of hours worked by all users associated with the tracker.

Use the tracker stop watch, accessed by pressing **Shift-F10** from anywhere in the system, to track the time you spend working on a tracker without having to keep the tracker open while you are working.

Run the Tracking Hours report to summarize the time spent working on trackers. You can use the report to analyze the types of tasks that require the most time.

See the following topics for information about how to log and track your time spent working on a tracker:

- Viewing and Logging Hours to Trackers
- Logging Hours with the Tracker Stop Watch
- Viewing a Summary of Hours Worked on Trackers
- Running the Tracking Hours Report

See Also:

Call Tracking Overview

Viewing and Logging Hours to Trackers

Use the Tracking Hours screen to view the time you logged to a tracker. The screen displays the date, time logged for that date, and task assigned to the logged time for the date.

You can also enter time that you worked on a tracker in the Tracking Hours screen. However, we recommend that you use the tracker stop watch to log time. The tracker stop watch logs time as it accumulates, instead of requiring you to estimate the time you spent working on the tracker.

This topic discusses how to do the following:

- View the time you logged to a tracker.
- Enter hours you worked on a tracker.
- View all hours logged to a tracker by multiple users.

To view the time you logged to a tracker:

1. Open the tracker for which you want to view logged time.
2. Use the **Hours** hot key to display the Tracking Hours screen.

   Note: The screen also displays when you close a tracker or exit a tracker in which you have added or updated an append, or updated the forward list.

   The system displays the screen with the tracker ID, your name, and the current date. If the screen displays and you do not want to record any hours worked, press **F12** to return to the tracker.

To enter hours you worked on a tracker:

1. Open the tracker for which you want to enter hours.
2. Use the **Hours** hot key to display the Tracking Hours screen.
3. In the **Date** field, accept the current date or enter a different date.
4. In the **Task Code** field, press **F10** and select the code that best describes the action you took on the tracker.
5. In the **Hours** field, enter the number of hours worked.

   The system updates the **Total Hours For User** field.
6. Press **Esc** to record the hours.

   Note: You can enter the same date and task code multiple times. When you press **Esc**, the system combines all of the entries with the same date and task code.

To view all hours logged to a tracker:

1. Open the tracker for which you want to view logged time.
2. Use the **Hours** hot key to display the Tracking Hours screen.
3. Use the **Summary Hrs** hot key to display the Summary Hours screen.
4. View the summary information and use the hot keys to view additional information, as described in Viewing a Summary of Hours Worked on Trackers.

See Also:

Tracking Hours Worked on Trackers Overview

Viewing a Summary of Hours Worked on Trackers

Logging Hours with the Tracker Stop Watch

Use the tracker stop watch functionality to log the time you spend working on trackers without having to keep the trackers open.

The Tracker Stopwatch screen displays lapsed time for all trackers on which you are working. On this screen, you can stop tracking time for one tracker and start tracking time for a new tracker. Also, if you are interrupted while working on a tracker, pause the clock for that tracker and start the clock for the new tracker.

To track hours with the tracker stop watch:

1. From any screen in Eclipse, press **Shift-F10** to display the Tracker Stopwatch screen.

   Note: If you have a tracker open and press **Shift-F10** from within the tracker, the system lists the tracker on the screen and adds the time the tracker has already been open to the **Lapse Time** field.

2. To begin tracking time worked on a new tracker, position the cursor on a blank line in the **Trckr#** field and enter the tracker number. You can also press **F10** to display a quick access list of trackers you have recently viewed and select a tracker from the list.

   The system displays a screen showing the active time zone, current time and date, and start time and date.

3. In the **Start Time** field, press **Enter** to accept the current time as the start time or enter a new time.

   For example, you forgot to start the tracker. Indicate the time you started the tracker in the **Start Time** field to get an accurate time count.

4. In the **Start Date** field, press **Enter** to accept the current date as the start date or enter a new date.

   The system returns you to the Tracker Stop Watch screen, begins logging time, and displays the following information:

Field	Description
Tracker Comment	The first line of the **Comments** associated with the tracker.

Field	Description
Lapse Time	The time worked on the tracker. Although the clock continues to run, use the **Refresh** hot key to refresh the displayed time. If you press **Shift-F10** from within a tracker that is already listed on the Tracker Stop Watch screen, but paused, prompts you to start the stop watch again. You can override the time displayed in this field. When you enter a new time, the system prompts you to indicate whether this is a fixed amount of time associated with this tracker or whether the stop watch should continue incrementing the time entered. • If you enter **N** to indicate that the time entered is a fixed amount of time, an asterisk displays to the right of the time. • If you enter **Y** to indicate that the time entered is incremental, an **I** displays to the right of the time.
Taskcode	Press **F10** and select a task code to apply to the logged time.

5. Use the following hot keys, as needed:

Hot Key	Function
Start	Starts the paused stop watch for the tracker on which the cursor is positioned.
Stop	Stops the clock for the tracker on which the cursor is positioned. The system prompts you to enter a task code if you have not already done so. The system saves the data and removes the tracker from the screen.
Pause	Pauses the stop watch for the tracker on which the cursor is positioned. The lapsed time is refreshed and saved, but the tracker does not continue to accumulate time.
Cancel	Cancels the tracking of lapsed time for the tracker on which the cursor is positioned. The system removes the tracker from the screen.
View	Displays the Call Tracking Entry screen in edit mode for the tracker on which the cursor is positioned. • If you are not finished with the tracker but want to exit the Call Tracking Entry screen, press **F12** to exit the tracker and continue accumulating time on the stop watch. • If you are finished with the tracker, press **Esc**. The Tracking Hours screen displays, where you make an entry for the accumulated time worked. When you press **Esc** from the Tracking Hours screen, the system prompts you to **Stop** or **Reset** the stop watch for the tracker.
Refresh	Refreshes the time displayed in the **Lapse Time** field for all listed trackers for which the clock is running.

6. Press **Esc** to exit the Tracker Stop Watch screen and return to your work. The stop watch continues to run for the selected trackers. When you redisplay the screen, the time logged to the trackers displays.

See Also:

Tracking Hours Worked on Trackers Overview

Viewing and Logging Hours to Trackers

Viewing a Summary of Hours Worked on Trackers

Use the Summary Hours screen to view a list of the hours each user spent working on a tracker. The screen displays quoted hours, billed hours, and non-billed hours in view-only mode.

To view a summary of hours worked on a tracker:

1. Open the tracker for which you want to view the hours logged.
2. Use the **Sum Hours** hot key to display the Summary Hours screen.

   The system displays the following information:

Field	Description
Tracking #	The tracker ID.
Invoice #	For Eclipse internal use only.
Quoted Hours	For Eclipse internal use only.
User Name	Each user who has worked on the tracker.
Bill Hours	Total billable hours for each user who has worked on the tracker.
NonBill Hours	Total non-billable hours for each user who has worked on the tracker. **Note:** Billable and non-billable hours are determined by the task code associated with the hours recorded on the Tracking Hours screen. These task codes are defined on the Task Code Maintenance screen.
Total $	For Eclipse internal use only.

3. Use the following hot keys to view more information about the tracker:

Hot Key	Function
Detail Hours	Displays the Tracking Hours screen for the user on which the cursor is positioned.
View	For Eclipse internal use only.

4. Press **Esc** to exit the screen and return to the Call Tracking screen.

See Also:

Tracking Hours Worked on Trackers Overview

Viewing and Logging Hours to Trackers

Online Customer Call Tracking Overview

Use Online Customer Call Tracking on the Eclipse Customer Support web site to enter and track your own customer support requests. When you enter a customer support request, the system creates a new tracker to add to your list of active requests. You can view this list on the Eclipse Customer Support web site.

As Eclipse personnel work toward fulfilling a request or solving a problem, they append messages to the tracker that indicate the progress. After you are satisfied that your request has been resolved and you no longer want to monitor the tracker, remove the tracker from your list of active requests.

Before You Start

To use the Online Customer Call Tracking feature on the Eclipse web site, complete the following:

- Obtain a customer support ID and password.

  The Eclipse office assigns your customer support ID and password. Call 508-778-9151 to obtain your ID and password.

- Ensure that your Web browser, such as Netscape or Internet Explorer, is JavaScript enabled.

See Also:

Entering Customer Support Requests

Tracking and Editing Your Customer Support Requests

Call Tracking Overview

Entering Customer Support Requests

After you receive your support ID and password, you can log into Eclipse Customer Support online and submit requests. The system populates the Support Request screen with your company's name, contact name, and e-mail address. You can change the contact and e-mail address, if necessary.

On the Support Request screen, assign the request a type and a status and enter your request in the provided area.

To enter a customer support request:

1. Start your Web browser and enter **http://distribution.activant.com/eclipse-support/** to display the Eclipse Support login page.
2. In the **User ID** and **Password** fields, enter the user ID and password the Eclipse office assigned to you.

   Note: If necessary, call 508-778-9151 to obtain your ID and password.

4. Click **Login** to display the Customer Support page.
5. Click **Enter a Support Request** under the **Web Care** heading.

   The Enter Support Request page displays with the three fields beneath the **Requested By** heading populated with information from your Eclipse Contact file.
6. Change the entries in the **Contact** and **E-mail** fields, as necessary.
7. In the **Request Type** field under the **About This Request** heading, select a request type from the drop-down list.
8. In the **Category** and **Work Area** fields, select additional subcategories to classify your request.
9. In the **Your Status** field, select a status to assign to the request from the drop-down list.
10. In the **Request** field, type your request.
11. Click **Submit Support Request** to submit your request to Eclipse.

    The system creates a tracker for this request, which you can view and edit online on the View Customer Support Requests page.

See Also:

Online Customer Call Tracking Overview

Tracking and Editing Your Customer Support Requests

Tracking and Editing Your Customer Support Requests

After you submit a request through the Customer Support Request page, the system creates a tracker, which you can monitor and edit on the Eclipse web site.

You can see the progress being made on your request using the View Support Requests page. This page displays all of your active support requests. You can also view other trackers by searching for them on this screen.

From the View Support Requests page, you can access the Support Request page for a tracker, which you can use to edit the original request.

To track and edit your customer support requests:

1. Start your Web browser and enter **http://distribution.activant.com/eclipse-support/** to display the Eclipse home page.
2. Click the **Support** link located in the top navigation bar to display the Customer Support page.
3. In the **User ID** and **Password** fields, enter the user ID and password the Eclipse office assigned to you.
4. Click **Login** to display the Eclipse Customer Support page.
5. Select **View Support Requests** under the **Web Care** heading to display your active support requests.

   Note: If you do not see the tracker you want to view in the current list, enter the tracker ID or a keyword in the **Search** field. Click **Search** to locate the tracker. If the system locates the tracker, it displays in your list.

   The system displays the following information.

Column Heading	Function
View Selected	Select a check box and click the View Selected link to display the Support Requests page for the designated tracker.
Entered	Date the request was entered.
Updated	Date the tracker was last updated.
Support Request	Tracker ID that the Eclipse system assigned. Click the tracker ID to display the Support Requests page for that tracker.
Exp Date	Expiration date for the request, if assigned one.
Description	Original description you entered for the request.
C:Company Status	Request type you assigned to the request.
Y:Your Status	Status you assigned to the request.
E:Eclipse Status	Status Eclipse assigned to the tracker.

6. Select a request to edit in one of the following ways:
   - Select the box in the **View Selected** column next to the tracker to edit and click the **View Selected** link.
   - Click a tracker number in the **Support Request** column.
7. Do any of the following to edit the request:
   - In the **Company Status** field, select a new status from the drop-down list.
   - In the **Add a Comment** field, enter an append message and click **Update Tracker** to update the request.

   Note: You cannot append to a tracker with a closed status.

   - Click **Remove Tracker from My Requests** to remove the request from your list on the View Support Requests page.
   - Under the **Add New Contacts** heading, select new Eclipse personnel to add to the tracker and click **Update Forward List** to add the new contacts to the tracker's forward list.

   Note: You can also assign a status for the contacts on the forward list by clicking the **Select A Status** list and selecting a status.

   - Under the **Contact** heading, either remove the contact or assign a new status.
8. Close the page in one of the following ways:
   - Click the **Back** button on the toolbar.
   - Click **Support Log Off**.

See Also:

Online Customer Call Tracking Overview

Entering Customer Support Requests

Call Tracking Maintenance Overview

The system uses tracker categories, work areas, sub areas, and task codes for reporting, billing, and sorting purposes. Use the tracker maintenance screens to define these items.

Call Tracking Categories, Work Areas, and Sub Areas

Categories, work areas, and sub areas are groups within the system that you can assign to trackers for reporting and unquality event tracking purposes.

- **Categories –** Identify major groups to which you can assign trackers, such as ACCOUNTING or SALES.
- **Work areas –** Identify groups within a category, such as PAYABLES within ACCOUNTING.
- **Sub areas –** Identify groups within a work area, such as WORK ORDERS within PAYABLES within ACCOUNTING.

Use the Category/Work Area/Sub Area Maintenance screen to define categories, work areas, and sub areas. You can also use this screen to print a list of the defined groups.

Use the Category Maintenance screen to maintain categories and the Work Area Maintenance screen to maintain work areas.

Tracker Task Codes

Use tracker task codes to categorize the time you spend working on trackers for reporting purposes. For example, if you are working on an accounting tracker and collecting payments, assign the task code **COLLECTION** to the hours you work on the tracker.

Create task codes in the Call Tracking Task Code Maintenance screen. Assign task codes to trackers from the Tracker Stop Watch or the Summary Hours screens.

See Also:

Call Tracking Overview

Defining Tracker Categories, Work Areas, and Sub Areas

Maintaining Tracker Categories

Maintaining Tracker Work Areas

Maintaining Tracker Categories

Defining Tracker Categories, Work Areas, and Sub Areas

For reporting and unquality event tracking purposes, you can assign trackers to one, two, or three pre-defined reporting groups.

- **Categories** – Identify major groups to which you can assign trackers.
- **Work areas** – Identify groups within a category.
- **Sub areas** – Identify groups within a work area.

For example, if there is a network problem with a terminal computer in your warehouse, you might assign the tracker to the SYSTEM category, DESKTOP work area, and CONNECTIVITY sub area. If you are reporting an application issue, you might assign the tracker to the APPLICATION category, ORDER ENTRY work area, and LOT BILLING sub area.

This topic describes how to do the following:

- Create a tracker category.
- Create a tracker work area.
- Create a tracker sub area.

To create a tracker category:

1. From the **System > System Files > Call Tracking Maintenance** menu, select **Category/WorkArea/SubArea Maintenance** to display the Category Maintenance screen.

   The screen displays the defined categories.

2. Position the cursor on a blank line or press **Alt-Insert** to insert a new line, and enter a category name up to 20 characters.

   Note: To delete a category, position the cursor on the category and press **Alt-Delete**.

3. Use the following hot keys, as needed:

Hot Key	Function
Work Areas	Displays the Work Area Maintenance screen, where you can create work areas for the category on which the cursor is positioned.
Print	Displays the Category Report screen, where you can print a report listing each category and the corresponding work areas and sub areas.

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

To create a tracker work area:

1. From the **System** > **System Files** > **Call Tracking Maintenance** menu, select **Category/WorkArea/SubArea Maintenance** to display the Category Maintenance screen.
2. Position the cursor on a category and use the **Work Area** hot key to display the Work Area Maintenance screen.

   The screen displays the work areas defined for the selected category.
3. Position the cursor on a blank line or press **Alt-Insert** to insert a new line, and enter a work area name up to 20 characters.

   Note: To delete a work area, position the cursor on the work area and press **Alt-Delete**.
4. To create sub areas for the work area on which the cursor is positioned, use the **Sub Areas** hot key and continue with the next procedure.
5. Press **Esc** to save your changes.

To create a tracker sub area:

1. From the **System** > **System Files** > **Call Tracking Maintenance** menu, select **Category/WorkArea/SubArea Maintenance** to display the Category Maintenance screen.
2. Position the cursor on a category and use the **Work Area** hot key to display the Work Area Maintenance screen.

   The screen displays the work areas defined for the selected category.
3. Position the cursor on a work area and use the **Sub Area** hot key to display the Sub Area Maintenance screen.

   The screen displays the sub areas defined for the selected category and work area.
4. In the **Sub Area Name** column, position the cursor on a blank line or press **Alt-Insert** to insert a new line, and enter a sub area name up to 20 characters.

   Note: To delete a sub area, position the cursor on the sub area and press **Alt-Delete**.
5. In the **QA Group** column, enter the quality assurance group associated with the designated sub area. This field is optional.
6. Press **Esc** to save your changes.

See Also:

Call Tracking Maintenance Overview

Creating a Tracker

Maintaining Tracker Categories

Use the Category Maintenance screen to edit the work areas assigned to tracker categories.

To maintain a tracker category:

1. From the **System > System Files > Call Tracking Maintenance** menu, select **Call Track Category Maint** to display the Category Maintenance screen.
2. In the **Category** field, press **F10** and select the category for which you want to edit the work areas. You can also select **New** and then enter a new category.

   Note: To delete the category and associated work areas, use the **Delete Category** hot key.

3. In the **Work Area** field, do any of the following:
   - To add a work area, position the cursor on a blank line or press **Alt-Insert** to insert a new line and enter a work area name up to 20 characters.
   - To delete a work area, position the cursor on the work area to delete and press **Alt-Delete**.
4. Press **Esc** to save your changes.

See Also:

Call Tracking Maintenance Overview

Maintaining Tracker Work Areas

Use the Work Area Maintenance screen to edit the work areas assigned to tracker categories.

To maintain a tracker work area:

1. From the **System > System Files > Call Tracking Maintenance** menu, select **Work Area Maintenance** to display the Work Area Maintenance screen.
2. In the **Work Area** field, press **F10** and select the work area for which you want to edit the sub areas. You can also select **New** and then enter a new work area.

   Note: To delete the category and associated work areas, use the **Delete Area** hot key.

3. In the **Work Area** field, do any of the following:
   - To add a work area, position the cursor on a blank line or press **Alt-Insert** to insert a new line and enter a sub area name up to 20 characters.
   - To delete a sub area, position the cursor on the work area to delete and press **Alt-Delete**.
4. Press **Esc** to save your changes.

See Also:

Call Tracking Maintenance Overview

Defining Tracker Task Codes

Use the Call Tracking Task Code Maintenance screen to identify the types of work required to resolve trackers.

When you define tasks, indicate whether they are billable or non-billable. If they are billable, set up a miscellaneous charge product whose unit cost equals the hourly rate. Then, associate the task code with the miscellaneous charge product in Task Code Maintenance.

For example, you create a task code for delivering plumbing supplies and name it **plumb deliv**. Then you create a miscellaneous charge product for the task code, **plumbing deliv prod,** and assign it a unit cost of **$2.00**. On the Task Code Maintenance screen, you enter **plumbing deliv prod** as the product description for the **plumb deliv** task code. Time tracked to this task code bills at $2.00 per hour. So, if a delivery takes four hours for a customer, that customer is charged $8.00 for the delivery.

Assign task codes for time logged to a tracker on the Tracker Stop Watch or Summary Hours screens.

To define a tracker task code:

1. From the **System > System Files > Call Tracking Maintenance** menu, select **Call Tracking Task Code Maint** to display the Call Tracking Task Code Maintenance screen.
2. Position your cursor on a blank line.
3. In the **Task Code** field, enter the task code name, using up to 10 characters.
4. In the **Description** field, enter a short description for the task code.
5. In the **Bill** field, enter **Y** or **N** to indicate whether this task code is billable.
6. If the task code is billable, in the **Product Description** field, enter the name of the miscellaneous charge product that you defined for this task code.

   If needed, use the **Product Maint** hot key to display the Product Maintenance screen where you can define or search for miscellaneous charge products.
7. Press **Esc** to save the task codes and return to the main menu.

See Also:

Call Tracking Maintenance Overview

Tracking Hours Worked Overview

Creating Standard User and Company Comments

Create standard user and company comments to use when appending to trackers, entering tracker closing comments, and entering fax memo comments. In situations where you frequently append the same comment to trackers, using a pre-defined comment contributes to consistency and accuracy, as well as saves time.

For example, you can create a pre-defined comment for each order status, such as "Order placed. Will call when complete."

To create a standard user or company comment:

1. Do one of the following to display the User Comments Maintenance screen:
   - On the Append Message screen, use the **Edit Cmt** hot key.
   - From the Send E-mail screen, use the **Edit Usr Cmt** hot key.
   - From a tracker's Closing Message screen, use the **Edit Usr Cmt** hot key.
   - From the Fax Memo screen, use the **Edit User Comments** hot key.
2. In the **User ID** field, enter the ID to whom you want to make the comments available for selection. The system populates the field with your user ID.

   Do one of the following:
   - To create or edit company-defined comments, use the **Company Cmts** hot key. Your ID is then replaced with **Company**, and the comments you create and edit become company-defined comments.
   - To change the **User ID** field back to your ID, use the **User Cmts** hot key.
3. In the **Comment ID** field, press **F10** and select a comment ID or **New**.
4. Enter or edit the comment.
5. Use the following hot keys, as needed:

Hot Key	Function
Append Cmt	Appends the displayed comment to the screen from which you accessed the comment.
Company Cmts	Populates the **User ID** field with the value **COMPANY**, so the comment you enter will be a company-wide comment.
User Cmts	Populates the **User ID** field with your user ID, so the comment you enter will be a user-defined comment.
Delete Cmt	Deletes the currently displayed comment.
Copy Cmt	Displays the **Enter New Comment ID to Copy to prompt**, where you can assign a new ID to the copied comment. To edit the copied comment, enter the new ID in the **Comment ID** field and edit the displayed text.

6. Press **Esc** to exit the User Comments Maintenance screen and save the comments.

Activity Logs Overview

Activity logs are permanent archives of comments, system-generated log entries, or trackers assigned to customers, vendors, users, products, EDI transactions, or system activities.

When necessary, the system administrator can purge activity logs.

Entity Activity Logs

Every customer, vendor, and user in the system has an activity log, which contains the trackers assigned to that customer, vendor, or user. Every time you create a tracker, you must assign the tracker to a customer, vendor, or user. The system then stores the tracker in the designated entity's activity log.

The system places *copies* of trackers in the job queues of users on the trackers' forward lists. When users remove their IDs from tracker forward lists, the system removes the tracker copies from the users' queues, but the trackers continue to reside permanently in their activity logs.

Product Activity Logs

Product activity logs record events that affect the quantities and locations of products in your warehouse. The log is a permanent repository for this information and maintenance is not required. To view a product's activity log, use the **Log** hot key located on various product related screens, such as Inventory Inquiry, Inventory History Ledger, or Product Location Maintenance. When necessary, you can add additional comments using the Product Activity Log Entry screen.

Remote Activity Log

The Remote Activity Log records all the activity associated with remote transactions, such as BCXML, to and from Eclipse. From the activity log, you can drill down to the transaction details, such as the system-generated order for a customer's order submit transaction.

System Activity Log

The System Activity Log records events such as program compiles, e-commerce transfers, file saves, system backups, and record purges. It also logs users dialing into and exiting the system. When necessary, Eclipse Support personnel can create system activity log entries.

EDI Activity Log

The EDI Activity Log contains a summary of transmission connection attempts, actual connections, and transaction information, such as whether a document was sent or received. The log is a permanent repository for this information and maintenance is not required. Use the log to monitor the daily activity of EDI programs.

Use the Remote Activity Log to view all the activity associated with remote XML transactions to and from Eclipse. From the activity log, you can drill down to the transaction details, such as the system-generated order for a customer's order submit transaction.

Viewing Entity Activity Logs

Use the Customer, Vendor, and User Activity Log Viewing screens to view trackers and other log entries that are assigned to these entities and stored in their activity logs.

The activity log viewing screens for each entity type have the same format. From this screen, you can view and edit the trackers stored in the activity log.

> **Note:** You must be authorized to access activity logs other than your own. You must also be authorized to view and edit trackers submitted by other users.

To view an entity activity log:

1. Display the activity log viewing screen in one of the following ways:
   - From the **A/R** menu, select **Customer Activity Log Viewing** to display the Customer Activity Log Viewing screen.
   - From the **A/P** menu, select **Vendor Activity Log Viewing** to display the Vendor Activity Log viewing screen.
   - From the **System** menu, select **User Activity Log Viewing** to display the User Activity Log Viewing screen.
2. In the **Cus Name**, **Ven Name**, or **User ID** field, enter the entity's ID.
3. In the **End Dt** field, press **Enter** to view trackers that have an expected date less than or equal to the currently displayed date. You can change the date.

   The trackers display in date and time sequence, with the most recent trackers listed first. The screen displays the following information for each log entry:

Field	Description
User ID	User ID of the person who assigned the tracker to this activity log.
Date	Date the tracker was created.
Time	Time the tracker was created.
Comment	Text of the original comment appended to the tracker or text of the log entry the system created. **Note:** This field displays when you select the Comment view. This is the default.
Problem/Solution	Text of the tracker's problem and solution comments or text of the log entry the system created. **Note:** This field displays when you select the Problem/Solution view.

> **Note:** If the Default Customer Activity Source In A/R Inquiry control maintenance record is set to **COLLECT**, the system uses this default as the selection criteria for viewing the entries in the customer activity log.

4. Use the following hot keys, as needed:

Hot Key	Function
View	Displays a list of entity, product, tracker, and order IDs referenced in the tracker. From the list, select an ID to view the associated record or transaction.
Edit	Displays a list of entity, product, tracker, and order IDs referenced in the tracker. From the list, select an ID to edit the associated record or transaction.
Sel	Displays a screen, where you can enter tracker selection criteria. **Note:** You can use this hot key before or after populating the log viewing screen.
New	Displays the Call Tracking Entry screen, where you can create a tracker assigned to this activity log. The system populates the name, security level, and date, and assigns a tracker number to the item.
Edit Itm	Displays the Call Tracking Entry screen in edit mode for the tracker on which the cursor is positioned.
App	Displays the Append Message screen, where you can append a comment to the tracker on which the cursor is positioned.
Expand	Changes the view to show the expanded text in the **Comment** or **Problem/Solution** column for each tracker.
Synop	Changes the view to show only the first line of text in the **Comment** or **Problem/Solution** column for each tracker.
JobQ	Displays the User Job Queue Viewing screen, where you can view your job queue.
Chng View	Changes the screen view to display one of the following columns on the right side of the screen: • **Comment** • Problem/Solution

5. Once you have finished working with the trackers, press **Esc** to exit the screen.

See Also

Activity Logs Overview

Viewing Maintenance Logs

Entering Activity Log Selection Criteria

Use the Activity Log Selection Criteria screen to select a subset of the items to display on the Activity Log Viewing screens.

To enter activity log selection criteria:

1. Display an Activity Log Viewing screen and use the **Sel** hot key.
2. For any of the items listed in the **Select Prompt** column, do the following:
   - In the **Select Type** field, select how to use the select value.
   - In the **Select Value** field, enter one or more values to use as selection criteria.

Select Prompt	Select Type	Select Value
Text String	• Containing • Not Containing • Beginning With • Ending With • Exact Match	String of characters in the tracker comments.
Sec Level	• Equal To • Not Equal To	Security level assigned to the tracker.
From User	• Equal To • Not Equal To	ID of the user who entered the tracker.
Source	• Equal To • Not Equal To	Source assigned to the tracker.
Status	• Equal To • Not Equal To	Status assigned to the tracker.
Entity	• Equal To • Not Equal To	Entity to which the tracker is assigned.
Category	• Equal To • Not Equal To	Category to which the tracker is assigned.
Work Area	• Equal To • Not Equal To	Work area to which the tracker is assigned.
Sub Area	• Equal To • Not Equal To	Sub area to which the tracker is assigned.
Priority	• Equal To • Not Equal To	Priority assigned to the tracker.
Int Status	• Equal To • Not Equal To	Internal status assigned to the tracker.
Ext Status	• Equal To • Not Equal To	External status assigned to the tracker.

Select Prompt	Select Type	Select Value
Next Action	• Equal To • Not Equal To	ID of the user assigned to the **Next Action** field.

3. Use the following hot keys, as needed:

Hot Key	Function
Multi	Displays the Text String Selection screen, where you can enter multiple values for the selected prompt.
Clear Select	Clears all the values entered in the **Select Value** column.

4. Press **Esc** to start the selection process and display the selected trackers on the Activity Log Viewing screen.

See Also:

Managing Your User Job Queue

Viewing Maintenance Logs

Maintenance logs track and record changes made to fields in records throughout the system. When you make branch-specific changes to a record, the system displays the designated branch in the log entry. The system also records your responses to the **Reason for Change** prompt when you exit screens after making changes.

You must enable maintenance logging for a file before the system can record information for that file. For more information, see Setting Maintenance Logging Parameters.

To view a maintenance log:

1. From any screen that has a **Log** hot key, use that hot key to display the Maintenance Log Viewing screen.

   The system populates the fields with the following maintenance log information:

Column	Description
File	The file name of the system program where you made changes, such as TRACKING.LOG, PRODUCT, MATRIX, or CUSTOMER.
Item	The first line from the record, such as a customer or product description, or the first comment from the tracker in Call Tracking.
User ID	The user ID of the person who made the change to the record or tracker.
Date	The date of the change.
Time	The time of the change, including the time zone.
Description	The description of the change. The system records the following: • System-generated changes, such as field changes when a tracker was created, or branch-specific changes to products or entities. • User-entered messages, such as reasons for making changes to records. The amount of detail displayed in this field depends on the entry in the **Maint Logging** field on the File Definitions Maintenance screen.

2. Use the following hot keys, as needed:

Hot Key	Description
Synop	Displays only the first line of each entry's description.
Expand	Displays all lines of each entry's description.
View	Attached transactions included in the comments.
Select	Enter criteria to use to locate a change in a log.

3. Press **Esc** to return to the previous screen.

See Also:

Setting Maintenance Logging Parameters

Viewing Change Logs

Change logs track and record changes made to transaction records, such as cash receipts, stock receipts, rental agreements, and orders. View a change log to see the transaction's history. You can view who changed the transaction, when it was changed, and why. Because you cannot edit the log, it provides a secure audit trail for each order and each order generation.

To view a change log:

1. Do one of the following to display the Change Log Viewing screen:
   - On the SOE Header screen use the **Chg Log** hot key.
   - On the POE Header screen use the **Chg Log** hot key.
   - On the TOE Header screen, use the **Change Log** hot key.
   - On the WOE Header screen, use the **Change Log** hot key.
   - On the Stock Receipts Header screen, use the **Chg Log** hot key.
   - On the A/P Entry screen, use the **Chng Log** hot key.
   - On the Cash Receipts screen, use the **Log** hot key.
   - On the Rental Agreement Entry Header screen, use the **Change Log** hot key.
2. Review the following fields, as needed, for each transaction:

Field	Description
Change Log for	The transaction number.
ShipDate/Inv#	The shipment date of the transaction generation or the invoice number. To view changes for a different ship date or invoice, use the **Change ShipDate/Inv#** hot key.
User ID	The user who made the change.
Date	The date the user made the change.
Time	The time the user made the change.
Port	The terminal port from which the change was made.
Comment	A system-generated description of each change, or user comments.

3. Use the following hot keys, as needed.

Hot Key	Function
Change ShipDate/Inv#	Displays a selection list of the transaction generations. Select a date and press **Enter** to display the change log entries for that ship date. Select **ALL** and press **Enter** to display the change log entries for all ship dates.
View	Displays the transaction in view-only mode.
Edit	Displays the transaction in edit mode.

Hot Key	Function
Add Comment	Displays a selection list of the transaction generations. Select a date and then enter a comment at the Reason for Change prompt. The system adds your comments as a log entry.

4. Press **Esc** to return to the Header screen.

See Also:

Running the Nonstock Products Returned Report

User Job Queue Overview

Each Eclipse user has a job queue. Your job queue is an electronic to-do list that contains copies of trackers with your user ID on their forward list. The system adds a copy of a tracker to your job queue when someone adds your user ID to the tracker's forward list. The system removes the tracker copy from your job queue when you remove your user ID from the tracker's forward list.

> **Note:** Trackers permanently reside in the activity logs to which they have been assigned, even when all user IDs have been removed from the tracker's forward list.

Use your job queue to manage your trackers. From the queue, you can do the following:

- Drill down into trackers to review them.
- Assign statuses so that you can know tracker priorities at a glance.
- Sort trackers so that you can view them in order of importance.
- Select trackers to display based on selection criteria, so you do not have to view all your trackers at once.
- Select display options so you can view the most important information right from the queue.
- Remove trackers from your queue when you no longer need to monitor them.

See Also:

Setup Requirements for User Job Queues

Managing Your User Job Queue

Trackers, Logs, and Queues Overview

Managing Your User Job Queue

Use the User Job Queue Viewing screen to view and manage the trackers in your user job queue. From this screen you can access the Call Tracking Entry screen for the tracker on which the cursor is positioned to review all information in the tracker.

To manage your user job queue:

1. Display the User Job Queue Viewing screen in one of the following ways:
   - From the **System** menu, select **User Job Queue Viewing**.
   - From any screen in the system, press **Shift-F3**.
2. In the fields listed in the table, do either of the following:
   - Press **Enter** to accept the defaults or enter new values.
   - Use the **Select** hot key to enter additional selection criteria before displaying the queue.

Field	Description
User ID	Press **Enter** to view trackers in your queue or enter another user ID to view the trackers in that user's queue.
End Dt	Press **Enter** to accept the current date or enter another date. Enter future dates in the **End Dt** field to display entries with followup or alarm dates that are later than the current date.
SelType	Press **Enter** to accept the current selection type or press **F10** and select one of the following: • **Followup** – Displays all the trackers where your user ID is included in the **Forward To** field on the Forward screen. • **Action Reqd** – Displays only the trackers where your user ID is included in the **Action Reqd By** field on the Forward screen. • **Final Action** – Displays only the trackers where your User ID is included in the **Final Action By** field on the Forward screen. • **All** – Displays all trackers where your user ID is included in either the **Forward To** field or the **Final Action** field on the Forward screen.

The system lists each selected tracker in the queue. At the top of the queue are the trackers that others have updated but you have not yet reviewed. A caret (^) precedes each of these trackers. The system then lists all the other selected trackers according to the default sort option.

The screen can display the following information, depending on the selected view and display option.

Field	Description
FlwUp Dt	Followup date from the **Flwup Date** field associated with your user ID on the tracker's forward screen.
Exp Date	Expected date from the tracker's **Expected Dt** field.

Field	Description
Deliv Dt	Delivery date from the tracker's **Delivery Dt** field.
Track ID	Tracker ID from the tracker's **ID** field.
Customer	Customer, if any, to which the tracker is assigned.
Assigned	ID of user assigned to the tracker's **Next Action** field.
Status	Status assigned to the tracker for your user ID. You can enter a new status in this field, or you can edit the tracker and change the status on the forwarding screen.
Trackers	First line of the initial tracker comment.
Release Notes	The first line of text in the release notes for the tracker.
Keywords	The first line of keywords stored for the tracker.
Problem/Solution	The first line of text in the problem/solution statement for the tracker. Use the **Expand Line** hot key to expand this field to display the entire comment.

3. Use the following hot keys, as needed:

Hot Key	Function
View	Displays a list of entity, product, tracker, and order IDs referenced in the tracker. From the list, select an ID to view the associated record or transaction in view-only mode. If the current tracker was spawned from another tracker the system highlights the **View** hot key and lists the tracker from which it was spawned in the list.
Edit	Displays a list of entity, product, tracker, and order IDs referenced in the tracker. From the list, select an ID to view the associated record or transaction in edit mode.
Select	Displays a selection criteria screen, which you can use to select a subset of the items in the queue for display on the User Job Queue Viewing screen.
New Item	Displays the Call Tracking Entry screen, where you can create a tracker.
Edit Item	Displays the selected tracker on the Call Tracking Entry screen in edit mode.
Close Item	Closes the selected tracker. The system prompts you to enter a closing message and then removes your user ID from the tracker. **Note:** To close a tracker your user ID must be listed in the **Final Action** field of the tracker or you must be designated as a maintenance user for the user ID that is assigned.
Forward	Displays the forwarding screen for the tracker on which the cursor is positioned, where you can add IDs of users to receive a copy of this tracker in their user job queue.

Hot Key	Function
Print Q	Generates a report of the trackers in the queue. The system prompts you to complete the following fields: • **View/Print/Fax** – Select whether to view, print, or fax a copy of the report. • **Show Append Comments** – Select whether to include internal, external, secure, or all tracker comments in the report.
Change View	Prompts you to select a view to change the tracker information displayed in the left columns of the User Job Queue Viewing screen. The system saves the view you select as the default for displaying the queue.
Sort By	Prompts you to select a sort option to change the sort order of trackers in the queue. The system uses the sort option you select as the default for displaying the queue.
Expand	Expands the text displayed in the right column from showing only the first line of text for each tracker to showing one of the following: • **Original** – Complete text of the original comment. • **Total** – Complete text of all appended comments. **Note:** After you use this hot key, the name changes to **Synops**.
Synops	Contracts the text displayed in the right column to show only the first line of the original comment for each tracker. **Note:** After you use this hot key, the name changes to **Expand**.
Append	Displays the Append Message screen for the selected tracker, where you can add a comment to the tracker.
Display Opt	Changes tracker text displayed in the right column of the User Job Queue Viewing screen to one of the following: • Trackers • Release Notes • Keywords • Problem/Solution
Expand Line	Expands the text displayed in the right column for the selected tracker to show the complete comment.
Review	Returns the selected tracker to review mode by inserting a caret (^) at the beginning of the tracker entry. All trackers preceded by a caret automatically sort to the top of the list.

4. Press **Esc** to exit the queue.

See Also:

User Job Queue Overview

Call Tracking Overview

Entering User Job Queue Selection Criteria

Use the User Job Queue Selection Criteria screen to select a subset of the items to display on the User Job Queue Viewing screen.

To enter user job queue selection criteria:

1. Display the User Job Queue Viewing screen and use the **Select** hot key.
2. For any of the items listed in the **Select Prompt** column, do the following:
   - In the **Select Type** field, select how to use the select value.
   - In the **Select Value** field, enter one or more values to use as selection criteria.

Select Prompt	Select Type	Select Value
Text String	• Containing • Not Containing • Beginning With • Ending With • Exact Match	String of characters in the tracker comments.
Sec Level	• Equal To • Not Equal To	Security level assigned to the tracker.
From User	• Equal To • Not Equal To	ID of the user who entered the tracker.
Source	• Equal To • Not Equal To	Source assigned to the tracker.
Status	• Equal To • Not Equal To	Status assigned to the tracker.
Entity	• Equal To • Not Equal To	Entity to which the tracker is assigned.
Category	• Equal To • Not Equal To	Category to which the tracker is assigned.
Work Area	• Equal To • Not Equal To	Work area to which the tracker is assigned.
Sub Area	• Equal To • Not Equal To	Sub area to which the tracker is assigned.
Priority	• Equal To • Not Equal To	Priority assigned to the tracker.
Int Status	• Equal To • Not Equal To	Internal status assigned to the tracker.
Ext Status	• Equal To • Not Equal To	External status assigned to the tracker.

Select Prompt	Select Type	Select Value
Next Action	• Equal To • Not Equal To	ID of the user assigned to the **Next Action** field.

3. Use the following hot keys, as needed:

Hot Key	Function
Multi	Displays the Text String Selection screen, where you can enter multiple values for the selected prompt.
Clear Select	Clears all the values entered in the **Select Value** column.

4. Press **Esc** to start the selection process and display the selected trackers on the User Job Queue Viewing screen.

See Also:

Managing Your User Job Queue

User Job Queue Statuses

The system administrator or authorized users create system-wide tracker statuses in the Valid User Job Queue Statuses control maintenance record. All users can assign these statuses to their trackers.

You can also create personal tracker statuses, which you can use in addition to the system-wide statuses.

> **Note:** When your user ID is added to a tracker, the system assigns the tracker a status of **Newitem**.

When another user updates a tracker and forwards it to you, the tracker moves to the top of your User Job Queue Viewing list. The tracker is preceded by a caret (^) indicating that it has been updated and that you have not opened the tracker since the update was made. After you review the tracker, the system removes the caret. The next time you enter the User Job Queue Viewing screen, the system lists the tracker according to its status.

See Also:

Managing Your User Job Queue

User Job Queue Overview

Removing Trackers from Your User Job Queue

You can remove trackers from your user job queue by doing one of the following:

- Remove your user ID from the tracker's forwarding list.
- Close the tracker.

  Note: To close a tracker, you must be authorized or your user ID must appear in the **Final Act** field on the tracker's forward screen.

To remove your user ID from a tracker's forwarding list:

1. Display your user job queue.
2. Open the tracker from which you want to remove your ID.
3. Use the **Forward** hot key to display the forwarding screen.
4. Use the **Remove You** hot key.

   The system deletes your user ID from the tracker's forwarding list and removes the tracker from your queue.

To remove a tracker from your queue by closing it:

1. Display your user job queue.
2. Select the tracker you want to close and use the **Close Item** hot key, or open the tracker you want to close and use the **Close** hot key.

   The system responds, as follows:

   - If your user ID is in the **Final Act** field of the tracker's forward screen and if you are authorized to close trackers, the system prompts you to select what to close. See step 2.
   - If your user ID is not in the **Final Act** field of the tracker's forward screen but you are authorized to close trackers, select **Close Anyway** from the option list. See step 2.
   - If you are not authorized to close trackers, you must select either **Abort Close** or **Remove Me From Followup** from the option list.

2. From the option list, select **Both** to close the tracker completely, or select **External** to close the tracker for external viewers but leave it open for internal viewers.
3. Enter a closing message and press **Esc** to close the tracker.

   The system deletes the tracker from your queue and forwards it to all other users on the tracker's forward list so that they know you have closed the tracker.

See Also:

Managing Your User Job Queue

Common Work Queues and Activity Logs

Queues are electronic to-do lists that provide an efficient way to monitor the processes in your company in a timely fashion. Activity logs are permanent archives of comments, system-generated log entries, or trackers assigned to customers, vendors, users, products, EDI transactions, or system activities.

Following are common work queues and activity logs, along with their menu paths and purposes.

Activity Logs

The following tables describe the frequently used activity logs in the Eclipse system.

Customer Activity Log

Purpose	Information Displayed	Menu Path
Use the Customer Activity Log to view or edit trackers assigned to a customer.	Archive of customer trackers. Use a purge utility to delete items.	From the **A/R** menu, select **Customer Activity Log Viewing**.

User Activity Log

Purpose	Information Displayed	Menu Path
Use the User Activity Log to view or edit all trackers assigned to a user.	Archive of trackers assigned to a user. Use a purge utility to delete items.	From the **System** menu, select **User Activity Log Viewing**.

Vendor Activity Log

Purpose	Information Displayed	Menu Path
Use the Vendor Activity Log to view or edit trackers assigned to a vendor.	Archive of vendor trackers. Use a purge utility to delete items.	From the **A/P** menu, select **Vendor Activity Log Viewing**.

Product Activity Log

Purpose	Information Displayed	Menu Path
The Product Activity Log records events that affect the quantities and locations of products in your warehouse.	Product activity. Use a purge utility to delete items.	Use the **Log** hot key on various product related screens, such as Inventory Inquiry, Inventory History Ledger, or Product Location Maintenance.

Sales Queues

The following tables describe the sales queues in the Eclipse system.

Customer Calling Queue

Purpose	Information Displayed	Menu Path
Use the Customer Calling Queue to monitor open orders in the system. For example, use it to monitor those orders where a customer is waiting for a follow-up call (as in the **Call When Available** or **Call When Complete** order statuses).	Generation status codes: • The order is complete. • A line item is complete. • An item is available. • The indicated date has arrived.	From the **Orders** > **Queues** menu, select **Customer Calling Queue**.

Bid Follow Up Queue

Purpose	Information Displayed	Menu Path
Use the Bid Follow Up Queue to view, edit, and follow up on bids.	Orders that you entered in bid mode, with a followup date. The bid appears in this queue on the followup date. Once you acknowledge it, the system removes the bid from the queue.	From the **Orders** > **Queues** menu, select **Bid Follow Up Queue**.

Open Order Status Review Queue

Purpose	Information Displayed	Menu Path
Use the Open Order Status Review Queue to: • Verify ticket printing for warehouse personnel. • Check the status of an order. • Check which orders are on credit hold and ready to print.	• Printed tickets. • Order status.	From the **Orders** > **Queues** menu, select **Open Order Status Review Queue**.

Lot Order Status Review Queue

Purpose	Information Displayed	Menu Path
Use the Lot Order Status Review Queue to monitor and expedite open lot item orders.	Depending on your selections, one of the following: • Lot item orders from a customer or vendor perspective based on either a price or cost basis. • Orders based on a percent complete. • Orders with no shipments or invoicing activities by date. • Orders based on complete date, ship date, or followup date. • Shipments that are on hold for vendor release.	From the **Orders** > **Queues** menu, select **Lot Order Status Review Queue**.

Open Work Order Queue

Purpose	Information Displayed	Menu Path
Use the Open Order Work Queue to manage work orders. You can set the work orders with material available in process.	Work orders: • With enough material to release them. • Whose start date is before the available date for the material. • Scheduled to start in the future. • All open work orders.	From the **Order** > **Queues** menu, select **Open Work Order Queue**.

Product Serial Queue

Purpose	Information Displayed	Menu Path
Use the Detail Product Serial Queue as a tool for checking the accuracy of information for products with inbound or outbound serial numbers.	By branch and buy line, products where: • The on-hand quantity does not equal the serial number quantity. • The serial number quantity does not equal the total number of serial numbers.	From the **Orders** > **Queues** menu, select **Product Serial Queue**.

Remote Order Entry Review Queue

Purpose	Information Displayed	Menu Path
Use the Remote Order Entry Review Queue to review orders submitted through Remote Order Entry before they enter the system to be processed. You can also review new and changed bids.	• Remote order entries. • New bids. • Edited bids.	From the **Orders** > **Queues** menu, select **Remote Order Entry Review Queue**.

Note: At least one user in your organization must be responsible for reviewing items on this queue and clearing them from order entry processing.

Unearned Revenue Reviewing Queue

Purpose	Information Displayed	Menu Path
Use the Unearned Revenue Review Queue to track orders where the entire amount of the order is billed upon first shipment.	Incomplete single invoice orders.	From the **Orders > Queues** menu, select Unearned Revenue Review Queue.

Warehousing Queues

The following tables describe the warehousing queues in the Eclipse system.

Transfer Confirmation Queue

Purpose	Information Displayed	Menu Path
Use the Transfer Confirmation Queue to see what items are being requested for procurement and transfer between branches in a multi-branch network.	All branch procurements. This queue does not include return transfers.	From the **Xfers** menu, select **Transfer Confirmation Queue**.

Note: You commit items appearing on this queue from the **From: branch** to the **To: branch**, even if you have not yet generated the transfer.

Cycle Count Queue

Purpose	Information Displayed	Menu Path
Use the Cycle Count Queue to verify inventory counts for items that you need to check and correct.	• On-hand quantities of less than zero. • Items that were over-committed during the sales entry process.	From the **Physical** menu, select **Cycle Count Queue**.

Shipping Manifest Queue

Purpose	Information Displayed	Menu Path
Use this queue to view orders on a manifest and package types.	• List of the orders to be on a shipment (through company truck or commercial carrier) for delivery. • Order package types	From the **Whse Mgt** menu, select **Shipping Manifest Queue**.

Tote In Process Queue

Purpose	Information Displayed	Menu Path
Use this queue to: • Track items' picking or putting away statuses through radio frequency (RF) counts. • Catch any mistakes that may occur in picking or putting away processes.	Items' RF counts.	From the **Whse Mgt > Warehouse Queues** menu, select **Tote In Process Queue**.

Warehouse In Process Queue

Purpose	Information Displayed	Menu Path
Use this queue to: • Review tickets or receipts that have been processed before the actual items have been picked or put away. • Close orders that you know have been picked or received but are still in the queue for some other reason.	Detailed view of products not yet picked or put away, listed individually on separate lines.	From the **Whse Mgt > Warehouse Queues** menu, select **Warehouse In Process Queue**.

Warehouse In Process Status

Purpose	Information Displayed	Menu Path
Use this queue to: • Assign an employee picking or putting away duties for an order. • Monitor the progress of orders that are being picked or put away.	• Open sales orders. • Purchase orders (normal or returns). • Transfers (inbound and returns). • Locations • Summary view of order generations. The Warehouse In Process Status program is constantly updated. The changes may occur on the screen as you are viewing it. **Updating** appears in the lower right corner of the screen as the system updates information. **Note:** If no one indicates order types for your branch, then your screen is	From the **Whse Mgt > Warehouse Queues** menu, select **Warehouse In Process Status**.

Purchasing Queues

The following tables describe the purchasing queues in the Eclipse system.

Suggested P/O Queue

Purpose	Information Displayed	Menu Path
Use this queue to determine when and how much to buy based on the calculated suggestions.	Buy lines that have fallen below order point. Products can be displayed by: • Normal • Emergency • Overdue P/Os • Open P/Os • Select Queues	From the **Purch > Queues** menu, select **Suggested P/O Queue**.

Procurement Confirmation Queue

Purpose	Information Displayed	Menu Path
Use this queue to view non-stock items that you need to procure from a vendor in order to fill a customer order. You can edit the order and add it to a suggested P/O.	Purchase orders that need nonstock items that you need to procure.	From the **Purch > Queues** menu, select **Procurement Confirmation Queue**.

Return Goods Queue

Purpose	Information Displayed	Menu Path
Use this queue to handle items that have either been returned by a customer or received from a vendor as defective, as an overshipment, or not as ordered. The queue tracks returned goods until you add an item to a purchase order or dispose of it in some way.	• Returned items from customers. • Defective Items from vendors.	From the **Purch > Queues** menu, select **Return Goods Queue**.

Accounting Queues

The following tables describe the accounting queues in the Eclipse system.

A/R Collection Queue

Purpose	Information Displayed	Menu Path
Use this queue to: • Select and view a list of customers with past due balances. • View invoices and payments. • View customer notes. • Schedule followup actions. • Edit customer files. • Change customer credit status.	Customers with past due balances.	From the **A/R** menu, select **A/R Collection Queue**.

Invoice Preview Queue

Purpose	Information Displayed	Menu Path
Use this queue to review invoices or orders before printing them. After you resolve any questions or problems for the invoice, change the **Print Status** back to **P**.	Orders depending upon the status given to the invoice. The system removes the invoice from the queue after you have printed it and sent it to the customer.	From the **Orders > Queues** menu, select **Invoice Preview Queue**.

A/P Preview Queue

Purpose	Information Displayed	Menu Path
Use this queue to manage payment approval and timing of payables from A/P Entry. • You can manage the payment schedule of the listed payables. • To remove an invoice from a Preview Queue, you must print a check for that invoice.	• Open payable invoices. • A running total of all approved invoices.	From the **A/P** menu, select **A/P Preview Queue**.

General Queues

The following tables describe the frequently used general queues in the Eclipse system.

User Job Queue

Purpose	Information Displayed	Menu Path
Use this queue to view and edit trackers: • Assigned to you. • With you on the forwarding list.	Trackers assigned or forwarded to you.	From the **System** menu, select **User Job Queue Viewing**.

Incoming Fax Status Queue

Purpose	Information Displayed	Menu Path
Use this queue to manage faxes sent through VSI-FAX Gold.	Faxes received.	From the **System** > **Printers** menu, select **Incoming Fax Status Queue**.

Outgoing Fax Status Queue

Purpose	Information Displayed	Menu Path
Use this queue to schedule faxes to be sent.	Faxes scheduled to be sent	From the **System** > **Printers** menu, select **Outgoing Fax Status Queue**.

See Also:

Common Work Queues and Activity Logs by Job Function

Common Work Queues and Activity Logs by Job Function

Queues are electronic to-do lists that provide an efficient way to monitor the processes in your company in a timely fashion. Activity logs are permanent archives of comments, system-generated log entries, or trackers assigned to customers, vendors, users, products, EDI transactions, or system activities.

Following are the common work queues and activity logs in Eclipse, organized by job function.

Job Function	Common Queues
Sales	• Customer Calling Queue • Bid Follow Up Queue • Open Order Status Review Queue • Lot Order Status Review Queue • Open Work Order Queue • Product Serial Queue • Remote Order Entry Review Queue • Unearned Revenue Review Queue
Warehousing	• Transfer Confirmation Queue • Cycle Count Queue • Shipping Manifest Queue • Tote in Process Queue • Warehouse in Process Queue • Warehouse in Process Status • Product Activity Log
Purchasing	• Suggested P/O Queue • Procurement Confirmation Queue • Return Goods Queue • Vendor Activity Log & Entry
A/R	• A/R Collection Queue • Invoice Preview Queue • Unearned Revenue Review Queue • Customer Activity Log & Viewing
A/P	• A/P Preview Queue • Vendor Activity Log & Viewing
General Queues	• User Job Queue for Entry & Viewing • User Activity Log • Incoming Fax Status Queue • Outgoing Fax Status Queue

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