

# **Solar Eclipse Application Maintenance**

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Release 8.7.4

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## Application Maintenance Overview

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

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

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

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

## Setup Requirements for User Maintenance

Following are the control maintenance records and authorization keys for User Maintenance.

### Control Maintenance Records

Set the following control maintenance records:

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

### Authorization Keys

Assign the following authorization keys:

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

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



## Terminal Setup Overview

The system administrator needs to define defaults for all terminals, or computers, connected to the host system. These defaults define the interface between the terminal and the system. For example, you can define a port ID for a terminal. The port ID determines how the terminal connects to the host system and identifies the printers to use as its slave printers. The printers and terminal are connected to the same port. Terminal settings also affect printer defaults for a particular computer.

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

For more information, see [Setting up Terminals](#).

## Setting Up Terminals

Use Terminal Setup to define the defaults that terminals, or computers, use when running Eterm, the terminal emulator software. When users enter transactions from a terminal, the system uses the defaults for that terminal.

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

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

Use the following tasks to:

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

### To set up terminals:

1. From the **System > System Files** menu, select **Terminal Setup** to display the Terminal Setup window.
  2. Do one of the following to find the terminal ID you want to set up:
    - Right-click, select **Search**, and enter the terminal ID.
    - Click the **ID** column header to sort the terminals alphabetically.
  3. In the **ID** column, select on one of the following:
    - A terminal ID for which to set up defaults.
    - The blank line at the bottom of the window. Type an ID to identify a new terminal ID. The terminal ID is also the port ID. This ID identifies the port the terminal uses to connect to the host system.
- Note:** This field is case-sensitive.
4. In the **Price Branch** column, enter the default pricing branch that the system should assign to sales transactions entered from this terminal. If you do not enter a default pricing branch, the system prompts the user to specify a pricing branch during order entry.
  5. In the **Ship Branch** column, enter the default shipping branch that the system should assign to sales transactions entered from this terminal. If you do not enter a default shipping branch, the system uses the branch entered in the **Shipping Branch Override** control maintenance record. If that record is blank, the system uses the pricing branch.

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

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6. In the **Printer Location** column, select the printer location associated with this terminal ID.
  - If you set a location in the **Printer Location** column, it is the default printer location for the terminal when a user logs on to the terminal, accesses Sales Order Entry or Purchase Order Entry, or uses the change location function.

- If you leave the **Printer Location** column blank for a terminal, the system prompts the user at log in and when they access order entry to select a location.
  - If a physical branch is defined for the location using the **Physical Branch** column, when you search, the list displays the locations within the physical branch first. Press **F10** again to display a list of all locations you are authorized to use in User Maintenance.
7. If this is a modem or hand-held terminal, in the **Type** column, enter one of the following:
- **RF Term** - The port is for a hand-held radio frequency terminal used in a warehouse for picking and putting away a product.
  - **Modem** - The port is for a modem connection used for dialing into your system.
- Note:** A user must have **Remote Logon OK** set in User Maintenance to use this port to log on to the system.
8. Use the following columns to further define your terminal:

Column	Description
<b>ReLog</b>	<p>If this is a counter terminal, in the column indicate whether to allow employees to create orders at a counter terminal under someone else's login name.</p> <ul style="list-style-type: none"> <li>• <b>Yes</b> - Logs the user completely off the system each time they complete a sales order with a Pick Up Now status, selects <b>File &gt; Next Item</b>, or uses <b>Ctrl .</b> (period) to start a new order. The next user must enter a user name and a password to access the system. If an order is still open and displayed in the Sales Order Entry window, the system does not log the user off.</li> </ul> <p>In addition, if you set the <b>ReLog</b> column to <b>Yes</b>, the system requires the user to enter their user name and password to log in after the terminal is inactive for the time specified in the <b>Seconds Of Inactivity Before Requiring Relog</b> control maintenance record.</p> <ul style="list-style-type: none"> <li>• <b>No</b> -The system does not log users off each time they complete a sales order.</li> <li>• <b>Lock</b> - Locks the terminal after the user completes a sales order with a Pick Up Now status, selects <b>File &gt; Next Item</b>, or uses <b>Ctrl .</b> (period) to start a new order. The user is still logged in to the system, and all the windows that were open remain open. However, the user must enter their password to regain access to Solar. The advantage to setting this field to <b>Lock</b> is that the user can start working from where they left off when the terminal was locked.</li> </ul> <p>In addition, if you set the <b>ReLog</b> column to <b>Lock</b>, the system requires the user to enter their password to access the system after the terminal is inactive for the time specified in the <b>Seconds Of Inactivity Before Requiring Relog</b> control maintenance record.</p> <p>You can lock a terminal at anytime by selecting <b>Lock Solar</b> from the <b>File</b> menu.</p>
<b>Sales Source</b>	Select the primary sales department, such as counter sales, inside sales, or outside sales, that will use this terminal. If left blank, the system prompts the user to choose a sales source at order entry.
<b>Ship Via</b>	<p>Select the default method for transferring products ordered from this terminal to the customer. For example, a counter terminal may use Pickup as the default ship via.</p> <p><b>Important:</b> If a customer does not have a default ship via assigned in Customer Maintenance and you leave this field blank, the system prompts the order taker at this terminal to enter a ship via for the customer's order.</p>

Column	Description
Physical Branch	Enter the branch at which the terminal is physically located.
Local Storage Br	Enter the branch at which images are saved by default.

9. Save your changes and exit the window.

**To apply terminal defaults to a user:**

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

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

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

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

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

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

You can lock a terminal at anytime by selecting **Lock Solar** from the **File** menu.

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

1. From the **System > System Files** menu, select **Terminal Setup** to display the Terminal Setup window.
2. Do one of the following to find the terminal ID for which you want to set password requirements:
  - Right click, select **Search**, and enter the terminal ID.
  - Click the **ID** column header to sort the terminals alphabetically.
3. In the **ReLog** column for the terminal, indicate whether to allow employees to create orders at a counter terminal under someone else's login name.
  - **Yes** - Logs the user completely off the system each time they complete a sales order with a Pick Up Now status, selects **File > Next Item**, or uses **Ctrl .** (period) to start a new order. The next user must enter a user name and a password to access the system. If an order is still open and displayed in the Sales Order Entry window, the system does not log the user off.

In addition, if you set the **ReLog** column to **Yes**, the system requires the user to enter their user name and password to log in after the terminal is inactive for the time specified in the **Seconds Of Inactivity Before Requiring ReLog** control maintenance record.

- **No** -The system does not log users off each time they complete a sales order.
- **Lock** - Locks the terminal after the user completes a sales order with a Pick Up Now status, selects **File > Next Item**, or uses **Ctrl .** (period) to start a new order. The user is still logged in to the system, and all the windows that were open remain open. However, the user must enter their password to regain access to Solar. The advantage to setting this field to **Lock** is that the user can start working from where they left off when the terminal was locked.

In addition, if you set the **ReLog** column to **Lock**, the system requires the user to enter their password to access the system after the terminal is inactive for the time specified in the **Seconds Of Inactivity Before Requiring Relog** control maintenance record.

You can lock a terminal at anytime by selecting **Lock Solar** from the **File** menu.

4. Save your changes and exit the window.

**To manually lock a terminal:**

1. From the **File** menu, select **Lock Solar** to require a password for Eclipse or any open application.

The system displays the **This Solar Eclipse client has been locked** prompt, which indicates which user's password is required to access the application.

## User Maintenance Overview

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

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

The system administrator assigns an ID and creates a record in User Maintenance for each person who uses the system. Authorized users can edit their own records to set user defaults related to their individual job functions. Otherwise, the system administrator must set up each record to be unique to the user's job functions.

## User Record Creation Overview

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

### Prototyping

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

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

### Virtual Users

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



## Creating User Records

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

The final step in creating a user record is to assign the user a password.

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

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

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

Complete the following tasks to create a user record:

- Create a user record.
- Set the user password parameters.

### Creating a User Record

Enter the parameters that define a user to the system in the User Maintenance window.

#### To create a user record:

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

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

2. From the **File** menu, select **New** to display the **Enter New User ID** prompt, then type the new user ID and click **OK**.

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

3. Complete the fields in the **User Information** area of the window, as needed.

Field	Description
Full Name	The user's first and last name.

Field	Description
<b>Root Menu</b>	The menu name that determines the system programs to which the user should have access. MAIN includes all system menus and is appropriate for the highest-level administrative user. To limit the functions available to different user groups within your company, create custom menus.  <b>Note:</b> You must assign a main-level menu as a user's root menu. You cannot assign a submenu.
<b>Nickname</b>	The name by which the user prefers to be called. For example, if the user's legal first name is Robert, he may want to be called Bob.
<b>Title</b>	The user's job title, position, or job function. For example, Purchaser or Salesperson.
<b>Department</b>	The department in which the user works. Click the <b>List</b> button to display the valid departments and select one.
<b>Birthdate</b>	The date the user was born. If you enter a birth date, the Happy Birthday message tune plays on the user's birthday.
<b>Message Tune</b>	A short audio tune that plays when the user receives a system message. Click the <b>List</b> button and select a tune.
<b>Sort By</b>	How the system sorts the user's full name in lists, searches, and reports. The system populates this field. Enter new sort by criteria if needed.
<b>Commission Plan</b>	The plans used to determine how this user's commission is calculated, if applicable. If you assign multiple commission plans to this user, *Multi* displays in this field.
<b>Remote Customer</b>	If the user ID is for a customer whom you allow to dial into your system to view information about their account, enter that customer's name in this field. This limits the user's inquiries to data related only to this customer.
<b>Time Zone</b>	The time zone in which this user works. If you leave this field blank, the default time zone is that of the server to which the user connects. When scheduling events with users in different time zones, such as conference calls, the system converts event times to each user's designated time zone.  <b>Note:</b> You can assign some time zones with a generic indicator (MT) or an explicit indicator of Daylight Savings Time (MDT) or Standard Time (MST). Regardless of the option you select, the system displays times based on the actual state of Daylight Savings or Standard Time.
<b>Job Functions</b>	The job functions this user performs.
<b>Fax Access Code</b>	The code required for this user to access the fax system.

4. Select check boxes in the **Options** area to define special functions for the user record.

Option	Description
<b>Salesperson</b>	Identifies the user as a salesperson. The user can be designated as an inside or outside salesperson in Customer Maintenance or Sales Order Entry.

Option	Description
<b>Enable Break Key</b>	Enables user to abnormally end a session using the <b>Ctrl+Break</b> key combination. Only the system administrator should have this ability.
<b>No Logon</b>	Prevents the user from logging on. Use this option for virtual User IDs.
<b>No Messaging</b>	Blocks the user from receiving company messaging. Use this option for customers who place remote orders.
<b>Remote Logon OK</b>	Authorizes the user to log in using a modem.
<b>Picker</b>	Identifies the user as a picker.  <b>Note:</b> For a user to appear on a picker selection list, you must flag the user as a picker and provide access to the shipping branch associated with the transaction.
<b>No Planner</b>	Blocks the user from being listed on the Daily Planner or using the Scheduler window. Use this option for customer and virtual user IDs.
<b>Auto UET Message</b>	Determines whether the system should send a message to the user whenever a transaction the user enters generates an unquality event. Instead of using an asterisk, set the value as follows: <ul style="list-style-type: none"> <li>• <b>Blank</b> - Accepts the system default set in the <b>Auto UET Message Display</b> control maintenance record.</li> <li>• <b>Y</b> - Overrides the system default and has the system send a message.</li> <li>• <b>N</b> - Overrides the system default and has the system not send a message.</li> </ul>
<b>Bypass Eclipse Login</b>	Enables the user, when logging in, to bypass the Eclipse banner window. After the user logs in through the AIX Unix prompts, the application displays.
<b>Credit Manager</b>	Identifies the user as a credit manager. Any program that prompts for a credit manager will check this field in the user's record.
<b>No Job Queues</b>	Disables the user from being added to new trackers, tracker appends, or as the next or last user on a tracker. For example, if an employee leaves your company, set this flag to ensure they are not added to future trackers.

5. To set Work Order Entry default views, complete the following fields:

- **Work Order Recall** - The default Work Order Entry view for this user when recalling a work order.
- **Work Order New** - The default Work Order Entry view for this user during work order creation.

6. To set the remaining User Parameters, complete the following fields:

Field	Description
<b>Accounts</b>	The <b>eclipse</b> database account, which contains all the customer, vendor, product, and sales transaction information that this user can access. If your company has set up another account for training purposes, you can also assign that account to the user.

Field	Description
<b>Locations</b>	<p>The printer locations, or groups of printers, accessible to this user. For example, if a user works the showroom and counter on different days of the week, set up that user for both printer locations.</p> <p>Leave this field blank to authorize the user for all printers in all locations.</p> <p>Enter the locations in the order in which you want them to appear when the system displays a list of printer locations.</p> <p>When you log on, the printer location displayed at the bottom of your screen is the printer location assigned to your terminal. If no printer location is defined for the terminal, the system prompts you to select from the locations assigned to your user record. If no printer locations are assigned at the user level, the system prompts you to select from the locations assigned to the physical branch in which the terminal is located. Once a printer location is selected, you can also change it.</p>
<b>Sales Sources</b>	The sales sources from which this user can enter orders.

7. Assign the branches and territories for which the user is authorized to enter transactions.
8. Assign order entry views and templates to the user.
9. Assign authorization keys to the user.
10. Use the Maintenance menu items to enter additional user data, as needed.

To...	Select this menu option...
define authorized territories	<b>Maintenance &gt; Territories</b> Displays the Authorized Territories window.
assign gross profit control parameters	<b>Maintenance &gt; Gross Profit Control</b> Displays the GP% Control Parameters window.
create authorization passwords	<b>Maintenance &gt; Authorization Passwords</b> Displays the Authorization Passwords window.
define user defaults for Solar Eclipse	<b>Maintenance &gt; Solar Eclipse Options</b> Displays the Solar Eclipse User Maintenance window.

**Note:** The **Password** menu item is not active when creating a user record.

11. Use the **Additional** menu items to enter additional user data, as needed.

To...	Select this menu option...
assign time clock options	<b>Additional &gt; Time Clock</b> Displays the Time Clock Options window.
set user job queue and tracker defaults	<b>Additional &gt; Job Queue</b> Displays the User Job Queue/Tracker Settings window.
enter user scheduler parameters	<b>Additional &gt; Scheduler</b> Displays the Scheduler Parameters window.
enter additional user data	<b>Additional &gt; Miscellaneous Data</b> Displays the Additional User Data window.

To...	Select this menu option...
assign languages	<b>Additional &gt; Language</b> Displays the User Language window.
define Palm and imaging user parameters	<b>Additional &gt; Palm and Imaging Options</b> Displays the User Palm Maintenance window.

12. Save and exit the User Maintenance window.
13. Continue with the next task.

## Setting a User's Password Parameters

After creating a user record, the system prompts you to set the password parameters for the user.

### To set a user's password parameters:

1. When you exit the User Maintenance window after creating a new user record, the system displays the Password Maintenance window.
2. Complete the following fields to define the password requirements for this user. If you leave a field blank, that parameter has no restrictions.

Password Parameter	Description
<b>Minimum Password Length</b>	Minimum number of character for a password.
<b>Minimum Number of New Characters</b>	Minimum number of new characters you must include in a password. New characters are letters or symbols not appearing in the previous password.
<b>Minimum Number of Numeric Characters</b>	Minimum number of numbers that you must include in the password. This prevents the user from creating passwords solely using words.
<b>Minimum of Alphabetical Characters</b>	Minimum number of letters or symbols that you must include in the password. This prevents the user from entering passwords consisting solely of number sequences.

3. Complete the following fields to define the password change parameters for this user:

Password Parameter	Description
<b>Suggest Change Every (days)</b>	Number of days the system recognizes the password before it displays a message suggesting that the password is changed. The user can still log onto the system without changing the password.
<b>Require Change Every (days)</b>	Number of days the system recognizes the password before it requires that the password is changed. The user can no longer log onto the system without changing the password.

4. In the **Enter New Password** field, enter a password in lower case.  
**Note:** Do not use upper case characters for passwords.
5. In the **Verify Password** field, enter the password again.

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

## Using Prototyping to Create User Records

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

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

### To use prototyping to create user records:

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

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

2. Display the user record to use as a prototype.
3. From the **File** menu, select **New** to display the **Enter New User ID** prompt, then type the new user ID and click **OK**.

The system displays the following prompt: **Use [record ID] as a prototype?**

**Note:** The system also displays this prompt when you press **Esc** to exit the displayed record.

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

The system copies the authorization, account, and branch assignments from the previous user record. You can change these assignments, as needed.

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

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

6. Save the user record.

The system displays the Password Maintenance window.

7. Create a password for this user.

## Required User Record Information Overview

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

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

## Assigning Branches to Users

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

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

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

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

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

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

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

### To assign branches to a user:

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

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

4. In the **Home Branch** field, enter the branch where this user works.

The system lists the home branch in the **Branches** column. By default, the **Authorization** column is blank, which gives the user full access to this branch. You can edit this field, as described in Step 8.

5. To assign a home territory to the user, select the territory in the **Home Territory** field.

**Note:** If you need to limit a user's authorizations for one or more branches in a territory, do *not* assign a home territory. To grant full or limited authorizations to designated branches, list the branches in the lower section of the screen, as described in Steps 7 and 8.

6. To assign an inventory inquiry territory, enter the territory in the **Inventory Inquiry Terr** field.

If you...	Then, when this user does an inventory inquiry...
enter a territory	information for all the branches in that territory displays.



If you...	Then, when this user does an inventory inquiry...
leave the field blank	<p>the system determines what to display in the follow sequence:</p> <ul style="list-style-type: none"> <li>• If a home territory is assigned, information for the branches in that territory displays.</li> <li>• If a home branch is assigned, information for that branch displays.</li> <li>• If a home branch is not assigned, the user cannot do an inventory inquiry in any branch.</li> </ul>

7. In the **Branches** column, enter any branches to which you want to grant full or limited access.  
The system populates this column with the user's home branch. Enter additional branches, as needed.
8. In the **Authorized** column for each branch listed in the Branches column, do one of the following:
  - Leave the field **blank** to grant access based on the user's authorization key assignments.
  - Select one of the following options to limit the user's access to the branch:
    - **I-Only Inventory Inq** - The branch is accessible to this user only for inventory inquiry.
    - **S-Sales Orders/Inv Inq** - The user can ship material out of this branch through sales order entry, but cannot enter orders at this branch. The branch is accessible to this user for inventory inquiry.
9. Click **OK** to save this information and return to the User Maintenance window.

## Authorization Key Assignment Overview

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

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

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

- Available Keys – Lists the keys not assigned to the user.
- Assigned Keys – Lists the keys assigned to the user. You also need to assign authorization levels to some of the keys.

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

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

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

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

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

## Assigning Authorization Keys to Users

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

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

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

### To assign authorization keys to a user:

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

The **Available Keys** area lists defined templates and authorization keys. Templates have a prefix of **\*TP:** and are listed first.

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

4. To assign a key or template, select the item in the **Available Keys** area and click the **Assign >>** button.

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

**Note:** To move the cursor to a designated key, enter all or part of the key name in the **Find** field.

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

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

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

With the assigned key selected, from the **Edit** menu, select **Detail** to display the Detail selection window. To add items to this window, position the cursor on a blank line and select from the list. Click **OK** to save the information and return to the Authorization Key/Template Maintenance window.

Authorization Key	Use to permit access to...
GL.ACCOUNTS	view and edit designated G/L accounts.

<b>Authorization Key</b>	<b>Use to permit access to...</b>
INVALID.PRODUCT.LINES	sell all but a few product price lines.
INVALID.VEN.TYPES	all but a few designated types of vendor records.
MESSAGE.GROUP.TYPES	view and edit designated Message Groups.
POE.SCHEDULE	set the <b>Line Item &gt; Auto Scheduling</b> option on the POE Body tab to a default value.
SOE.CREDIT.REL.RANK	release orders for customers.
SOE.SCHEDULE	set the <b>Line Item &gt; Auto Scheduling</b> option on the SOE Body tab to a default value.
TOE.SCHEDULE	set the <b>Line Item &gt; Auto Scheduling</b> option on the TOE Body tab to a default value.
VALID.BLINES	edit product records in designated buy lines.
VALID.PLINES	edit product records in designated price lines.
VALID.PRODUCT.LINES	sell only a few product price lines.
VALID.VEN.TYPES	designated types of vendor records.
WIN.DIRECT.CREATE.DIR	export a report from the system using the Windows Direct Options program.

- To remove a key or template, select the item in the **Assigned Keys** area and click the << **Remove** button.

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

- Click **OK** to return to the User Maintenance window.

## Assigning Superuser Authorization

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

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

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

### To assign superuser authorization:

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

The key moves from the **Available Keys** area to the **Assigned Keys** area. The system assigns the highest level of authorization for almost all authorization keys.

5. The following authorization keys limit a user's access and require that you specify additional information when you assign them, using the **Detail** option on the Maintenance menu.

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

Authorization Key	When this key is not assigned...
AP.SIGNATURE.PRINT	the user cannot print an imaged signature on checks.
GL.ACCOUNTS	the user can access all G/L accounts.
INVALID.PRODUCT.LINES	no product lines are invalid.
INVALID.VEN.TYPES	no vendor types are invalid.
MESSAGE.GROUP.TYPES	the user can access all message group types.
POE.SCHEDULE	the system does not set the <b>Line Item &gt; Auto Scheduling</b> option on the POE Body tab to a default value.
SOE.CREDIT.REL.RANK	the user can release orders for any customer, based on the user's level assignment in the SOE.CREDIT.RELEASE authorization key.

Authorization Key	When this key is not assigned...
SOE.SCHEDULE	the system does not set the <b>Line Item &gt; Auto Scheduling</b> option on the SOE Body tab to a default value.
TOE.SCHEDULE	the system does not set the <b>Line Item &gt; Auto Scheduling</b> option on the TOE Body tab to a default value.
VALID.BLINES	all buy lines are valid.
VALID.PLINES	all price lines are valid.
VALID.PRODUCT.LINES	all product lines are valid.
VALID.VEN.TYPES	all vendor types are valid.
WIN.DIRECT.CREATE.DIR	the user cannot export a report from the system using the Windows Direct Options program.

6. **Click OK** to return to the User Maintenance window.

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

## Creating Authorization Key Templates

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

### To create an authorization key template:

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

The **Available Keys** area lists defined templates and authorization keys. Templates are at the top of the list and have a prefix of \*TP.

4. Move the cursor to a line that does not begin with an asterisk (\*) and use the **Template** option to display the Authorization Key/Template Maintenance window.
5. In the **Template** field, type the word **new** and press **Enter**, and then enter the new template ID to display the list of available authorization keys.

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

6. To assign an authorization key to the template, select it in the **Available Keys** area and click the **Assign >>** button.

The key name moves from the **Available Keys** area to the **Assigned Keys** area. If authorization levels are associated with the key, the system assigns the lowest level to the user, but you can change it.

7. To remove an authorization key, select it in the **Assigned Keys** area and click the **Remove >>** button.

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

8. Press **Esc** to save the template and return to the Authorization Key/Template Maintenance window for the User ID.

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

## Copying Authorization Key Templates

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

### To copy an authorization key template:

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

The **Available Keys** area lists defined templates and authorization keys. Templates are at the top of the list and have a prefix of \*TP.

4. Position the cursor on the template to copy and use the **Edit > Copy** menu option.

**Note:** You can also display the selected template and then use the **Edit > Copy** menu option.

5. At the **Enter new template ID** prompt, enter a new name for the copied template.

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

6. Select the new template name and use the **Edit > Template** menu option to display the template in the Authorization Key/Template Maintenance window. Authorization keys assigned to the template display in the **Assigned Keys** area.

7. Edit the template as follows:

- To assign an authorization key to the template, select it in the **Available Keys** area and click the **Assign >>** button.

The key name moves from the **Available Keys** area to the **Assigned Keys** area. If authorization levels are associated with the key, the system assigns the lowest level to the user, but you can change it, if needed.

- To remove an authorization key, select it in the **Assigned Keys** area and click the **Remove >>** button.

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

8. Save the template and return to the Authorization Key/Template Maintenance window for the user ID.



## Editing Authorization Key Templates

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

The following authorization key templates might be available:

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

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

### To edit authorization key templates:

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

The **Available Keys** area lists defined templates and authorization keys. Templates are at the top of the list and have a prefix of \*TP.

4. Position the cursor on the template to edit and use the **Edit > Template** option to display the Authorization Key/Template Maintenance window. Authorization keys assigned to the template display in the **Assigned Keys** area.
5. To assign an authorization key to the template, select it in the **Available Keys** area and click the **Assign** button.

The key name moves from the **Available Keys** area to the **Assigned Keys** area. If authorization levels are associated with the key, the system assigns the lowest level to the user, but you can change it, if needed.

6. To remove an authorization key, select it in the **Assigned Keys** area and click the **Remove** button.

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

7. Save the template and return to the Authorization Key/Template Maintenance window for the user ID.

## Deleting Authorization Key Templates

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

### To delete an authorization key template:

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

The **Available Keys** area lists defined templates and authorization keys. Templates are at the top of the list and have a prefix of \*TP.

4. Position the cursor on the template to delete and use the **Edit > Template** option to display the Authorization Key/Template Maintenance window. Authorization keys assigned to the template display in the **Assigned Keys** area.
5. Select the **File > Delete** option. The system prompts you to confirm the deletion.

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

## Additional User Record Information Overview

Once you have defined the general user defaults on the User Maintenance window, use the window's menu options to define defaults for special functions.

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

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

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

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

## Assigning Gross Profit Percent Control Parameters to Users

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

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

### Minimum Gross Profit Percentage

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

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

- Order
- Product
- Price Line
- User

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

### Maximum Discount from Standard Price

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

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

### To assign GP% control parameters to users:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the Maintenance menu, select **Gross Profit Control** to display the GP% Control Parameters window.
4. For stock and direct items, in the **Minimum GP % Required** field, enter the minimum gross profit percentage that this user can specify on an order.

5. For stock and direct items, in the **Maximum Discount from Standard Price** field, enter the maximum percentage discount on the standard price that this user can specify on an order.
6. Click **OK** to save this information and return to the User Maintenance window.
7. Save the user record.

## Assigning Languages to Users

Use the User Language window to designate the languages in which this user can work.

The user's default language is the first language in the list. If left blank, the default language is English.

### To assign languages to a user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the Additional menu, select **Language** to display the User Language window.
4. Do the following, as needed:
  - To add a language, position the cursor on a blank line and select a language.
  - To delete a language, position the cursor on the language and press **Alt-Delete**.
5. Click **OK** to save this information and return to the User Maintenance window.
6. Save the updated user record.

## Assigning Maintenance Users to User IDs

When you have a user ID that represents a group, you need to designate other users to monitor the user job queue for this ID and respond to the trackers in the queue. For example, you might have a user ID called INFOREQ, to whom people in your company can submit trackers requesting information.

Use the Maintenance User Selection screen to identify the additional users authorized to maintain a user record that represents a group, and respond to and close trackers that require final action by this user ID.

### To assign maintenance users to a user ID:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the **Additional** menu, select **Job Queue** to display the User Job Queue/Tracker Settings window.
4. Select the **Limit Access to Maintenance Users** option to allow only the maintenance users defined for this ID to perform the following tasks:
  - Add or delete this ID from the forwarding list.
  - View the User Job Queue for this user ID.
  - Change the followup status on that queue.
5. From the **Edit** menu, select **Job Queue Maintenance Users** to display the Maintenance User Selection window.
6. For each maintenance user, do the following:
  - In the **User Name** column, enter the maintenance user's ID.
  - In the **Append Name** column, select how the system describes the appends the maintenance user makes to trackers in the job queue.
    - **Group ID** - Displays the group user ID.
    - **User ID** - Displays the maintenance user ID. This is the default.
    - **Group & User ID** - Displays the group user ID followed by the maintenance user ID in parentheses.
7. Save the information and exit the window.
8. Continue exiting windows until you have saved the updated user record.

## Creating Authorization Passwords for Users

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

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

Two ways to respond to this prompt are:

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

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

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

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

### To create authorization passwords for users:

1. Do one of the following to display the Authorization Passwords window:
  - From the **System > System Files > User Control** menu, select **Authorization Password Maintenance**.
  - From the User Maintenance window, select **Maintenance > Authorization Passwords**.
2. In the **Login Password** field, enter the user's system password to access the password definition area of the window.
3. In the **Password** field, enter a password. The system populates the remaining columns as follows:

If your authorization level is...	Then the password is set for...
0	one-time use. You cannot change this setting. The system deletes the password from the list after the first use.



If your authorization level is...	Then the password is set for...
<b>1-998</b>	multiple use for the number of days equal to the level number. If you change the date, it cannot be later than the system-generated date or earlier than the current date. The system deletes the password from the list following the expiration date.
<b>999</b>	multiple use with no expiration date. The password is available for use until you remove it from the list.

4. To allow the password to be used just once, select the **One Time** option.
5. To allow the password to be used multiple times for a limited period, enter an expiration date in the **Expire Date** field.

**Note:** This field does not apply if the password is set up for one-time use.

6. Repeat steps 3 through 5 to set up additional authorization passwords.
7. Click **OK** to save this information and return to the User Maintenance window.
8. Save the updated user record.

## Defining Authorized Territories for Users

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

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

Use the Authorized Territories window to view users' default territory lists and to override the defaults, if necessary.

### To define authorized territories for users:

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

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

4. At the top of the window, select a territory type to determine a user's authorization:
  - **Reporting** - Territories for which the user can run reports. The default list of reporting territories displayed for a user includes every territory in which the user has an accessible branch. Any territory can be included in the reporting list. When running a report for a territory, only information for branches to which the user has access within the territory is included in the report.

We recommend that you do not change the default list of reporting territories. Let the Rebuild Authorized Territory Lists utility maintain this list.

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

The system displays the territories included in the selected type.

**Note:** The following steps apply to the type you selected in this step. You can work with only one territory type at a time.

5. To prevent the system from updating the list of territories defined for the selected territory type when the Rebuild Authorized Territory Lists utility runs, select the **Override Automatic Build** option.
6. To authorize the user for all territories for the selected territory type, select the **Authorized for All Territories** option.

For the **Viewable** territory type:

- Selecting this option authorizes the user to view all territory information on any window.
- Not selecting this option prevents the user from viewing any territory information on any window. This also removes all territories from the user's list.

For the **Editable** territory type:

- Selecting this option authorizes the user to edit all territory information on any window.
- Not selecting this option prevents the user from editing any territory information on any window. This also removes all territories from the user's list.

7. Repeat steps 4 through 6 for each territory type.
8. Click **OK** to save this information and return to the User Maintenance window.
9. Save the user record.

## Defining Palm and Imaging User Parameters

Use the User Palm Maintenance window to define the following:

- Parameters for downloading price line and buy line information to user Palm devices.

The system filters the buy lines and price lines users can download to their Palm devices for placing orders using Pocket OE. The **Valid Palm Buy Line Product Download** and **Valid Palm Price Line Product Download** control maintenance records define system-level defaults. You can override the system-level defaults by defining user-specific product download parameters.

The system only downloads products assigned to the buy lines and price lines defined for a user. If no price or buy lines are defined at the user level, the system downloads products assigned to the buy lines and price lines defined in the control maintenance records.
- Default document imaging profiles for users.

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

### To define Palm user parameters:

- From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
- In the **User ID** field, enter a user's ID to display the corresponding record.
- From the **Additional** menu, select **Palm and Imaging Options** to display the User Palm Maintenance window.
- In the **Product Price Lines to Download** field, select the price lines this user can download to their Palm device.
- In the **Product Buy Lines to Download** field, select the buy lines this user can download to their Palm device.
- In the **Product Availability Branch** field, select the branches or territory for which to download product availability for this user.

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

When the user requests a wireless price update, the palm device displays the availability at each branch and a total cumulative tally.

- Click **OK** to save this information and return to the User Maintenance window.
- Save the user record.

### To define imaging parameters for a user:

- From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.

2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the **Additional** menu, select **Palm and Imaging Options** to display the User Palm Maintenance window.
4. In the **Default Imaging profile** field, enter the default document imaging profile for this user.
5. Click **OK** to save this information and return to the User Maintenance window.
6. Save the user record.

## Defining User Defaults for Solar Eclipse

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

Each user is allowed one Solar Eclipse license per machine up until you reach your license count.

### To define user defaults for Solar Eclipse:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the Maintenance menu, select **Solar Eclipse Options** to display the Solar Eclipse User Maintenance window.
4. In the **Solar Main Menu** field, select the default main menu to display for this user. If you leave this field blank, the system displays the user's root menu defined for the character-based system.
5. In the **Custom Toolbar Template** field, select the user's default template for the user-defined toolbar.
6. In the **Messages** field, select the tune to play in Solar Eclipse when the user receives a message.
7. In the **Job Queues** field, select the tune to play in Solar Eclipse when the user receives a tracker in their job queue.
8. In the **Reports** field, select the tune to play in Solar Eclipse when the user receives a report that the Hold file forwarded.
9. Click **OK** to save this information and return to the User Maintenance window.
10. Save the user record.

## Entering Additional User Data

Use the Additional User Data window to add any of the following miscellaneous information to a user record:

- EIS Groups
- User Expense Parameters
- Outgoing E-mail Parameters
- User Entity Data
- Messaging Options
- User Warehouse Options
- Default Message for Faxed Orders

## Assigning EIS Groups to Users

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

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

### To assign EIS groups to users:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the **Additional** menu, select **Additional User Data** to display the Additional User Data window.
4. In the EIS Groups area of the screen, in the **EIS Groups** field, select the groups to assign to this user.
5. Click **OK** to save this information and return to the User Maintenance window.
6. Save the user record.

## Entering User Expense Parameters

If your company reimburses a user for expenses, designate the payee name for expense checks for this user and the IDs of users authorized to sign off on the expense. The payee must be set up as a vendor record.

### To enter user expense parameters:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.

3. From the **Additional** menu, select **Additional User Data** to display the Additional User Data window.
4. Complete the following fields in the User Expense Parameters area of the screen:
  - In the **Pay To** field, enter the name of the vendor to display on expense checks for this user.
  - In the **Signoff** fields, enter up to four IDs of users who must authorize this user's expenses before the system can create an expense check for the user.
5. Click **OK** to save this information and return to the User Maintenance window.
6. Save the user record.

## Setting User Outgoing E-mail Parameters

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

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

### To set user outgoing e-mail parameters:

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

Use this feature if this user is frequently logged out of Eclipse but still needs to receive information for the trackers for which they are on the forward list, as well as system message communications.
5. Click **OK** to save this information and return to the User Maintenance window.



6. Save the user record.

## Entering User Entity Data

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

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

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

### To enter user entity data:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the **Additional** menu, select **Additional User Data** to display the Additional User Data window.
4. Complete the following fields in the User Entity Data area of the window as needed:
  - In the **Customer** field, enter the name of the customer with which this user is associated.
  - In the **Vendor** field, enter the name of the vendor with which this user is associated.
  - In the **Contact** field, enter the name of the contact with which this user is associated.
5. Click **OK** to save this information and return to the User Maintenance window.
6. Save the user record.

## Defining User Messaging Options

Use the Messaging Options area of this window to specify user defaults related to the Message System. For example, you can specify the screen that displays when you press **Ctrl-F8** and the maximum number of messages to store for the user.

You can also assign users to and remove them from message groups.

### To define user messaging options:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.

3. From the **Additional** menu, select **Additional User Data** to display the Additional User Data window.
4. Complete the following fields in the Messaging Options area of the window, as needed:
  - In the **Message Groups** field, click the **Multiple Item** button to display the Message Groups window, which lists the message groups to which this user is assigned. Add and delete message groups, as needed, and then click **OK** to save this information and return to the Additional User Data window.

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

- In the **Message Default** field, select whether **Ctrl-F8** displays the Received Messages screen or the Message Dialog screen.
    - **R-Review** - Displays the Received Messages screen.
    - **D-Dialog** - Displays the Message Dialog screen. This is the default value.
  - In the **Maximum Number of Messages** field, enter the maximum number of messages to keep in the message system for this user. When the number of messages reaches the maximum, the system deletes the oldest messages as new messages arrive.
  - In the **New Message Notification** field, select how the system notifies this user each time the user receives a new message:
    - **Scrolling Notification** - The newest received message scrolls across the bottom of the screen until the user accesses the Message System and views the received messages. This is the default method.
    - **Single Notification** - The following notification message displays at the bottom of the screen: x New Message Waiting, where x indicates the number of received messages the user has not yet viewed. This message displays until the user accesses the Message System and views the received messages.
    - **No Notification** - The system never displays any message notification at the bottom of the screen.
5. Click **OK** to save this information and return to the User Maintenance window.
  6. Save the user record.

## Entering User Warehouse Options

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

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

### To enter user warehouse options:

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

2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the **Additional** menu, select **Additional User Data** to display the Additional User Data window.
4. Complete the following fields in the User Warehouse Options area of the window as needed:
  - In the **Pick Group Default** field, do one of the following:
    - Enter the default pick group to display for this user when the user logs into RF Picking.
    - Enter **ALL** to display all pick groups when the user logs into RF Picking.
  - In the **Location Maint View** field, select the user's default view for the Product Location Maintenance window.
  - In the **Display Warning if Receiving in Incorrect Branch** field, select whether the system displays a warning when a user displays a purchase order or stock receipt whose receiving branch does not match the branch from which the user is working.
  - **Never** - Does not display a warning.
  - **Both** - Displays a warning from purchase order entry and stock receipts.
  - **POE** - Displays a warning from purchase order entry.
  - **Stock Receipts** - Displays a warning from stock receipts.

**Note:** The setting in this field does not restrict the user from editing or receiving the purchase order, regardless of what the receive branch of the purchase order may be.
5. Click **OK** to save this information and return to the User Maintenance window.
6. Save the user record.

## Defining a Default Message for Faxed Orders

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

### To define a default message for faxed orders:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the **Additional** menu, select **Additional User Data** to display the Additional User Data window.
4. In the **Fax Default Message for Order Entry** field, enter the message that the system displays on the cover sheet of all faxed orders this user creates.
5. Click **OK** to save this information and return to the User Maintenance window.
6. Save the user record.

## Entering User Scheduler Parameters

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

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

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

### To enter user scheduler parameters:

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

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

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

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

Select from the following choices:

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

If this field is set to...	And the Check Scheduler on Login control maintenance record is set to...	Then the system...
	Daily Scheduler	always displays the Daily Schedule window. To exit the window, the user must schedule at least one event.
<b>Never</b>	No Check	never prompts the user.
	Daily Planner	never prompts the user.
	Daily Scheduler	never prompts the user.

6. In the **Prompt for Schedule on Logout** field, select one of the following options to indicate whether the system should prompt this user to enter the day's schedule in the Daily Planner when they log out.

- **Empty** - Prompts the user to enter the day's schedule if the Daily Planner for that day is empty.
- **Always** - Always prompts the user to enter the day's schedule.
- **Never** - Never prompts the user to create an entry in the Daily Planner. This is the default value.

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

7. In the **Default Schedule Alarm Time** field, enter the default amount of time in minutes, hours, or days that the scheduler alerts the user before scheduled events.
8. In the **Prompt for Closing Notes** field, indicate whether you want the system to display the Closing Notes prompt whenever this user marks an event as completed.

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

9. To treat this user as a scheduler location, such a conference room, select the **Location User** option.

If you select this option, the system displays this user in the selection list for the **Location** field on the Schedule Detail Maintenance window.

10. In the **Allow Outlook to Control Schedule** field, enter **Yes** if you are using Eclipse Outlook Integration and want your schedule in Eclipse to contain the appointments that are in your Microsoft Outlook calendar.
11. Click **OK** to save this information and return to the User Maintenance window.
12. Save the user record.

## Setting User Job Queue and Tracker Defaults

Use the User Job Queue/Tracker Settings screen to:

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

### To set user job queue and tracker defaults:

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

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

5. In the **Display Options** field, select one of the following default views for this user's User Job Queue Viewing screen:
  - Original Comment

- Release Notes
  - Keywords
  - Problem Solution
6. In the **Append View Options** field, select the type of appends this user can view. If you leave this field blank, the user can view all appends.
  7. In the **Valid Sources** field, enter a list of sources this user can enter in the **Source** field on the Call Tracking System screen, indicating where the tracker originated.
  8. To create a list of user-defined job queue statuses for this user ID, in the **Valid Statuses** field, click the **Multiple Item** button to display the User Job Queue Statuses window. Then enter the statuses. Do either of the following:
    - To add a status to the list, position the cursor on a blank line and type the status.
    - To remove a status from the list, position the cursor on the status to remove and press **Alt-Delete**

The user can use the statuses listed here in addition to the Valid User Job Queue Statuses defined in Control Maintenance.

**Note:** The User Job Queue Viewing window sorts the trackers in your queue by status and displays them in the same order in which the statuses are entered on this screen.

9. In the **Send Tracker Message on Update/Addition by Owner** field, select one of the following options to determine when the system sends a message to users on the forward list if the tracker owner updates the tracker:
  - **Never** - Never send a message.
  - **New** - Send a message only when the tracker owner appends a new comment.
  - **All** - Send a message whenever the tracker owner updates a previous comment or appends a new comment.
10. If the displayed user is set up as a queue, select the **Limit Access to Maintenance Users** option to allow only the maintenance users defined for this ID to perform the following tasks:
  - Add or delete this ID from the forwarding list.
  - View the User Job Queue for this user ID.
  - Change the followup status on that queue.
11. To assign maintenance users, from the **Edit** menu, select the **Job Queue Maintenance Users** option.
12. Click **OK** to save this information and return to the User Maintenance window.
13. Save the user record.

## Custom Menus Overview

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

**Note:** If an application, such as Customer Maintenance, requires authorization to access, and the user does not have the required authorization assigned in User Maintenance, the menus display without the application.

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

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

Use this process to create variations of the MAIN menu for different user groups within your company. Then, in User Maintenance, assign each user the root menu that corresponds to the user's job function. Use custom menus to determine which programs users can access, simplify navigation for users, and create unique menus for users with special functions. You can also add custom menus for custom programming on your site, as well as report writer and G/L reports that you have defined for your business to a menu.

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**Important:** You cannot modify the standard menus shipped with the Eclipse system. Upgrades to future software releases override the standard menu set. You need to create copies of the standard menus to make changes to the contents of the menus.

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## Searching Source Menus

As you are creating your custom menus, you can filter the available menus to select from in Menu Maintenance, as well as search by keyword to find the menu or window you want to add to your custom menu.

### To search for a source menu:

1. From the **System > System Files > User Control** menu, select **Menu Maintenance** to display the Menu Maintenance window.
2. In the **Menu** field on the right side of the window, select the menu ID you want to edit, or click **New** to create a new menu.
3. On the left side of the window, select the **Select from top-level menus only** check box to search for only menus that call other menus.

For example, the ORDERS menu calls the CONSIGNMENT menu and the INQUIRIES menu, along with many others. To filter using all menus, deselect this check box.

4. In the **Source Menu** field, select the menu you want to display. To display the standard Eclipse main menu, select **MAIN**.

The list also includes any custom menus you have created and saved.

### To search for a menu or item within a source menu:

1. From the **System > System Files > User Control** menu, select **Menu Maintenance** to display the Menu Maintenance window.
2. Search for a source menu as described above.
3. In the **Search** field, type all or a portion of a word in the menu or the window you want to find.

The system highlights the first occurrence of the keyword in the **Main Menu** list. Click the **Next** button to highlight the next occurrence of the word, and use the **Previous** button to search the list in ascending order.

## Creating Custom Menus Using Standard Eclipse Menus

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

You can create custom menus by copying subsets of the standard menus that come with Eclipse, or you can modify an existing menu and build your menu from scratch.

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

**Note:** Any menu you create using Menu Maintenance is available in Eterm and Solar if the menu is setup to work in both interfaces. However, for a menu option to work in Eterm, it must have an Eterm program name, and for it to work in Solar, it must have a Java Program and Class.

### To create a custom menu with standard Eclipse Menus:

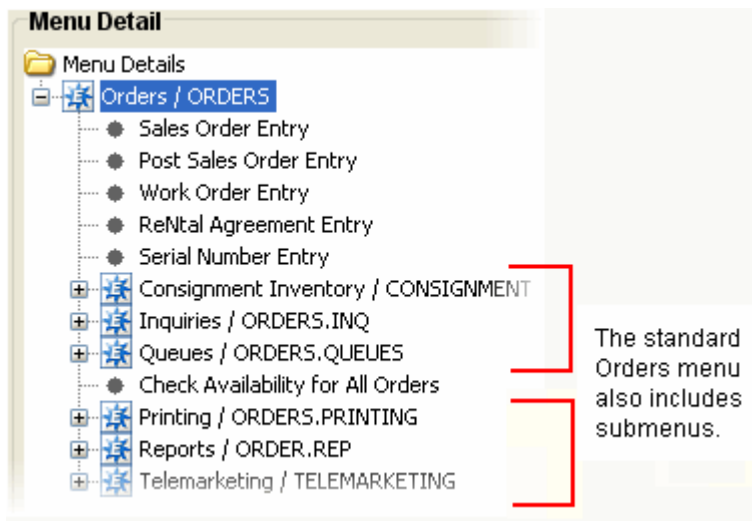
1. From the **System > System Files > User Control** menu, select **Menu Maintenance** to display the Menu Maintenance window.
2. On the right side of the window, click **New** to create a new menu, enter an ID for the menu at the prompt, and click **OK**.

Name the menu so you can identify it later when assigning it to your users or adding it to other menus. For example, if you are creating a menu for your counter personnel, you might name the menu CTR.MAIN.

To modify an existing custom menu, select the menu ID in the **Menu** field to display the details of the existing menu.

3. In the **Main Menus** list, select the menu or window you want to add to your menu and either drag and drop it to the **Menu Detail** for your custom menu, or click **Add**.

If you selected a menu, the entire contents of the menu is added to your custom menu. This includes all the submenus under a menu as well as the titles and shortcut keys for each menu option. To view the menu names as they display in the Eterm interface, select **View > View Eterm Titles**.



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**Important:** You cannot modify a main menu or the windows available under a main menu, because you lose your changes each time your system is upgraded. For information about using a main menu as a starting point and then modifying its contents, see [Editing Standard Menu Contents Within Custom Menus](#).

You can rename individual window options if you added them separately and they are not a part of main menu.

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4. Continue adding menus or windows, and add additional menu options, as necessary, including Report Writer reports, mass loads, G/L reports, or custom programming.
5. From the **File** menu, select **Save** to save your custom menu.

The custom menu is now available for selection in the **Main Menus** list to search for only menus that call other menus.

## Editing Standard Menu Contents Within Custom Menus

As you are creating your custom menus, you might find that you want only a portion of a standard Eclipse menu, or that you want to rename a menu option or assign a different shortcut key. To protect your custom menus, you cannot edit a standard menu, because you lose your changes the next time your software is upgraded. However, you can create a copy of a standard menu and modify it to meet your needs.

As you work with your custom menus, you can identify which menus are standard and which menus are copies that you can modify by the icons that display next to each menu in the menu details.

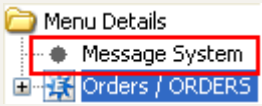
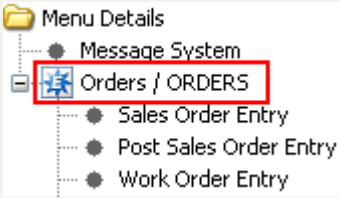
-  - Indicates a standard Eclipse menu that you cannot change.
-  - Indicates a copy of a standard menu that you can add to or remove content from, rename, or change the shortcut keys.

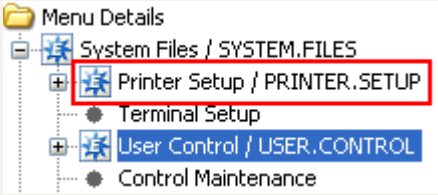


Any menu you create using Menu Maintenance is available in Eterm and in Solar.

### To edit a standard menu within a custom menu:

1. From the **System > System Files > User Control** menu, select **Menu Maintenance** to display the Menu Maintenance window.
2. On the right side of the window, select the menu ID you want to edit in the **Menu** field, or click **New** to create a new menu.
3. Do any of the following to modify the contents of your custom menu.

The title and shortcut keys that display in the **Title** and **Shortcut Key** fields display for either Eterm or Solar, depending on whether the View > View Eterm Titles menu option is selected. To see both Eterm and Solar's titles and shortcut keys for a selected menu, click the **Advanced** button.

To...	Do this...
change the title or shortcut to a window that <i>is not</i> contained in a standard menu 	select the window in your custom menu details, and update the information in the <b>Title</b> or <b>Shortcut Key</b> fields.
change the title or shortcut to a main menu in the main menu bar 	select the menu in your custom menu details and update the title or shortcut key in the <b>Title</b> or <b>Shortcut Key</b> fields.  You can only change the title of a main menu. If a main menu contains other submenus, you cannot rename the submenus within the main menu without first copying the main menu.

To...	Do this...
<p>change the title or shortcut to a main menu or a window within a main menu in your custom menu</p> 	<p>select the menu or window in your custom menu details and update the title or key in the <b>Title</b> or <b>Shortcut Key</b> field.</p> <p>The system displays a warning message indicating that you cannot change the contents of a main menu. Click <b>OK</b>, to rename the menu, which creates your own version of the menu, and update the title or shortcut key.</p> <p>Your versions of menus are indicated with a folder  icon.</p>
<p>remove a submenu or a window from a main menu</p>	<p>select the menu or window in your custom menu details you want to remove and click <b>Remove</b>.</p> <p>The system displays a warning message indicating that you cannot change the contents of a main menu. Click <b>OK</b>, to rename the menu. You can remove any submenu or window from your version of the menu.</p> <p>Your versions of menus are indicated with a folder  icon.</p>

- From the **File** menu, select **Save** to save your custom menu. That menu is now available for selection to add to other custom menus in the **Main Menus** list.

## Adding Non-Standard Menu Options to Custom Menus

As you create custom menus, you can add G/L reports, Report Writer reports, mass loads, user-defined screens, and custom subroutines to any menu. Using Menu Maintenance, the system validates the additional menu options you are adding against the reports, mass loads, and user-defined screens available.

### To add a non-standard menu option to a custom menu:

1. From the **System > System Files > User Control** menu, select **Menu Maintenance** to display the Menu Maintenance window.
2. On the right side of the menu, select the menu ID you want to edit in the **Menu** field, or click **New** to create a new menu.
3. Select the menu or window above which you want to add the non-standard menu option.

You can also insert the menu anywhere and use the **Move Up** and **Move Down** buttons to place the menu option in the correct place.

4. Select **Additional** and then select the type of option you want to add for each option, complete the menu information in the dialog box that displays, and click **OK** to add the option to your custom menu.

For each menu item, enter a title in the **Title** field that identifies the menu option in and a shortcut key used with the **Alt** key to access the menu using the keyboard in the **Shortcut Key** field. The **Shortcut Key** field displays only the keys available within the menu to which you are adding the option.

Menu Option	Description
<b>G/L Report</b>	Adds a menu option for any general ledger report available to you that was created using the G/L Report Generator. General ledger reports start with <b>GL-</b> . For example, <b>GL-EXPENSE</b> . The list in the <b>GL Report Name</b> field provides all the general ledger reports available to you.
<b>Report Writer</b>	Adds a menu option for any report you have created using the Report Writer. Report writer reports start with <b>LREP-</b> . For example, <b>LREP-ABC.CODES</b> . The list in the <b>Report Writer Name</b> field provides all the report writer reports available to you.
<b>User-Defined Screen</b>	Adds a menu option for any user-defined screen in your system. User-defined screens start with <b>FORM-</b> . For example, <b>FORM-USERZ.SCREEN</b> .
<b>Mass Load</b>	Adds a menu option for any load program you have created using Mass Load. Mass loads start with <b>LREP-</b> . For example, <b>LREP-ABC.CODES</b> .
<b>Advanced Menu</b>	Adds a menu option for any subroutine you want to add to your menu. For example, if you have a custom programming on your site, you can add the subroutine that calls the custom program to your menu. The system searches all available menus.

5. From the **File** menu, select **Save** to save your custom menu.

## Creating User-Specific Custom Menus

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

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

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

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

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

For example, you can have two user-specific menus named **&JDOE01&** and **&JDOE02&**.

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

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

## Viewing and Updating Advanced Menu Properties

Each menu item you add contains properties that the system finds and attaches for you. You can view and update these properties, as needed. You can also use these properties to create a menu option from scratch, without pulling it from a source menu, or when you are adding a custom program or subroutine to a menu.

### To view and update advanced menu properties:

1. From the **System > System Files > User Control** menu, select **Menu Maintenance** to display the Menu Maintenance window.
2. On the right side of the window, select the menu ID you want to edit in the **Menu** field, or click **New** to create a new menu.
3. In your custom menu details, select the item you want to view or update and click **Advanced**. The Advanced window displays the following information for the menu:

Field	Description
<b>Eterm Title</b>	The menu title, as it displays in Eterm interface.
<b>Eterm Shortcut Key</b>	The menu's shortcut key ( <b>Alt</b> + this key) used in the Eterm interface.
<b>Solar Title</b>	The menu title, as it displays in the Solar interface.
<b>Solar Shortcut Key</b>	The menu's shortcut key ( <b>Alt</b> + this key) used in the Solar interface.
<b>Eterm Program Name</b>	The program name, such as AP.PREVIEW.QUEUE to call the program in Eterm. For a menu option to be available in Eterm, it must have an Eterm program name.
<b>Eterm Passer</b>	The value to pass to the program that identifies which window to display for this menu option.  For example, the same program runs report writer and mass load. Menu selections that display the report writer version of the Report Writer/Mass Load Design window use the passer value <b>R</b> . Menu selections that display the mass load version of the Report Writer/Mass Load Design window use the passer value <b>M</b> .
<b>Java Package and Java Class</b>	For Solar menus, the Java program to display from the menu. Together, the Java Package and the Java Class create the program name.  <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="border-bottom: 1px solid black; padding-bottom: 2px;">Java Package</div> <div style="border-bottom: 1px solid black; padding-bottom: 2px;"><b>com.eclipseinc.menu.MenuMaint</b></div> <div style="border-bottom: 1px solid black; padding-bottom: 2px;">Java Class</div> </div> Anything after the last period (.) in the program name is the Java class. For a menu option to be available in Solar, it must have a Java Package and Java Class.



Field	Description
<b>Java Passer</b>	<p>The value to pass to the program that identifies which window to display for this menu option.</p> <p>For example, the same program runs report writer and mass load. Menu selections that display the report writer version of the Report Writer/Mass Load Design window use the passer value <b>R</b>. Menu selections that display the mass load version of the Report Writer/Mass Load Design window use the passer value <b>M</b>.</p> <p>For menus that call a user-defined window, set this field to the UD.FORM ID for the window.</p>
<b>Auth Product</b>	<p>If you are adding a companion product, enter the authorization code for the product. If you are not authorized for this companion, this menu option does not display on the menu.</p>
<b>Shown Where</b>	<p>The user interface the program is available in on the menu: <b>Eterm</b>, <b>Solar</b>, or <b>Both</b>.</p>

- Click **OK** to close the window.
- From the **File** menu, select **Save** to save your custom menu. That menu is now available for selection to add to other custom menus in the **Main Menus** list.

## Assigning Custom Menus

Customizing standard Eclipse menus includes one or more two-step processes. After you create a custom menu, you need to assign it. When you customize a submenu, then you also need to customize the menu that links to it.

### Custom Main Menus

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

**Note:** You must be assigned the USER.MAINT.ALLOWED authorization key to assign a user's root menu.

#### To assign a root menu to a user:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter the user whose record you want to update.
3. In the **Root Menu** field, enter the name of the main menu to assign to this user.
4. Save the user record and exit the window.

### Custom Submenus

If you create a custom submenu, you need to assign it to a menu to which the users you created it for have access. For example, your company does not use material data safety sheets (MSDS) and you want to remove this menu option from the FILES menu for all users.

#### To give a user access to a custom submenu:

1. Create a copy of the FILES menu and remove the MSDS program from the menu.
2. Create a copy of the MAIN menu and change the link to the standard FILES menu to point to your copy of the FILES menu.
3. Assign your copy of the MAIN menu as the root menu for your users as described above.

### User-specific Custom Menus

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

## Custom Report Drivers Overview

Typically, Epicor personnel create custom reports for your site and provide a custom report driver window for you. However, if you are trained to create subroutine and custom programming for your site, you can use the User Defined Solar Window Setup window to create a user interface window for your users to select how they want to run a report that is custom to your site.

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**Important:** If you are unfamiliar with how to setup a custom subroutine for your site, contact your Epicor sales person for information about your custom needs.

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Complete the following steps to create a custom report driver:

- Create the subroutine that searches the database and generates the report content.
- Create the custom report driver window that users use to enter the parameters for which to run the report.
- Add the custom report driver window to a Solar Eclipse menu.

For information about the components that comprise a custom driver window, see Custom Report Driver Components.

## Creating Custom Report Driver Windows

Create a custom report driver to provide a window available from a Solar Eclipse menu. Users can use the window to select the content to include in a report that is custom to your site. Using a custom report driver allows users to select how they want to run the report, similar to how they run a standard system report, such as the A/R Aging Report, without having to know the system data structure.

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**Important:** You must have the User Defined Solar Window Setup window as part of your user menus, and have the subroutine created that gathers the data for the report prior to setting up the custom report driver window. If you are unfamiliar with how to setup a custom subroutine for your site, contact your inside sales person for information about your custom needs.

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### To create a custom report driver window:

1. From the **System > System Programming > User Defined Functions** menu, select **User Defined Solar Window Setup** to display the User Defined Solar Window Setup window.
2. In the **Window ID** field, either enter the ID of an existing window you want to edit or click the **New** button next to the field and enter a new window ID. Window IDs cannot contain spaces and must be unique.
3. Use the **Input Definitions** area to define the fields you want to include in the report driver.

Define a single input type per line in the table. The fields display in the window from top to bottom in the order they are listed in the table. Select a row and use the Move Up and Move Down buttons to move the rows to be in the correct order.

Place the Separator input type between sections of your windows for easier readability.

For each input type you add, provide the following information:

Field	Description
<b>Input Type</b>	Select the type of field you want to define, such as a branch input field or a date input field. For a description of the input types and the options associated with each, see Custom Report Driver Components.
<b>Prompt</b>	Enter the field name that displays to identify the type of data the user should enter. For example, if you are defining a date range, for the first date field, enter <b>Start Date</b> as the field name.
<b>Required</b>	Select this check box if users must enter a value or make a selection in the field prior to running the report. For example, if you are defining a branch input field, you might require that at least one branch is entered prior to running the report.
<b>Length</b>	Enter the maximum number of characters allowed in the field. This field applies to <b>Branch</b> , <b>Date</b> , <b>Number</b> , and <b>String</b> input types.
<b>Validation</b>	Select the area of the system to verify entries against. For example, select <b>Customer</b> to check that the entry in the field matches a customer in Customer Maintenance. For a list of validation types, see Custom Report Driver Components. This field applies to the <b>String</b> input type.

Field	Description
<b>Conversion</b>	Select what the system converts the value entered in the field to after it completes the validation, such as the <b>Description</b> from Buy Line Maintenance. For a list of conversion types, see Custom Report Driver Components. This field applies to the <b>String</b> input type.
<b>Decimals</b>	Enter the number of decimal places the field accepts. For example, if you are setting up a number field that represents a dollar amount, enter <b>2</b> to indicate that the field can accept a number such as \$100.01. This field applies to the <b>Number</b> input type.
<b>Options</b>	Some input types contain different options for the field. For example, for a branch input field you can select whether a user can enter any branch, or only those they are authorized to view. The options vary for each field's function. Review the options available for each input type and make your selections as necessary. For more information, see Custom Report Driver Components.
<b>Multi-Allowed</b>	Select this check box if multiple inputs for the field are accepted. For example, if you are defining a branch input field, select this check box if the user can select to run the custom report for more than one branch at a time. This field applies to <b>Branch</b> and <b>String</b> input types. If you are defining a branch input field, the user is allowed to enter multiple branches or territories. If you are defining a string input field, the field in the report driver includes a <b>Multiple</b> button next to the field.
<b>Additional Data</b>	For the <b>Radio</b> and <b>Check Box Group</b> input types, use this field to indicate the names of the options included in those groups. The first option in the list is the default selection. For more information and examples, see Custom Report Driver Components.
<b>Field Save ID</b>	This is a free-form field that allows you to specify an ID. For example, a good ID for a Customer field might be &rdquo;CUS.ID". If this field is populated, then the value the user enters this field on the report driver is saved when the user runs the report. The next time the user opens the driver window, the last value they had in the field automatically populates. The entry in this field must be all uppercase and can contain no spaces. This field applies only to input fields, not to check boxes or radio buttons.
<b>Parameter Name</b>	Enter the parameter name from the parameter listing of the subroutine you are using for this custom report driver.

4. In the **Window Title** field, enter the name you want to display at the top of the custom driver you are creating.
5. In the **Phantom Routine** field, enter or select the subroutine you created that runs for the report.
6. In the **Selection Type** field, choose which selection menu type you want to add to the driver window. The Selection menu is standard on nearly all Solar Eclipse reports, and allows a user to narrow the information contained in the report.
  - **None** - Does not add a Selection menu to the report driver.
  - **Sales** - Includes a **Selection** menu with selection criteria that is specific to sales orders, such as **Credit Card Types** and **Customer PO#**. See the **Selection** menu in the Open Sales Orders Report for an example.

- **Purchase** - Includes a **Selection** menu with selection criteria that is specific to purchase orders, such as **Pay To Vendor Types** and **Payment Terms**. See the **Selection** menu in the Open P/Os Report for an example.
  - **Payable** - Includes a **Selection** menu with selection criteria that is specific to accounting and payables, such as Invoice ID and Report Currency. See the **Selection** menu in the Check Register Report for an example.
7. In the **Report Options** area, select whether users can print the report, send it to their hold file, or transmit it using e-mail or by fax.
  8. From the **Tools** menu, select **Generate Framework Code** to get the basic code to start building the routine for the report. You can copy all to the computer clip board and paste it in your program.
  9. Save your report driver and add it to a Solar Eclipse menu.

## Custom Report Driver Components

Each custom report driver that you create consists of the following components:

- **Window ID** - A unique identifier for the window that you can then use to add it to a Solar Eclipse menu in Menu Maintenance.
- **Input Definitions** - The fields and their options to include in the driver window, such as date ranges and customer names. For more information about the input types you can add and the options that apply to each, see Input Types and Options below.
- **Window Title** - The name that displays at the top of the window. For example, the title of the window you use to define your custom report drivers is "User Defined Solar Window Setup."
- **Report Options** - The subroutine written to gather the report information as specified using the custom driver window, along with the options to print, e-mail, fax, or send a report to the Hold file. The subroutine is something that you, or Eclipse personnel write that is specific to your needs.

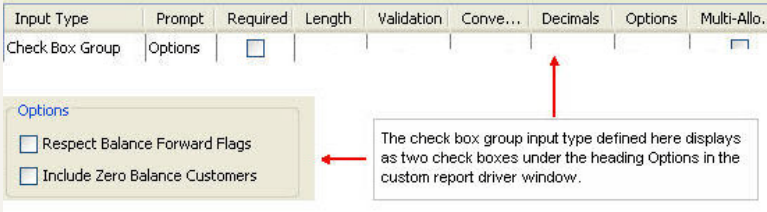
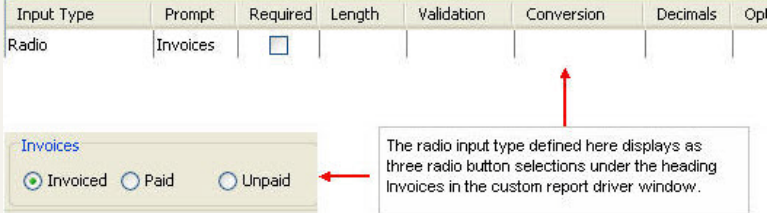
## Input Types and Options

Each input type, or field, you define for a custom report driver has a unique set of potential validations, conversions, and options you can define. Use the following table to determine what you can set for each input type. For information about including input fields in a custom report driver window, see Creating Custom Report Driver Windows.

Input Type	Description	Validation, Conversion, Options, and Additional Data
<b>Branch</b>	Adds an input field that validates against the available branches defined in your system.	In the <b>Options</b> field, select one of the following: <ul style="list-style-type: none"> <li>• <b>All Branches</b> - The user can enter any branch that is defined in your system.</li> <li>• <b>Authorized Branches</b> - The user can only enter branches to which they are authorized in User Maintenance. This is the default.</li> </ul>
<b>Date</b>	Adds a date input field that accepts dates in the standard mm/dd/yyyy format.	In the <b>Options</b> field, select one of the following: <ul style="list-style-type: none"> <li>• <b>None</b> - Allows any valid calendar date. This is the default.</li> <li>• <b>Variable Dating</b> - Allows any valid calendar date, and also allows variable dating in the date field so the date can change as needed for scheduling purposes.</li> </ul>
<b>Number</b>	Adds a field that accepts numeric data, such as for dollar amounts.	In the <b>Options</b> field, select one of the following: <ul style="list-style-type: none"> <li>• <b>None</b> - Allows only positive numbers with the number of decimal places defined in the <b>Decimals</b> field. This is the default.</li> <li>• <b>Allow Negative</b> - Allows positive and negative numbers with the number of decimal places defined in the <b>Decimals</b> field.</li> </ul>

Input Type	Description	Validation, Conversion, Options, and Additional Data
<b>String</b>	Adds a text string field, such as to enter a buy line, price line, customer, or vendor.	<p>In the <b>Validation</b> field, select what the system checks the text entered against to ensure it is a valid entry:</p> <ul style="list-style-type: none"> <li>• <b>Customer</b> - Validates that the text entered matches a customer in Customer Maintenance.</li> <li>• <b>Vendor</b> - Validates that the text entered matches a vendor in Vendor Maintenance.</li> <li>• <b>Product</b> - Validates that the text entered matches a product in Product Maintenance.</li> <li>• <b>Price Line</b> - Validates that the text entered matches a price line defined in Price Line Maintenance.</li> <li>• <b>Buy Line</b> - Validates that the text entered matches a buy line defined in Buy Line Maintenance.</li> <li>• <b>Sell Group</b> - Validates that the text entered matches a sell group defined in Buy/Sell Group Maintenance.</li> <li>• <b>Buy Group</b> - Validates that the text entered matches a buy group defined in Buy/Sell Group Maintenance.</li> <li>• <b>User</b> - Validates that the text entered matches a user ID defined in User Maintenance.</li> <li>• <b>Custom</b> - Validates that the text entered matches the custom code validation you provide. For example, D:, Option One, Option 2 validates against a predefined list of options.</li> </ul> <p>In the <b>Conversion</b> field, select what the system converts the entered value to in the corresponding string field.:</p> <ul style="list-style-type: none"> <li>• <b>Entity Desc</b> - Converts the text entered to the customer or vendor name as defined in Customer or Vendor Maintenance.</li> <li>• <b>Product Desc</b> - Converts the text entered to the product description as defined in Product Maintenance.</li> <li>• <b>Price Line Desc</b> - Converts the text entered to the description for a price line ID as defined in Price Line Maintenance.</li> <li>• <b>Buy Line Desc</b> - Converts the text entered to the description for a buy line ID as defined in Buy Line Maintenance.</li> <li>• <b>User Name</b> - Converts the text entered to the name as defined in User Maintenance.</li> <li>• <b>Upper Case</b> - Converts the text entered to all UPPERCASE letter.</li> <li>• <b>Lower Case</b> - Converts the text entered to all lowercase letters.</li> <li>• <b>Custom</b> - Converts the text entered to the custom code validation you provide.</li> </ul>



Input Type	Description	Validation, Conversion, Options, and Additional Data
<b>Yes/No</b>	Adds a check box field, that if selected is set to <b>Yes</b> , and if deselected is set to <b>No</b> . Use this field for a single check box that is not part of a group. Use the <b>Check Box Group</b> input type to set up a series of check boxes that are grouped together under an area heading.	No additional settings apply to <b>Yes/No</b> fields.
<b>Check Box Group</b>	Adds a group of check boxes contained within a border with a title equal to what you enter in the <b>Prompt</b> field.	<p>In the <b>Additional Data</b> field, enter the names of the check boxes you want to include in the group of check boxes, separated by commas. The first option in the list is the default selection. Example.</p> 
<b>Radio</b>	Adds a group of radio buttons, where a user can select only one option, contained within a border with a title equal to what you enter in the <b>Prompt</b> field.	<p>In the <b>Additional Data</b> field, enter the names of the radio buttons you want to include in the group of radio buttons, separated by commas. The first option in the list is the default selection. Example.</p> 
<b>Include/Exclude</b>	Adds a field that contains the options <b>Include</b> or <b>Exclude</b> to include or exclude a type of data from the report. Enter the field name in the <b>Prompt</b> field.	<p>In the <b>Options</b> field, select one of the following:</p> <ul style="list-style-type: none"> <li>• <b>None</b> - Contains the <b>Include</b> and <b>Exclude</b> options for the field. The field on the report driver window displays with the name in the <b>Prompt</b> field with Include/Exclude in parentheses. This is the default.</li> <li>• <b>Add "Only" Option</b> - Adds an <b>Only</b> option, so users can select to include only the item defined in the field. The field on the report driver window displays with the name in the <b>Prompt</b> field with Include/Exclude/Only in parentheses.</li> </ul>

Input Type	Description	Validation, Conversion, Options, and Additional Data
<b>Separator</b>	Adds a line to separate portions of the window. You cannot have a separator as the first field in the window.  Use separators to group like fields on a window for easier user entry.	No additional settings apply to separators.

## Adding Custom Report Drivers to Solar Eclipse Menus

After you create a custom report driver, add it to a Solar Eclipse menu and then assign that menu to any users that you want to have access to the report driver.

The menu you create is assigned as the user's main menu in Solar. Ensure that you have also included the other menu options that you want users to have access to.

**Note:** Users must exit Solar and log in again to see the new menu options.

### To add a custom report driver to a Solar Eclipse menu:

1. From the **System > System Files > User Control** menu, select **Menu Maintenance** to display the Menu Maintenance window.
2. Display an existing menu to which you want to add the report driver, or create a new menu.
3. Click **Add Solar Report**, enter the ID of the report driver you created in Creating Custom Report Driver Windows, and click **OK**.
4. Enter the title of the report driver the way you want it to display on the menu and click **OK**.  
The Advanced Properties window for the menu item displays with the following information needed to add the report driver to the menu, for example, the JavaClass `UserDefinedReportDriver`.
5. Click **OK** to return to Menu Maintenance.
6. Save your menu and exit the window.
7. From the **System > System Files > User Control** menu, select **User Maintenance** and display the user to which you want to add the menu you just created.
8. From the **Maintenance** menu, select **Solar Eclipse Options** to display the Solar Eclipse User Maintenance window.
9. In the **Solar Main Menu** field, enter the menu to which you added the custom report driver.
10. Save your changes and save the user record.

## User-Defined Functions Overview

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

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

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

## Maintaining User-Defined Labels

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

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

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

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

### To maintain user-defined labels:

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

You must be assigned the SYSTEM.PROGRAMMING authorization key to use these label format maintenance programs.

**Note:** If prompted, log on to the character-based system.

- In the **Label Format Title** field, enter an identifying name for the label format.
- In the **Subroutine Name** field, enter **OIDIMAGING.OUT**, the subroutine that prints the label document.
- In the **Typ** field, enter one of the following subroutine types:

- **IM** - Item specific, multi-call.
- **IS** - Item specific, single-call.
- **OM** - Order specific, multi-call.
- **OS** - Order specific, single-call.
- **NO** - No auto looping.

The writer of the subroutine can tell you which type to assign.

6. In the **Form** field, press **F10** and select the form on which the designated label prints, such as **LABEL**.

**Note:** The system determines which printer has this form loaded. Define forms on the Forms Definition screen.

7. Press **Esc** to save the information and exit the screen.

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

## Maintaining User-Defined Upload Formats

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

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

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

### To maintain user-defined upload formats:

1. Display the User Defined Upload Format Maintenance screen in one of the following ways:
  - From the **System > System Programming > User Defined Functions** menu, select **User Defined Upload Processing**.
  - From the **Tools > User Defined Documents** menu, select **User Defined Upload Processing**.

**Note:** If prompted, log on to the character-based system.

2. In the **Label Format Title** field, enter a name that identifies the data to upload.
3. In the **Subroutine Name** field, enter the name of the subroutine that uploads the data.

**Note:** The **Typ** and **Form** fields do not apply to upload processing, and the **DDE Subroutine** hot key is for internal use by Eclipse personnel only.

4. To limit subroutine access to users assigned a designated authorization key, use the **Authorization** hot key.

At the prompt, select the authorization key which must be assigned to the user.

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

## Maintaining User-Defined OE Import Formats

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

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

### To maintain user-defined OE import formats:

1. Display the User Defined Bid Upload Format Maintenance screen in one of the following ways:
  - From the **System > System Programming > User Defined Functions** menu, select **User Defined OE Import**.
  - From the **Tools > User Defined Documents** menu, select **User Defined OE Import**.

**Note:** If prompted, log on to the character-based system.

2. In the **Label Format Title** field, enter a name that identifies the data to import.

This name displays in the **F10** options list for the **File Format** field on the Order Entry Data Import screen.

3. In the **Subroutine Name** field, enter the name of the subroutine that imports the data.

**Note:** The **Typ** and **Form** fields do not apply to importing data, and the **DDE Subroutine** hot key is for internal use by Eclipse personnel only.

4. To limit subroutine access to users assigned a designated authorization key, use the **Authorization** hot key.

At the prompt, select the authorization key, which must be assigned to the user.

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



## User-Defined Screens through Eterm

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

**Note:** You must attend a class or receive training before you can create user-defined screens in the character-based system. Visit the Eclipse Customer Support Website for further information.

- You can create user-defined screens and append them to standard screens without affecting the integrity of the original screen or associated files.
- You can also create stand-alone user-defined screens to use with user-defined files, such as report drivers.
- If you have created and attached a user-defined screen in the character-based system, you can display and use a Windows version of that screen in Solar Eclipse.

Not all facets of a screen developed in the character-based system work in Solar Eclipse due to differences in the interface technology. Fields could behave differently in Solar Eclipse than they do in the character-based system.


Test any screens you create in the character-based system on an individual basis.

## Adding User-Defined Table Columns

In order to give you better ability to configure Eclipse to best meet your needs on a daily business in how you do your work, you can add any data represented by an Eclipse Dictionary to tables in Solar Eclipse that have a View Manager. The View Manager provides quick access to all views which you are authorized to see and is readily available throughout Solar Eclipse on tables such as the Inventory History Ledger, A/R Inquiry, Sales Order Entry, Suggested P/O Queue, and the P/O Variance Queue.

**Note:** You can assign any views you create to other users, as needed. Users may need to close the window or log off and back in to Solar Eclipse to see the change and use the new views assigned to them.

### To add a user-defined table column:

1. Display the window with the table to which you want to add a column.
2. Click the View Manager icon  and select **User Defined View Maintenance** to display the User Defined View Maintenance window.
3. From **File** menu, select **User Defined Table Columns** to display the User Defined Table Columns window.
4. Complete the fields, as needed. Required fields are marked with an asterisk.

Field	Description
<b>Column ID</b>	A free-form field to label your column information. This ID is for your reference only. We highly recommend following a standard naming convention so you can locate your user-defined column descriptions later.
<b>Column Name*</b>	The actual label for the column to display in the table.
<b>Key Column*</b>	The identifier, or key, for the information you get from the file selected, such as Warehouse #. This key is an exact match to the record ID in the file from which you are getting the additional field data. For example, if the 4-digit branch is in an existing view, you can use that as the key to the Territory file to gain access to the dictionaries from the Territory file.
<b>Universe File</b>	The file in the system from which you want to pull information, such as TERRITORY. Mutually exclusive with Pick Program and available only if the Column Data Source is set to Universe File.
<b>File Dictionary</b>	The item within the file that you want to populate on the table, such as TERRITORY_DESC, within the Universe file selected.
<b>Pick Program</b>	Mutually exclusive with Universe File and available only if the Column Data Source is set to Pick Program.

5. In the **Column Data Source** area, select **Universe File** or **PICK Program** to tell the system which kind of file you are using for the column data. For example:

User Defined Table Columns - Inventory Inquiry - 2 PVC-DWV 1/4 BEND HXH (90) (#300)

File Edit User Tools Help

Column ID: BRANCH.SHORT.NAME [?] New

Column Name: Br Name

Key Column: Warehouse # [?]

Universe File: TERRITORY [?]

File Dictionary: TERRITORY\_DESC [?]

Column Data Source

☒ Universe File ☐ PICK Program

Created By: MARKA

5. Save your changes and exit the window to apply your new column. For example:

Inventory Inquiry - 2 PVC-DWV 1/4 BEND HXH (90) (#300)

File Edit Inquiry Maintenance Johnstone User Tools Help

Next Item Future Ledger History Ledger Product Location Sales History

Product: 2 PVC-DWV 1/4 BEND HXH (90) (#300)

Description: 2 PVC-DWV 1/4 BEND HXH (90) (#300)

Product Information

Status: Stock

Weight: 0

Load: 0.02

Buy Line: FPD

Price Line: FPD

Catalog Page # and Distribution Center Onhand

No Page #

Warehouse #	Br Name	Available	In P/O	In Transfer	Rank	Demand	30 Day Sales	365 Day Sales	Package Qty	UM
2	HYANNIS	665	0	0	1	1GGBB	0.18	0	2	50 ea
3	PROVIDENCE	695	0	0	0	FFEDF	0.81	0	10	50 ea
4	YARMOUTH	986	0	0	0	GFEDF	0.57	7	17	50 ea
6	MASHPEE	0	0	0	0	EEEDF	0.00	0	0	50 ea
50	PORTLAND	0	0	0	0		0.00	0	0	50 ea
33	BLUE BLAZES	0	0	0	0		0.00	0	0	50 ea

Product: 7839

1 of 6

## Appending User-Defined Fields to Screens

Based on your business needs and the tasks you need to perform in various windows, you may find you would be more efficient if you could add one or two fields to an existing window. You can create user-defined fields or pull information for a specific field you want to add and append them to standard windows without affecting the integrity of the original window or its associated files.

You can append, or attach, fields to the right, left, or bottom of the current window. You cannot append fields without creating the fields or screen first using the User-Defined Screen Designer.

Before adding fields, consider how much space exists on the current window. The fields you add append to the bottom of the window and the system may truncate other parts of the window if there is a lot of information to display, such as the Vendor Maintenance window.

**Note:** As of Release 8.7.2, this functionality is available only for Customer Maintenance, Product Maintenance, Vendor Maintenance, and Branch Maintenance.

### To append a user-defined field:

1. Display the window to which you want to append additional fields.
2. From the **User Tools** menu, select **Attach User Defined Screens** to display the User Defined Screen Attachments.
3. Select the area you want to add the fields to:
  - **Left User Defined Screen** - Appends fields to the left-hand side of the window.
  - **Right User Defined Screen** - Appends fields to the right-hand side of the window.
  - **Bottom User Defined Screen** - Appends fields to the bottom of the window below all standard fields.

**Note:** There may be pre-defined buffers around the fields you add because they are coming from Eterm-defined screens. This can affect how your standard fields display and how the window resizes.

4. In the **UD Screen ID** field, enter the identifier for the fields you want to add, such as HAJO.BR.SOLAR.
5. In the **Screen Key** field, select the data type to populate in the field, such as ACTIVE. This selection is used to pull data in from the file used for the screen you are attaching.
6. Click **OK** to save your changes and exit the window.

For example:

Customer Maintenance - CATERPILLAR

File Edit Orders Pricing Additional User Tools Help

Customer: CATERPILLAR [?] New Customer

Name: \*CATERPILLAR

Address: 3701 STATE RD 26 EAST

City: \*LAFAYETTE

Zip: 47905-4856 [?] State: IN Country:

Sort by: \*CATERERS Y

Bill-To: [?]

Index: \*CATERPILLAR

Type	Number
MAIN	317-425-8876
MAIN FAX	317-425-8880
PLANT OFFICE	317-425-8017
PROCUREMENT OFFICE	317-425-8656

Phonics Contacts WWW

Customer Type

☒ Bill-To

☒ Ship-To ☐ Ship-To Address Changes Restricted

☐ Branch ☐ Branch Cash Account

☐ Prospect ☐ Customer P/O Required

☐ Auto-Delete ☐ Customer Release Number Required

Statement Type: Open Item [?]

Backorder Status: Ship When Available [?]

Outside Salesperson: MARKA [?]

Inside Salesperson: ROBIN [?]

Ship Via: OUR TRUCK (1) [?]

Freight In Exempt: No [?]

Freight Out Exempt: No [?]

Customer Sales Info

Credit Limit: 250000

Current A/R: 519193.54

Sales Information

	Last Yr	This Yr
Q1	494945	394995
Q2	340734	405272
Q3	368685	473994
Q4	492009	0
=====	=====	=====
	1696373	1274261

Sales Budget: 1,825,000

Customer Type: OEM

Status: Green

## User-Defined Views Overview

Throughout the system, many windows display with tables that contain various information. From these windows, you often have access to different views to see different data. You might find that you or your users need to see some data from one view and some from others, or that you want to only see a subset of the data in one view.

**Note:** You cannot create user-defined views in the Body of a sales, purchase, or transfer order. You also cannot create a user-defined view in the Order View All Totals window or in Quick Sell Matrix Maintenance.

To give you access to information you need in a window, create a user-defined view that contains the columns of data that you use the most in that window.

Using user-defined views allows you to do the following:

- Create a view as that contains the information you need. You can choose to base your view on an existing Eclipse view.
- Save your view as the default, so it displays each time you enter the window.
- Assigning individual users and user groups to the view.
- Create view templates with multiple views that you can assign to other users.
- Still access system-defined views.

The following authorization keys are required for working with user-defined views:

- SOLAR.UD.VIEW.CREATE
- SOLAR.UD.VIEW.ASSIGN

**Note:** If a user does not have access a column within a window, the data in that field within the view is blank for that user.

## Creating User-Defined Views

Throughout the system, many windows display with tables that contain various information. From these windows, you often have access to different views to see different data. You might find that you or your users need to see some data from one view and some from others, or that you want to only see a subset of the data in one view.

**Note:** Users may need to close the window or log off and back in to Solar Eclipse to see the change and use the new views assigned to them.

If you are assigned the SOLAR.UD.VIEW.CREATE authorization key, you can create a user-defined view in any window that contains views. The view you create is specific to the window in which you create it.

To assign a user-defined view to other users, create a template that contains the view and assign the template to the user. To add a column outside the standard column views, see Adding user-Defined Table Columns.

**Note:** If a user does not have access a column within a window, the data in that field within the view is blank for that user.

### To create a user-defined view:

1. From any window that has different views, click the icon in the upper right corner of the table and select **User-Defined View Maintenance** from the list.

You can also access User-Defined View Maintenance by selecting User-Defined View Maintenance from the menu that you use to change views in the window..

2. In the **View ID** field, click **New**, enter a short ID that identifies the view, and click **OK**. For example, ACCT.SUPERVISOR.

**Note:** View IDs cannot contain special characters such as \*, (, ), or &.

3. In the **View Description** field, enter a title for the view. This is the title that displays in the **Change View** menu when you complete the view.
4. To base your view on an existing view for the window, select **File > Start with Eclipse view** and select the view that you want to start with. The system populates the **On Table** and **Not Used** lists with the columns that are included in that view.

**Note:** Some windows have columns that are required in each view. Required columns are highlighted in red to indicate that you must include them in the view.

5. Select the column names and use the **Add** and **Remove** buttons as appropriate to list all the columns you want to include in the view in the **On Table** list.
6. Select a column in the **On Table** list, and use the **Move Up** and **Move Down** buttons to position the columns in the correct order.

The columns display from left to right in the view as they are listed from top to bottom in the list.

7. Save your changes and exit the window. Your changes are available immediately.

## Assigning Users to User-Defined Views

If you create a view that could be useful to other users, you can assign that view to an individual user, a group of users, or to a template. If you have a set of views for various windows in the system, use a template and assign all the appropriate views to that template. For more information, see [Creating and Assigning User-Defined View Templates to Users](#). If you want to share a view with select users that are not part of a template, you can assign the view to an individual user, or a group of users.

You must be assigned the SOLAR.UD.VIEW.ASSIGN authorization key to create view templates and add views to templates.

### To assign users to user-defined views:

1. From any window that has different views, click the icon in the upper right corner of the table and select **User-Defined View Maintenance** from the list.

You can also access User-Defined View Maintenance by selecting **User-Defined View Maintenance** from the menu that you use to change views in the window.

2. From the **Templates** menu, select **Assign Users to View** to display the User-Defined View Customization - Assign Users to View window.
3. In the **Name** field, enter the system IDs of each user or user group to which you want to assign the view.
4. Click **OK** to return to the User-Defined View Maintenance window.
5. Save your changes and exit the window.



## Opening User-Defined Views

User-defined views are accessible from the same menu in a window that you would use to change your view. This menu is often a **View** menu or a **Change View** menu. User-defined views are listed below the standard views defined for the window.

**Note:** Users may need to close the window or log off and back in to Solar Eclipse to see the change and use the new views assigned to them.

All users can view user-defined views that they have been assigned. However, you must have the SOLAR.UD.VIEW.CREATE authorization key to create your own views. You must have the SOLAR.UD.VIEW.ASSIGN authorization key to edit views that were assigned to you through a template.

### To open a user-defined view:

1. From any window that has views, select the menu that you use to access different views, such as **View > Change View** or **Change View**, and select the user-defined view from the list.

You can also open the view by clicking the icon in the upper right side of the table and selecting the view from the list.

2. To save a user-defined view as your default view for a window, right-click in the heading row of the table and select **Save Settings**.

If you have saved a user-defined view as your default setting, and that view is no longer available, the next time you access the window, the system uses the default system view.

## Creating and Assigning User-Defined View Templates to Users

Much like custom toolbars, you can define a view for a window and assign that view to a template. You can then assign that template to a set of users so they all have access to the same view. For example, at your site you might decide that you want all users of a particular window to have access to a set of user-defined views.

Create a template to include all the views for various windows to assign to your users. You can then assign users the template and they receive all the views for different windows at once. Templates save you time in setting up your users with what they need in each window.

You must be assigned the SOLAR.UD.VIEW.ASSIGN authorization key to create and assign templates to users, however, any user can be assigned to a template.

To assign a view to a user without creating a template, see Assigning User-Defined Views to Users.

**Note:** Users may need to close the window or log off and back in to Solar Eclipse to see the change and use the new views assigned to them.

### To create and assign user-defined view templates to a user:

1. From any window that has different views, click the icon in the upper right corner of the table and select **User-Defined View Maintenance** from the list.

You can also access User-Defined View Maintenance by selecting **User-Defined View Maintenance** from the menu that you use to change views in the window.

2. From the **Templates** menu, select **Create Template**.
3. Enter the name of the template and click **OK**. For example, if you are creating a template of views for your accounting supervisors, name the view ACCT.SUPERVISOR.
4. From the **Templates** menu, click **Assign Users To Template** and select the template you created in step 3.
5. In the **User** field, enter the system IDs of the users to which you want to assign to the template. Each user that is assigned to the template can see the views that you add to the template.
6. Click **OK** to return to the User-Defined View Maintenance window.
7. Assign a view to the template.

## Assigning Templates to User-Defined Views

Much like custom toolbars, you can define a view for a window and assign that view to a template. You can then assign that template to a set of users so they all have access to the same view. For example, at your site, you might decide that you want all users of a particular window to have access to a set of user-defined views.

You must be assigned the SOLAR.UD.VIEW.ASSIGN authorization key to create view templates and add views to templates.

**Note:** You can assign a view to multiple templates. Users may need to close the window or log off and back in to Solar Eclipse to see the change and use the new views assigned to them.

To assign a view to a user without creating a template, see [Assigning User-Defined Views to Users](#).

### To assign a user-defined view to a template:

1. From any window that has different views, click the icon in the upper right corner of the table and select **User-Defined View Maintenance** from the list.

You can also access User-Defined View Maintenance by selecting User-Defined View Maintenance from the menu that you use to change views in the window..

2. Create and assign users to a template. For more information, see [Creating and Assigning User-Defined View Templates to Users](#).
3. From the **Templates** menu, select **Assign Templates to View** to display a list of all the user-defined view templates in the system.
4. Select the templates to which you want to add the view and click **OK**. You can add a view to multiple templates.

The User-Defined View Maintenance window now displays the number of templates to which the view is assigned in the bottom left corner.

5. Save your changes and exit the window.

The next time users assigned to the template access the window, the new view is available to them in the **Change View** menu, or by clicking the icon above the table.

## Creating and Editing User-Defined F9 Help in the Character-Based System

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

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

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

### To create or edit user-defined F9 help:

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

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

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

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

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

- Pressing **Enter** within a paragraph does not cause the following text to wrap to the next line.
- Pressing **Enter** at the end of text does cause the cursor to wrap to the start of the next line.
- The **Tab** key does not work.
- The **Backspace** key does not delete text.
- The **Delete** key works normally.
- Bullets do not upload as bullets.
- To move text to the next line, press the **Insert** key, place the cursor at the start of the text to be moved, and press the **Spacebar** until the text wraps.
- To insert a blank line between paragraphs, press **Alt-Insert**.
- To remove a blank line, place the cursor in the line and press **Alt-Delete**.
- If you upload text into a Help Document Maintenance screen that contains existing text, the uploaded text will replace everything on the screen.

- When copying and pasting text with Eterm for Windows, you can paste new text at the end of the existing text. Just be sure to position the cursor correctly.
3. Press **Esc**.  
The system displays the following prompt: Item changed. Update file?
  4. At the prompt, enter **Y**.  
The system saves the updated text as the User version of the help.
- Note:** Regardless of whether you edited the User version or the Eclipse version of the help, the system saves your changes as the User version.

## Viewing User-Defined F9 Help

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

### To display user-defined F9 help:

1. Position your cursor in the field for which you want to view the user-defined help and press **F9**.  
In the screen title, the asterisk (\*) preceding and "User version" following the field ID indicate that you are viewing user-defined help.
2. Use the **Eclipse Version** hot key to display the system help for this field.
3. Use the **User Version** hot key to re-display the user-defined help.

## Viewing User-Defined F11 Help in the Character-Based System

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

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

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

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

**Note:** You must have Superuser authorization to use the **Shift-F11** key. If prompted, log on to the character-based system.

This screen lists the user-defined help topics assigned to this screen.

2. Use the **Web Help** hot key to display the Address to Web Help screen.
3. Delete the text displayed on this screen.
4. Press **Esc** two times to exit both screens.

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

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

The system lists the help topics assigned to the screen.

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

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

1. From the **System > System Files > Documentation** menu, select **Help Document Maintenance** to display the Help Document Maintenance screen.

**Note:** If prompted, log on to the character-based system.

2. In the **Keyword** field, do one of the following:
  - Enter a keyword from the help topic title.
  - Enter a period followed by the document number assigned to the help topic.

The system displays the help topic or a list of help topics that match your selection criteria.

3. Select the topic to view and press **Enter**.
4. When finished reading the help topic, press **Esc** to exit the help topic.

## Creating and Editing User-Defined F11 Help in the Character-Based System

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

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

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

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

Use the following tasks to:

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

### To create user-defined F11 help:

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

### To copy and edit user-defined F11 help:

1. Display the document you want to copy in one of the following ways:



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

**Note:** If prompted, log on to the character-based system.

2. Use the **Copy** hot key.

The system assigns a new ID number to the displayed document.

3. Edit the **Topic Heading**, **Keywords**, and **Text** fields for the new document, as described in the task for creating F11 help.
4. Note the help topic ID number and then press **Esc** to save the F11 help topic.

#### To edit user-defined F11 help:

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

**Note:** If prompted, log on to the character-based system.

2. When typing, uploading ,or pasting text, be aware that the F9 help screen does not have all the features of a word processor, nor does it work like a typical word processor. Adhere to the following guidelines:
  - Pressing **Enter** within a paragraph does not cause the following text to wrap to the next line.
  - Pressing **Enter** at the end of text does cause the cursor to wrap to the start of the next line.
  - The **Tab** key does not work.
  - The **Backspace** key does not delete text.
  - The **Delete** key works normally.
  - Bullets do not upload as bullets.
  - To move text to the next line, press the **Insert** key, place the cursor at the start of the text to be moved, and press the **Spacebar** until the text wraps.
  - To insert a blank line between paragraphs, press **Alt-Insert**.
  - To remove a blank line, place the cursor in the line and press **Alt-Delete**.
  - If you upload text into a Help Document Maintenance screen that contains existing text, the uploaded text will replace everything on the screen.

- When copying and pasting text with Eterm for Windows, you can paste new text at the end of the existing text. Just be sure to position the cursor correctly.
3. Press **Esc** to save the F11 help topic.

**To assign user-defined F11 help to a screen:**

1. Display the screen to which you want to assign a user-defined help document.
2. Press **Shift-F11** to display the Help Topics Maintenance screen.  
**Note:** If prompted, log on to the character-based system.
3. On a blank line, type the title of your document and press **Enter**.  
**Note:** To insert a blank line, position the cursor on an occupied line and press **Alt-Insert**.
4. In the **Help Doc #** field, type the number of the document you are assigning and press **Esc**.  
The system assigns your help document and returns you to the program screen.

## Order Entry Views Maintenance Overview

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

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

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

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

## Creating Custom OE Views

Use the Order Entry View Maintenance window to create custom views for order entry body windows.

Although you cannot edit standard views, you can copy and rename them. You can then edit the copied views to create custom views. You can also build custom views. If a custom view becomes obsolete, you can delete it.

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

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

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

Use the following procedures to:

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

### To create a custom order entry view:

1. Display the Order Entry View Maintenance window in one of the following ways:
  - From the **System > System Programming > User Defined Functions** menu, select **User Defined OE Views**.
  - From the **Tools > User Defined Documents** menu, select **User Defined OE Views**.
2. In the **View ID** field, enter or select **New** to display the following prompt: Enter New ID.
3. At the prompt, enter an ID for the new order entry view and click **OK**. The ID can be up to 20 characters.
4. In the **Mode** field, select whether the view applies to sales, purchase, or transfer order entry.
5. In the **Description** field, enter a description of the view, using up to 40 characters.  
This description displays in the list of available views on the order entry screens.
6. To display the alternate product description when this view is used, select the **Alternate Description** option. Otherwise, the system displays the primary product description.
7. By default, the system assigns two required view elements to all order entry views: QUANTITY and PRODUCT.DESC.
  - You can change the value in the **Heading** field for QUANTITY. For example, you can name it **Item Quantity**.
  - You can change the values in the **Heading** and **Width** fields for PRODUCT.DESC.
8. In the **Columns** area of the window, select an order view element and click the **Add** button to add it to the view.

The system populates the **Update Allowed**, **Multi-Lined**, **Override Allowed**, **Heading**, **Width**, **Decimal Places**, **Conversion**, **Justification**, and **Negative** fields, based on the dictionary item definition.

9. Edit the fields in the **Column Options** area of the window as needed, using the following guidelines:

Field	Guidelines for Editing
<b>Update Allowed</b>	Select this option if a user can update this field when using this view in order entry.
<b>Mult-Lined</b>	Select this option if the column is multi-valued.
<b>Override Allowed</b>	Select this option to reserve one character of the column width for displaying an override asterisk (*). The designated view column displays an asterisk when overridden. Otherwise, override asterisks never display.
<b>Heading</b>	The column heading for this field. A column heading can only be as long as the field width.
<b>Width</b>	The width of the column in character spaces. Change the width as needed. As you build the view, the system tracks and displays the current view width in the <b>Total Width</b> field, including space for column separators. The total number of character spaces available for a view is 78. If the width is larger than 78, the <b>Display In</b> field in the status bar of the screen displays <b>Solar</b> . Any views that is 78 characters or less can be viewed in both Eterm and Solar Eclipse environments.
<b>Conversion</b>	The pick output conversion code, which determines the display or report format of the data, if the data in this column is numerical.
<b>Decimal Places</b>	The number of decimal places to display, if the field is numeric.
<b>Justification</b>	Enter <b>R</b> or <b>L</b> to change the justification of the data in the column to the right or left. Right justify dates and numbers.
<b>Negative</b>	Select this option to allow negative numbers. You can only select this option for right justified fields.

10. Repeat steps 7 and 8 to add additional dictionary items to the view.
11. Save the view and exit the window.

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

1. Display the Order Entry View Maintenance window in one of the following ways:
  - From the **System > System Programming > User Defined Functions** menu, select **User Defined OE Views**.
  - From the **Tools > User Defined Documents** menu, select **User Defined OE Views**.
2. In the **View ID** field, select or enter the ID of the view to copy.
3. From the **File** menu, select **Copy**.
4. At the prompt, enter the ID of the new view.  
The dictionary items from the copied view populate the window for the new ID.
5. Edit the new view as needed.

6. Save the view and exit the window.

**To delete a custom order entry view:**

1. Display the User Defined Order Entry Views window in one of the following ways:
  - From the **System > System Programming > User Defined Functions** menu, select **User Defined OE Views**.
  - From the **Tools > User Defined Documents** menu, select **User Defined OE Views**.
2. In the **View ID** field, select the view to delete.
3. From the **File** menu, select **Delete**.

The system displays the following prompt: Are you sure you want to delete this from all user profiles?

4. At the prompt, select **Yes**.

## Editing Custom OE Views

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

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

### To edit a custom OE view:

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

See Creating Custom OE Views for field descriptions.

4. Save the updated view and exit the window.

The system displays the Program Change Log Entry window, which shows the name of the file and view updated, along with your user ID, the current date and time, and the view's version number incremented by one.

5. Complete the window as follows:
  - In the **Comment** field, enter a comment describing the changes you made.
  - In the **Activity Log #** field, enter the number of the tracker that prompted the change. If necessary, press **Shift-F4** and create a tracker assigned to your user ID.
  - Exit this window and return to the User Defined Order Entry Views window.

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

6. Display the updated order entry view record again.

The window shows that it is open to your user ID and displays the new version number followed by a modification number. Each time you modify the view while it is open to your user ID, the system increments the modification number.

7. Do one of the following:
  - Make additional changes to the displayed record. Save the record and then return to step 6.

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

- If you are satisfied and finished with the changes you made, click **Close**.

The system releases the displayed view from its open status and makes an entry in the change log for this new version of the view.

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

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

Select **Yes** to undo the changes you made in the new version or select **No** to exit the prompt.

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

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

Select **Version** to undo all of the changes in the new version, select **Modification** to undo only the most recent modification in the new version, or select **None** to exit the prompt.

When you undo a complete version, the view record is no longer open to your user ID.



## Editing Order Entry View Templates

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

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

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

### To edit OE view templates:

1. From the **System > System Files > User Control** menu, select **User Maintenance** to display the User Maintenance window.
2. In the **User ID** field, enter a user's ID to display the corresponding record.
3. From the **Maintenance** menu, select **Order Entry Views** to display the Order Entry View Selection window, which lists the views and templates assigned to this user. The system indicates template IDs with a check mark in the **Template** column.

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

4. Select the template to edit.

The system displays the views assigned to the template in the **Template** area of the window.

5. Do any of the following to edit the template:
  - To add a view to the template, position the cursor on a blank line in the **View** column of the **Template** area and select a view from the list. The system displays the ID and description. Check the order types to which the view applies.
  - To remove a view from the template, select the view and press **Alt+Delete**.
  - To change the template description, select **Change Description** from the **Template** menu. At the prompt, enter the new template description.
  - To delete a template, position the cursor on the ID and then select **Delete** from the **Template** menu. The system prompts you to confirm the deletion.
6. To designate an order entry view as the default for an order type, select one of the following order types in the **Default** field. When the user enters the selected order type, this is the default view. This field applies only to views.
  - NDOE - New Direct OE
  - NSOE - New Sales OE
  - IDOE - Invoiced Direct OE
  - ISOE - Invoiced Sales OE
  - ODOE - Open Direct OE
  - OSOE - Open Sales OE

7. Click **OK** to save this information and return to the User Maintenance window.

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

## Creating Custom OE View Templates

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

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

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

Use the following procedures to:

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

### To create a custom OE view template:

1. Display the Order Entry View Maintenance window in one of the following ways:
  - From the **System > System Programming > User Defined Functions** menu, select **User Defined OE Views**.
  - From the **Tools > User Defined Documents** menu, select **User Defined OE Views**.
2. From the **Edit** menu, select **Template** to display the Select a Template list.
3. Select **New** to display the New Order Entry View Template dialog box.
4. At the **New Template ID** prompt, enter the new template ID. The ID can be up to 20 characters long.
5. At the **Template Description** prompt, enter a description of the template. The description can be up to 30 characters long.

The Order Entry View Template window displays.

6. To add a view to the template, in the **View Element** column, select a view to add.  
**Note:** To delete a view, select the view and from the File menu, select **Delete**.
7. To designate an order entry view as the default for a new, open, or invoiced sales or direct order, in the **Default** column, select the default type of order for the designated view.
8. Save the template and exit the window.

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

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

1. Display the Order Entry View Maintenance window in one of the following ways:
  - From the **System > System Programming > User Defined Functions** menu, select **User Defined OE Views**.

- From the **Tools > User Defined Documents** menu, select **User Defined OE Views**.
2. From the **File** menu, select **Template** and select the template to copy.  
The Order Entry View Template window for the selected template displays.
  3. From the **File** menu, select **Copy**.
  4. At the **Enter New ID** prompt, enter the ID of the new template to create.  
The system creates a template with the new ID and the Defined Order Entry Views window displays. This window is blank.
  5. In the **View ID** field, enter the new template name to display the Order Entry View Template window for the new template.  
The system populates the window with the views from the copied template.
  6. In the **Template Description** field, edit the copied description as needed.
  7. Do any of the following to edit the views assigned to the template:
    - To remove an entry from the template, press **Alt-Delete**.
    - To insert a blank line, press **Alt-Insert**.
    - To add a view to the template, in the **View Element** column, select a view to add.
  8. Save the new template and exit the window.

## Assigning Order Entry Views and Templates to Users

The sales, purchase, and transfer order entry Body screens display different columns of information, depending on the selected view. Views can show information such as unit or extended prices, product availability, shipping, or backorder details.

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

Because not all views are appropriate for all users, assign each user the order entry views related to their job function.

### To assign order entry views and templates to a user:

1. From the **Maintenance** menu, select **Order Entry Views** to display the Order Entry View Selection window, which lists the views and templates assigned to this user.

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

2. To assign a view or template, position the cursor in a blank line in the **View** column of the **View** area, and select a view or template from the list. Template IDs display at the top of the list with a check mark in the **Template** box.

The system displays the view or template ID, along with a check mark for the order type to which the view applies, in the Order Entry View Selection window.

If you select a template, the system displays the views assigned to that template in the **Template** area of the window.

3. You can edit the views assigned to a template, as needed.
4. To designate an order entry view as the default for an order type, select one of the following order types in the **Default** field. When the user enters the selected order type, this is the default view. This field applies only to views.
  - NDOE - New Direct OE
  - NSOE - New Sales OE
  - IDOE - Invoiced Direct OE
  - ISOE - Invoiced Sales OE
  - ODOE - Open Direct OE
  - OSOE - Open Sales OE
5. Repeat steps 2 through 4 to add additional views or templates to the user's profile.
6. Click **OK** to save this information and return to the User Maintenance window.

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

## Creating Order Entry View Elements

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

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

- Dictionary item
- Custom

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

### To use a dictionary item as an order entry view element:

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

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

3. Flag the **Dictionary Information Only** check box.
4. In the **From File** field, select the file in which the dictionary item is located.
5. In the **Dictionary ID** field, select the dictionary item.
6. In the **Dictionary Key** field, select the order element to use as the key to access this dictionary item.
7. Save the record and exit the window.

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

### To create a custom order view element:

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

Field	Description
<b>Description</b>	Enter the description to display as the default column heading for this element.
<b>Verification</b>	Enter the subroutine to use to validate data entered for this element, if necessary.
<b>Conversion</b>	Enter the pick output conversion code, which determines the display or report format of the data stored in this element.
<b>Decimal Places</b>	Enter the number of decimal places to display, if this element is numeric.
<b>Justification</b>	Enter <b>R</b> or <b>L</b> to specify the justification of the data in the column as right or left. Right justify dates and numbers.

Field	Description
<b>Allow Negative</b>	Indicate whether to allow negative numbers. You can only allow negative numbers for right justified fields. <ul style="list-style-type: none"> <li>• <b>Y</b> - Allows negative numbers.</li> <li>• <b>N</b> - Does not allow negative numbers.</li> </ul>
<b>Blank View</b>	Indicate whether the view element displays data in the view. The default is <b>N</b> . <ul style="list-style-type: none"> <li>• <b>Y</b> - The view element does not display data in the column of the view to which you assign it. The system populates the display <b>Subroutine</b> field with the OE.VE.DISP.BLANK subroutine.</li> <li>• <b>N</b> - The view element displays data in the column of the view to which you assign it.</li> </ul>
<b>Multi-line</b>	Indicate whether this element displays on multiple lines.
<b>Override Flag</b>	Indicate whether to reserve one character of the column width for displaying an override character. <ul style="list-style-type: none"> <li>• <b>Y</b> - One character of the column width is reserved for displaying an override character.</li> <li>• <b>N</b> - Override characters never display.</li> </ul>
<b>Show For Comments</b>	Indicate whether to display the contents of this view element on comment lines in the order. <ul style="list-style-type: none"> <li>• <b>Y</b> - Displays for order line items and comment lines.</li> <li>• <b>N</b> - Displays for order line items only.</li> </ul>

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

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

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

Field	Description
<b>Subroutine</b>	Identify a subroutine to be used to process the data entered from a screen to update the view element.
<b>Parameter</b>	If the subroutine performs multiple functions, enter the modifier used to select the function that will update this view element.
<b>Edit Paid Direct</b>	Indicate whether this element is editable on the sales order portion when the purchase order portion of a direct order has been paid. <ul style="list-style-type: none"> <li><b>Y</b> - Editable.</li> <li><b>N</b> - View-only.</li> </ul>

5. Save the record and exit the window.

## Editing Order Entry View Elements

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

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

### To edit an order entry view element:

1. From the **Tools** menu, select **Order View Element Maint** to display the Order Entry View Element Maintenance window.
2. In the **View Element ID** field, enter the ID of the view element to edit.
3. Edit the view elements as needed.

See Creating Order Entry View Elements for field descriptions.

4. Save the updated element and exit the window.

The system displays the Program Change Log Entry window, which shows the name of the file and view updated, along with your user ID, the current date and time, and the view's version number incremented by one.

5. Complete the window as follows:

- In the **Comment** field, enter a comment describing the changes you made.
- In the **Activity Log #** field, enter the number of the tracker that prompted the change. If necessary, press **Shift-F4** and create a tracker assigned to your user ID.
- Exit this window and return to the User Defined Order Entry Views window.

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

6. Display the updated order entry view record again.

The window shows that it is open to your user ID and displays the new version number followed by a modification number. Each time you modify the view while it is open to your user ID, the system increments the modification number.

7. Do one of the following:

- Make additional changes to the displayed record. Save the record and then return to step 6.

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

- If you are satisfied and finished with the changes you made, click **Close**.



The system releases the displayed view from its open status and makes an entry in the change log for this new version of the view.

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

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

Select **Yes** to undo the changes you made in the new version or select **No** to exit the prompt.

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

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

Select **Version** to undo all of the changes in the new version, select **Modification** to undo only the most recent modification in the new version, or select **None** to exit the prompt.

When you undo a complete version, the view record is no longer open to your user ID.

## Customer and Vendor Standard Notes Overview

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

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

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

## Creating and Editing Customer and Vendor Standard Notes

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

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

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

Use the following procedures to:

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

### To create a new customer or vendor standard note:

1. From the **System > System Files > Customer/Vendor Control > Customer/Vendor Standard Notes** menu, select the type of note to create.

**Note:** If prompted, log on to the character-based system.

The system displays a screen listing all the note titles currently defined for that type.

2. Select **\*\* NEW NOTE \*\*** and press **Enter** to display the Note Title screen.
3. Enter a title for the note and press **Esc** to display the screen for that note title.
4. Enter the text of the note and press **Esc**.
5. Press **Esc** to return to the **Customer/Vendor Standard Notes** menu.

### To edit a customer or vendor standard note:

1. From the **System > System Files > Customer/Vendor Control > Customer/Vendor Standard Notes** menu, select the type of note to edit.

**Note:** If prompted, log on to the character-based system.

The system displays a screen listing all the note titles currently defined for that type.

2. Position the cursor on the note to edit and press **Enter** to display the screen for the selected note title.
3. Edit the note as follows:
  - To change the text, type over the existing text or add text to the end of the note. Press **Esc** to save your changes.
  - To change the title, use the **Edit Title** hot key. Type over the existing title and press **Esc** to save your changes.

- To delete the note, use the **Delete Note** hot key. Enter **Y** at the prompt to confirm your deletion.
4. Press **Esc** to return to the **Customer/Vendor Standard Notes** menu.

## Business Closed Days Overview

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

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

### Creating a List of Closed Days

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

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

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

### Editing a List of Business Closed Days

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

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

## Identifying Business Closed Days

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

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

Use the following procedures to:

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

### To create a list of business closed days:

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

For example, if your company is closed on weekends, enter asterisks next to Saturday and Sunday. If it is closed only on Sunday, just flag Sunday.

7. Flag the **Weekly** field by entering an asterisk (\*) next to the field.

**Note:** The **Daily** and **Bi-Weekly** fields are not typically used with the Business Closed Days screen.

8. Press **Esc** to save the schedule and return to the previous screen.

The system adds the designated closed days to the schedule.

9. Press **Esc** to save the Business Closed Days schedule.

### To edit a list of business closed days:

1. From the **System > System Files** menu, select **Business Closed Days Maintenance** to display the Business Closed Days screen.

**Note:** If prompted, log on to the character-based system.

2. To add a date to the list, do the following:

- Position the cursor on the date that follows the date to enter. For example, to insert a date between 01/01/04 and 5/24/04, position the cursor on 05/24/04.
- Press **Alt-Insert**.

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

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

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

## Area Code Updating Overview

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

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

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



## Changing Telephone Area Codes

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

### To change telephone area codes:

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

**Note:** To change multiple old area codes, use the **Multi Old AC** hot key. When you specify multiple area codes, \*Multi\* displays in the field.

4. In the **New Area Code** field, enter the new area code.
5. In the **State** field, enter the abbreviation of the state to which these area codes apply.
6. In the **Affected Exchanges** field, enter the three-digit exchanges for which to change the area code.

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

For each exchange, position the cursor on a blank line and type the three-digit number.

7. Use the **Begin** hot key to process the area code change.
8. To change the area code for other exchanges, repeat the previous steps.
  - Use the **Change New AC** hot key to change the value in the **New Area Code** field.
  - Use the **Clear Exchanges** hot key to clear the list of exchanges.
9. Press **Esc** to save the changes and exit the screen.

## Message Sounds Maintenance Overview

In User Maintenance you can assign a musical sound to alert the designated user of incoming messages, job queue entries, or the completion of spooler activity. You can supplement the standard sounds provided with the system by adding new .wav files containing other message sounds.

## Maintaining Message Sounds

Use the Message Sounds Maintenance to add and delete tunes to alert users to messages.

### To maintain message sounds:

1. From the **System > System Files > User Control** menu, select **Music Composer** to display the Message Sounds Maintenance window.
2. To add a sound, do the following:
  - From the **File** menu, select **Add Sound** to display the Save window.
  - In the **Save in** field, search your directories and select the .wav file to add as a new message sound.
  - Click the **Save** button to display the Message Sounds Maintenance prompt.
  - Change the name displayed in the **Enter name** field, if needed.
  - Click **OK** to add the name to the list on the Message Sounds Maintenance window.
3. To play a sound, do the following:
  - Position the cursor on the sound to play.
  - From the **File** menu, select **Play** to play the sound.
4. To delete a sound, do the following:
  - Position the cursor on the sound to delete.
  - From the **File** menu, select **Delete Sound**.
5. Save the changes and exit the window.



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