Eclipse Navigation

Release 8.6.6 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.6 (Eterm) Online Help System

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Table Of Contents

Navigation Overview

The topics in this area of the help system explain the basic features and functions for using Eclipse, such as:

- Logging in to Eclipse.
- Selecting items on menus to access screens.
- Using Keyboard shortcuts.
- Searching the system for customers, vendors, products, and transactions.
- Pushing a level and drilling down for more detail.

Logging into Eclipse

Your system password links you to your user profile, allowing you to access the screens needed for your job function. Many order entry features are controlled by the authorization assigned to your user password. Therefore, you do not have to enter an authorization code each time you access important files.

Your system administrator sets up your system login (user ID) and password. You can change your password at any time after the first password has been created.

You can also log on to another user's terminal using your user ID. This function is helpful when you are at a location other than your own terminal and need to enter or access data in the system, such as an item description for an order.

To log in to the system:

1. Launch Eclipse. The Login screen displays.
2. Enter your **User ID**.
3. Enter your **Password**.

   The Eclipse Password banner displays. This screen prompts for your password.
4. Enter your password again.

   Your password identifies you to the system, which then uses the information stored in your User Record to determine your access to menus, printers, and programs. It also determines your security and authorization levels.

To change your password:

1. From the **System** menu, select **Change Password** to display the Change Password screen.
2. In the **Enter Current Password** field, enter your current password.

   The Password Maintenance screen displays.
3. In the **Enter New Password** field, enter your new password.

   The Re-Verify Password screen displays.
4. Re-enter your password to verify the change.

   Note: You can also see your System Administrator to change your password.

To sign on as a new user:

1. From the **System** menu, select **New User**.
2. At the clock-out prompt, enter one of the following:
   - **Y** – Clocks the current user out of the system.
   - **N** – Logs the current user out of the system without clocking that user out.

3. If you have access to more than one account, select the account you want to log into in the Logon Accounts screen and press **Enter**.
4. In the **User Name** field, enter your user name.
5. In the **Password** field, enter your password.
6. Press Enter to complete the log in process.

See Also:

Navigation Overview

Keyboard Shortcut Details

Eclipse offers keyboard shortcuts for moving around in the system, for entering data, and, depending on where you are in the system, some keyboard shortcuts allow you to jump into specific windows related to your current task. The following table describes the keyboard shortcuts available in the system.

Note: Keystrokes that include the word "and" must be pressed at the same time.

Keystroke	Function
Alt and any hot key	Activates hot keys.
Alt and **Insert**	Inserts a blank line at your cursor.
Alt and **Delete**	Deletes the line at your cursor.
Alt and **Enter**	Toggles between a full screen size and the screen size defined in Eterm's **Configuration > Font** menu.
Alt and **~**	Displays G/L account postings from the body of a system transaction.
Enter	Moves from one field to another in a screen.
Esc	Exits the current screen and **saves** changes. If you want to exit a screen without saving changes, use **F12**.
Tab	Moves one field to the right.
Shift and **Tab**	Moves one field to the left.
Right Arrow	Moves one character to the right.
Left Arrow	Moves one character to the left.
Down Arrow	Moves down one line or field.
Up Arrow	Moves up one line or field.
Page Up	Moves to the previous page in a scrolling screen.
Page Down	Moves to the next page within a scrolling screen.
Backspace	Deletes one character to the left of the cursor.
Delete	Deletes one character to the right of the cursor.
Home	Moves to the beginning of the line.

Keystroke	Function
End	Moves to the end of the line.
Shift and **Home**	Moves to the top of the field, selection window, or paragraph the cursor is in.
Shift and **End**	Moves to the end of the field, selection window, or paragraph the cursor is in.
Alt and **F11**	Displays the Assigned User Defined Screens screen.
Alt and **F12**	Displays the User Defined Screens Assignment screen.
Alt and **Function Key**	Displays the User Defined screen matching the selected function key and currently displayed screen.
Ctrl and **R**	Recalls default values from the field you are in, but only before you advance to another field.
Ctrl and **F2**	Adds the current item to the Order Entry Clipboard.
Ctrl and **F3**	Adds all items on the current order generation to the Order Entry Clipboard.
Ctrl and **F4**	Shows items on the current order generation and selects the items to add to the clipboard.
Ctrl and **F5**	Displays the Order Entry Clipboard.
Ctrl and **F7**	Displays the Scheduler screen.
Ctrl and **F8**	Displays the Message screen.
Ctrl and **F9**	Displays the User Quick Access Lists screen.
Shift and **F1**	Displays the most recent report you created.
Shift and **F2**	Displays all hold entries that have not printed.
Shift and **F3**	Displays your User Job Queue.
Shift and **F4**	Creates a Job Queue for yourself or someone else, and creates an Activity Log for a vendor or customer.
Shift and **F5**	Displays the Unquality Event Tracking / Activity Based Costing Selections viewing screen. For more information see the following: • Viewing and downloading UET data. • Viewing ABC log entries.

Keystroke	Function
Shift and **F6**	Displays the UET / ABC Selections entry screen. For more information, see one of the following: • The Unquality Event Tracking Log Entry screen. • The ABC Log Entry screen.
Shift and **F7**	Displays the Image Indexing screen, which you use to attach documents to a screen.
Shift and **F8**	Displays an attached image.
Shift and **F10**	Displays the Tracker Stopwatch screen.
Shift and **F11**	Displays the Help Topics Maintenance screen in edit mode for the currently displayed screen. **Note:** You must have the Superuser authorization to use the **Shift-F11** key.
Shift and **F12**	Displays one of the following, depending on where you use this keystroke: • The Image Indexing screen from any system screen that has an Image Indicator (*i*). • The Print Barcode For screen to print a simple barcode label for a unique ID on an active screen.
F1 through **F8**	Displays access options assigned to main level menus.
F9	Displays field-specific help for the field the cursor is in.
F10	Displays a list of options for a validated field. If a field contains text and you press **F10**, the system does a match to the text already in the field. If you want to see everything available to enter in the field, press F10 from a blank field. **Note:** If you press **F10** in a branch/territory field that allows multiple branches, the **F10** list of the valid branches and territories displays. At the top the option **Multiple Branches' displays, which opens the multiple branch/territory window.
F11	Displays topic help related to the current screen in a browser window.
F12	Aborts from the current screen without saving changes.
C	In a numeric or date field only, clears the data currently in the field.
\	• In a date field, clears the data currently in the field. • In a numeric field only, clears the character the cursor is on and all characters to the right of the cursor.

Keystroke	Function
*	Calculator function for multiplication.
/	Calculator function for division.
-	Calculator function for subtraction.
+	Calculator function for addition.

See Also:

Menu Guidelines

Field Guidelines

Hot Key Guidelines

Menu Guidelines

The system's menu bar is at the top of the screen and has drop down menu options. Each of these options is displayed with a function key option and a text display of the menu contents, such as F3–Orders.

The function keys are across the top of your computer's keyboard. To activate any menu option, use the corresponding function key to display the drop-down menu. Each menu option has a highlighted letter used for keyboard selection. An ellipsis (**...**) next to a menu option indicates that selecting this option displays another menu with more options.

During system installation, the system administrator assigns menus to the function keys **F1-F7**. These menus are company-defined. Each company determines the menus users need to access from their terminals. For example, a user in the Accounting department may not need to access the Warehouse Management menu. Only menus appropriate for accounting appear on this user's terminal. Authorization keys determine a user's display.

The system administrator then creates and assigns these menus to each user. The function key **F8** is used to toggle between menus if the menus exceed the **F1-F7** assignments.

To select an item displayed on a menu:

1. Use the assigned function key to open the menu that you want to view.
2. With the menu displayed, do one of the following:
   - Use the keyboard letter for the mnemonic (highlighted or underlined) letter in the menu option.
   - Use the **Up** or **Down Arrow** keys to highlight the menu option and press **Enter**.
   - Use the mouse to click a menu item.

See Also:

Keyboard Shortcut Guidelines

Navigation Overview

Screen Guidelines

To use the system's screens, you need to understand the following functions:

- The system validates entries in some fields. Use the **F10** function key to display a list of valid options.
- Use hot keys to access other screens to perform related tasks. Hot keys are highlighted when they are available as an option and deactivated when not accessible for a particular transaction.
- Use function keys, which are the **F1** through **F12** keys, to:
  - Access selection lists of pre-defined data to populate fields.
  - Search for and recall values within screens.
  - Access record details.
  - Access other screens to find information and return to the current screen without losing information.

See Also:

Field Guidelines

Hot Key Guidelines

Using Select Screens

Locating the right items in a long, complex list can be a difficult task. However, you can enter your own search criteria on some system screens.

Access search screens from applicable system screens by using a **Find** or **Select** hot key. On the search screen, enter your search criteria. The system uses these criteria to search for matching items. It then displays all items which match the search criteria.

For example, you are searching for a certain kind of copper tubing in the product file. Access the search screen and enter **COP** as the word pattern to match on the search. The system searches for any matching items and returns products with **COP** in their description, such as copper tubing or copper elbow.

Similar screens are available throughout the system. Their titles and prompts may differ. For example, a similar screen may be titled **Find**, and have an additional prompt of **Select Source**.

To find or select items:

1. From any **Select** menu, use a **Find** or **Select** hot key to display a search screen.

   Note: This screen may be accessed from different menus throughout the system.

2. Enter your search criteria in the following fields:

Field	Description
Select Pattern/ Search String	Enter a string of characters to display entries that contain only those characters.
Select Line	Do one of the following to display entries for the price or buy line: • Enter a price or buy line. • Press **F10** and select a price or buy line.
Select User ID	Enter a user ID to display entries for that user.
Select Sec Level	Enter a security level to display entries assigned that security level.
Select Source	Enter a source, such as **phone,** to display entries associated with that origin.
Select Open Only	Enter **Y** to display entries that are currently open on the previous screen.
Select As Of Date	Enter a date to display the last item entered on or before this date.
Product Select Code	Enter a product select code to display products matching that code.

3. Press **Enter**.

   The system displays a list of all matching items.

4. Select the correct item or perform a new search.

See Also:

Common Screens Overview

Changing Views on Screens

Many screens throughout the system provide multiple views. Use a view choice to change the information that displays on a screen.

For example, the Warehouse In Process Status Queue has five different views. In one view, you can display the transactions pick count, status, and ship date. In another view, you can display the transaction open count, status, and ship date.

To change a view on a screen:

1. Use the **View** or **Change View** hot key, as applicable, to display the view choice list.
2. Select a view choice.
3. Press **Enter** to apply the selected view choice.

See Also:

Using Option Lists

Common Screens Overview

Additional Navigation Guidelines

This topic explains the following two features:

- Drilling down
- Pushing a level

Drilling Down

Drilling down is the ability to access additional information about a transaction. For example, you are reviewing the shipping status of a customer's order, and you need to see what items are on the order. You can use the **View** or **Edit** hot keys to view the original transaction or additional information.

Pushing a Level

When you are *pushing a level* you suspend the current task and begin another. For example, you are waiting for a customer to complete their order. Another customer needs an inventory check. You can suspend the current order to check the inventory.

To push a level:

1. Select an option from the menu.
2. Perform the new task.
3. Press **Esc** until you close the new task and return to the screen where you were working the original task.

Common Screens

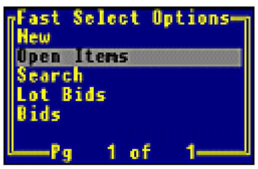
Common screens, such as such as selection lists or warning prompts, are used throughout the system, such as selection lists or warning prompts. The content of these screens change depending on their context. Because of this variety, specific help is not available for common screens.

To view specific help for screens from which you accessed the common screen, close the common screen — you can close system screens by pressing **F12** — and press **F11** from the previous screen.

Use this document to view *general* information about the following types of common screens.

Option Lists

Use option list screens to display and select options for a field.



Selection Lists

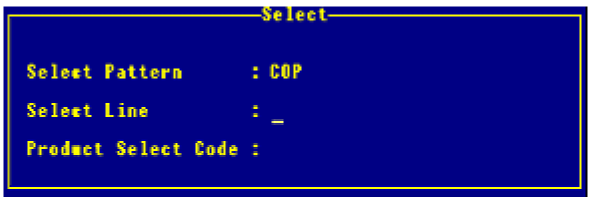
Use selection list screens to create or recall lists.

Multiple Branch and Territory Selection Screen

Use Multiple Br/Tr Selection screens to set up access to branches or territories.

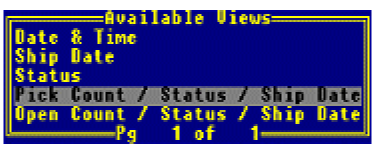
Select Screens

Use select screens to enter criteria to find transactions or records.



View Choices

Use Available Views screens to select different screen views.

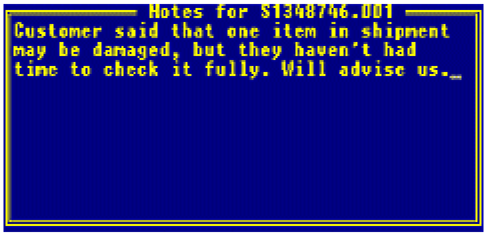


Date Lists

Use date list screens to select dates, such as effective or shipping dates.

Comments and Notes

Use comments and notes screens to add remarks to a transaction or record.



Alerts, Prompts, and Warning Messages

Alerts, prompts, and warning messages display messages confirming, reminding you of, or alerting you to your actions.

See Also:

Navigation Overview

Alerts, Prompts, and Warning Messages Guidelines

Alerts, prompts, and warning messages display throughout the system. In many cases, they are just reminders that prompt you to confirm an action before proceeding. At other times, they alert you that continuing with your action is unadvised or restricted. Most alerts, prompts, and warning messages are self-explanatory.

For example, the prompt below stops you from inadvertently closing a screen without saving your changes. Like many prompts, this one requires just a **Y** or **N** entry.

Depending on your user settings, authorization levels, and workflow, you can proceed past some alerts, prompts, and warning messages. In other cases, you may be required to enter a password to proceed. Whenever you need additional authorization or help, ask your supervisor.

See Also:

Common Screens Overview

Hot Key Guidelines

Hot keys provide easy access to additional functionality. They are located at the bottom of the screen with highlighted letters, called mnemonic keys.

To use a hot key, press and hold the **Alt** key and type the highlighted letter of the hot key.

The following hot keys are common across many screens.

Hot Key	Function
Move	Repositions an item in the displayed list. 1. Position the cursor on the item you want to move 2. Use the **Move** hot key. 3. Position the cursor on the line you want the selected item to follow. 4. Press **Enter** to complete the move.
Clear All	Displays a **Clear List (Y/N)** prompt to clear the displayed list from the screen. If you clear a previously saved list, the list is cleared from the screen but not deleted from the system.
Save	Displays a **Save Work ID** prompt to save the displayed list under a unique Work ID (maximum of 15 characters). • If you create a new list, press **Enter** before pressing **Esc.** • If you are editing a list, you can update the existing Work ID by pressing **Enter** or save the revised list under a new Work ID by changing the ID and then pressing **Enter**. • Once a Work ID is saved, you cannot delete it. To delete items included under a Work ID, select an item and use the **Space Bar**, the **Backslash** key (\), or the **Delete** key as necessary.
Recall	Displays the **Recall List** prompt to display a list saved under a unique Work ID. • If only one Work ID exists, the list associated with that work ID displays. • If multiple Work IDs exist, a Recall Work ID selection list displays from which to select. You can also press **F10** at the prompt to display a list of available Work IDs.
Delete	Deletes the selected item on the screen. The system prompts you to confirm the deletion.
Select	See Using Select Hot Keys.
Multi	See Using Multiple Values Hot Keys.

See Also:

Screen Guidelines

Searching and Selecting Data

Field Guidelines

Using Quick Access Lists

Additional Navigation Guidelines

Using Select Hot Keys

Use the **Select** hot key, or variations of this key, to display the Search Criteria screen. Use this screen to enter search criteria for additional data related to a field or screen.

To set up search criteria:

1. Use the **Select** hot key to access the Search Criteria screen.
2. In the **Select Pattern** field, enter a string of characters to display those entries that contain those characters in the first two lines of the comment field, for example you may be searching for a specific product. Enter the product name.
3. In the **Select User ID** field, enter a User ID to display only those entries that were entered by that ID. Press **F10** to display a list of User IDs.
4. In the **Select Sec Level** field, enter a security level to display only those entries with that security level on the screen.
5. In the **Select Source** field, enter a source to display only those entries identified with that source on the screens. Press **F10** to display a list of sources.
6. In the **Select Open Only** field, type **Y** to display only those entries that are currently open on the screen. Enter **N** to display all entries. The default is **N**.

See Also:

Screen Guidelines

Field Guidelines

Hot Key Guidelines

Using Multiple Values Hot Keys

When a field on a screen can contain multiple values, a **Multiple Values** (or variations of this, such as Multi) hot key is active on the screen. This hot key displays the Multiple Selection screen, where you can enter multiple values for the field. When multiple values are entered for a field, *Multi* displays in the field.

> **Note:** If you press **F10** in a branch/territory field that allows multiple branches, the **F10** list of the valid branches and territories displays. The option ****Multiple Branches**** also displays, which opens the multiple branch/territory window.

The Multiple Selection screen may be named differently throughout the system, but it functions the same.

To use a multiple value hot key:

1. Position the cursor on a field in a screen for which a **Multiple Values** (or variations of) hot key is active and use the hot key to display the Multiple Selection screen for that field.
2. To recall a previously saved list of values, use the **Recall** hot key. At the **Recall Work ID** prompt, enter the ID or press **F10** and select one from a list.
3. Create or edit the displayed list of values in any of the following ways:
   - To add an item to the list, position the cursor on a blank line, press **F10** to display a list of values and select one, or type the value.
   - To delete an item from the list, position the cursor on the item and press **Alt-Delete.**
   - To clear an entire list of values, use the **Clear List** hot key.
4. To save the list of values for later recall, use the **Save** hot key. At the **Save Work ID** prompt, enter an ID.

   Note: You can change the contents of a Work ID, but you cannot delete a Work ID.
5. Press **Esc** to apply the list to the field and to return to the previous screen.

   Multi displays in the field.

See Also:

Hot Key Guidelines

Field Guidelines

Screen Guidelines

Field Rules and Details

When working in screens you are either entering or viewing information. When entering information, some fields are validated, meaning that there are stored values associated with that field that you can select, or that populate as you type in the field.

To enter information in a validated field do one of the following:

- Place the cursor in the field and press **F10** to display a list of entries.
- To reduce the selection list, place the cursor in the field and enter part of the field value. Press **F10** to display only items containing the search string.

Special Function Fields

The system also has special function fields that you can use to enter and edit data. For example, two such fields are calculator and date fields.

Special Field	Function
Calculator Field	Built into most numeric-only fields. Use the numeric keypad on the keyboard to enter numbers and operators (**+, -, *, /**) like a calculator, and the system produces the result and enters it into the field. For example: • Typing **125*26** in a numeric field displays **3250** (125 multiplied by 26). • Typing ***26** in a numeric field multiples the currently displayed value by 26 and then displays the result. Use the **Enter** key as the **=** button on a calculator. Also, type **C** (clear) in a numeric field to clear the data from a field.
Date Field	When entering dates: • If the month and day are in the current year, enter month and day digits only. It is not necessary to enter the digits for the year. • To clear a date field, type a backslash (\) in the field. • Press **F10** to display the Eclipse pop-up calendar to select a date to enter.

Full Screen Editing

While still entering original information on a screen, you can edit entries in fields.

For example, while entering a sales order, if you change a product, the new description and price automatically updates for that product in real time.

> **Note:** You must still be entering the original information into a screen to use full screen editing. If you are editing information on a screen that has already been processed, you must be in edit mode.

Branch and Territory Field Guidelines

Throughout the system, branch and territory fields have a variety of purposes, depending on where you are in the system. There are also different ways of populating these fields, based on the types of results you would like to see.

In any branch or territory field, you can do any of the following:

To search, query, or report on...	Do the following...
only one branch	enter the name or number that represents that branch.
multiple branches	Do either of the following: • enter the names or numbers that represent those branches, separated by commas without spaces. For example, enter 1,2,3. • press **F10** to display the multiple selection screen and then select ****Multiple Branches****. In the **Br/Terr** column, enter the branches you want to include and then press **Esc**.
only one territory	enter the name or number that represents that territory.
multiple territories	press **F10** to display the multiple selection screen and then select ****Multiple Branches****. In the **Br/Terr** column, enter the territories you want to include and then press **Esc**.
all branches and territories	type **All**.

Using Quick Access Lists

Quick Access Lists hold the records you have most recently accessed to provide quick search and entry. Some of the areas that have Quick Access Lists available are:

- Sales Orders
- Purchase Orders
- Transfer Orders
- Cash Receipts
- Trackers
- Customers
- Vendors
- Products

For example, you are in the Cash Receipts screen applying money owed towards a bill for a customer. In the **Customer** field, you can press **F10** to select from a list of customers you have previously entered in the Cash Receipts screen. Select the customer from the Quick Access List to quickly enter the customer's information and select the transaction to which to apply the money.

You might also use this function to find out what items are on an order for a customer. In the Sales Order Entry screen, you can enter the customer's name to display a Quick Access List of all sales order numbers for the customer. This list allows you to quickly find and select the order you want to view.

Set the number of records displayed in a Quick Access List in the Number of Records to Save in User Quick Access List control maintenance record.

The format of all Quick Access List screens is the same regardless of the record type for which it is displayed.

To access the last record viewed in an area of the system, for example in Customer Maintenance to access the last customer record you viewed, type two periods (**..**) and press **Enter**. The system displays the last record you selected. This functionality works in all areas that also have a Quick Access List.

To use a Quick Access List:

1. Do one of the following to display the User Quick Access List screen:
   - Press **Ctrl-F9** from anywhere within the system and select the type of list to display.
   - Press **F10** from a field that permits searches for entity, general ledger, product, or tracker records.

If you press **F10** in a branch/territory field that allows multiple branches, the **F10** list of the valid branches and territories displays. The option ****Multiple Branches**** also displays, which opens the multiple branch/territory window.

The Quick Access List contains:

- The first column of the Quick Access List displays the record type, except for trackers. For trackers it displays the tracker ID number.
- The second column of the Quick Access List displays a description of the data record such as the entity name for orders, customers, vendors, or cash receipts; the first line of the original comment for a tracker.
- The third column displays the Eclipse Internal ID of the data record, except for trackers. For trackers the column displays the name of the customer, vendor, or user to whom the tracker is assigned.

2. Select the item that you want entered in the field by positioning the cursor on the item and pressing **Enter**.
3. Use any of the following hot keys, as needed:

To...	Use this hot key...
display the selected data record in view-only mode	**View**
display the selected data record in edit mode (where applicable)	**Edit**
display a different Quick Access List	**Select** The currently selected list's name is displayed next to the hot key name.
include or exclude canceled orders (when orders are displayed)	**Canceled Orders** The hot key functions as a toggle. The currently selected option is displayed next to the hot key name.

See Also

Field Guidelines

Using Variable Dating

Variable dating is integrated into many of the system's date fields. Use it to substitute variables for normal month, day, and year numbers. With variable dating, the current date is represented as **MO/DA/YR**.

By using variables in a date field, you can schedule static data applications, such as reports, to run on a regular basis. For example, when scheduling a report to run monthly using a date range from the first of the month to the end of the month, you would enter **MO/01/YR** for the starting date and **MO/31/YR** for the ending date.

To use variable dating, select from the following options:

Month Segment	Day Segment	Year Segment
• **MO** for the current month. • **FB** for the Fiscal (Year) Beginning month. This month is defined in control file maintenance. • **FE** for the Fiscal (Year) Ending month. The system calculates this is 12 months after the fiscal year beginning month.	• **DA** for the current day. • **FB** for the Fiscal (Month) Beginning day. The first calendar day following the previous month's End of Month (EOM) day. • **FE** for the Fiscal (Month) Ending day . Each month's EOM day is defined in a Control File Maintenance record.	• **YR** for the current year.
• **-1** to **-9** for one to nine months/days/years in the past. • **-A** to **-Z** for 10 to 36 months/days/years in the past. • **+1** to **+9** for one to nine months/days/years in the future. • **+A** to **+Z** for 10 to 36 months/days/years in the future.		

Also use Variable Dating to substitute a fixed value for any portion of the **MO/DA/YR** variable. For example:

To run a report...	Enter...
Starting on the first day of the previous month of the current year through the last day of the current month of the current year	1. **-1/01/YR** for the **Start Date**. 2. **MO/31/YR** for the **End Date**.
For a ten day period centered on today	1. **MO/-5/YR** for the **Start Date** (the current date minus five days). 2. **MO/+5/YR** for the **End Date** (the current date plus five days).
For a fiscal year	1. If your company's fiscal year beginning month is July, June's End of Month day is the 30th, **FB/FB/95** for the **Start Date**. 2. **FE/FE/96** for the **End Date**.

<table>
<tr><th>To run a report...</th><th>Enter...</th></tr>
<tr><td>
• Daily
• Weekly
• Monthly
• For the month-to-date
</td><td>
1. Enter one of the following for the Start Date:
• MO/DA/YR - daily
• MO/-6/YR - weekly
• MO/FB/YR - monthly
• MO/01/YR - month-to-date
2. For the End Date, MO/DA/YR, except for monthly reports: enter .MO/FE/YR
3. Use the Opts hot key.
4. Select Scheduling.
5. Enter a time (for example, 10 P.M.) under Start Time.
6. For daily reports and month-to-date reports, press Enter to use the present date as the Start Date.
7. For weekly and monthly reports, the date for the coming Saturday as the Start Date or the month end date as the Start Date respectively.
8. An asterisk (*) by Daily to have it run daily for daily and month-to-date reports; an (*) by Weekly or by Monthly to have it run weekly or monthly, respectively.
9. Press Esc.
</td></tr>
</table>

Note: To set up repeated runs of a report, use the Phantom Scheduler.

See Also:

Field Guidelines

Phantom Processing Overview

Selecting Dates from Date Lists

There are two types of date lists in the system:

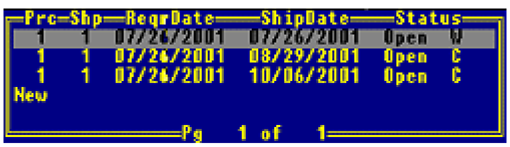
- Shipping/Receiving dates.
- Effective dates.

Use these date lists to view information for transactions or other records as of the selected date. For information on using the calendar function, see Using Pop-Up Calendars.

Selecting a Shipping/Receiving Date

Select a shipping or receiving date to display an order generation and its detail for that date. For more information, see Changing and Creating Shipping Dates.

In the shipping date list below, the screen provides summary information about each ship date generation for a transaction. It shows the pricing and shipping branches, required dates and ship dates, and each order generation's status. From this list, select the transaction's ship date generation that you want to view in further detail.



To select a shipping/receiving date:

1. Use a ship dates hot key to display a list of ship date generations for a transaction.

   A shipping date list may display automatically from certain fields.
2. Select a date from the list.
3. Press **Enter** to view the ship date generation.

Selecting an Effective Date

Select an effective date to display a record's information for that date. For example, in Product Price Sheet Maintenance, you want to compare last year's prices with this year's prices for a group of products. Select the last year's price sheet from the effective date list.

To select an effective date:

1. Use an effective dates hot key to display an effective date list.

   An effective date list may display automatically from certain fields.
2. Select a date from the list.
3. Press **Enter** to view the record for the selected effective date.

Adding Comments or Notes

Use comment and note screens to enter reminders or to explain a transaction. On some comment and note screens, you can select from a list of pre-defined remarks. On others, you must enter your own remark.

Usually, you access a comment or note screen by using a hot key. Certain fields display comment or note screens automatically. For example:

- After changing a customer record, a comment or note screen may appear prompting you to enter a reason for the change. Enter concise remarks that explain the change to coworkers.
- When entering an order, a comment or note screen may appear prompting you to enter delivery instructions. Enter shipping instructions to alert delivery people to special delivery times or locations.

When you enter remarks on comment or note screens, keep in mind the following:

- Comments can display on printed forms, such as acknowledgements, pick tickets, and invoices. For example, use comments for special information you want your customer to see.
- Internal notes do not display on printed forms. For example, use internal notes to share additional transaction information among your coworkers.
- An asterisk (*****) indicates that remarks are attached to a transaction or record. Display the remarks by using the same hot key you used to create the remarks.

To add comments and notes:

1. Use a comments or notes hot key to display the comment or note screen.

   A comment or note screen may display automatically from certain fields.
2. Type your remarks.
3. Press **Esc** to save your comments or notes.

See Also:

Common Screens Overview

Adding Notes and Instructions to Purchase Orders

Entering Internal Notes and Vendor Instructions

Entering User-Defined Notes

System Searches Overview

Searching the system is referred to as *index searching*, because the system searches for characters that are assigned as index terms in the various system files. For example, when a new customer is set up in the system, a customer name is entered, as well as index terms that are used to locate the customer later. These user-entered index terms typically include all or part of the customer name, phone number, and zip code, as well as other characters that your company wants to use.

Index searching is used to find products, customers, vendors, and transactions. When searching, enter as much information as possible to get the best results. For example, if you enter exact criteria that only exists in one file, that file opens upon executing the search. However, if you enter only one or two words that appear in many places, the system can return a long list of possible matches.

Types of Searches

You can search the system in two ways:

- Using words and numbers.
- Using special characters in conjunction with alphanumeric characters.

Use any of the following ways to search with words and numbers:

- Use only alphanumeric characters (A-Z, 0-9) in your searches. The system ignores all special characters, unless a non-alphanumeric character has a special search function, as mentioned below. For example, searching for **12** returns matches on **12** and on **1/2**.
- Use either upper or lowercase letters. The system converts lowercase letters into uppercase letters for search purposes. For example, searching for **microamp** returns matches for **MicroAmp** and **MicroAmprobe**.
- Use a space between words in a search. The search program looks for matches between the characters you type, separated by spaces, and the first characters of the indexed search words.

Use the following special characters in all searches throughout the system:

If...	Then the system...
a period (.) precedes *numeric* search criteria	searches for the record ID. For example, in Customer Maintenance, **.1234** returns that customer ID.
search criteria is followed by a period	searches for an exact word match. For example, **elec.** would return **ELEC** but not **ELECTRIC**.
search criteria is followed by a forward slash (/)	searches for an exact match anywhere in the word. For example, **opp/** would return **COPPER** or **STOPPER**.

Note: Other special characters are used in specific types of searches, as described in Searching for Customers or Vendors, Searching for Products, and Searching for Transactions.

Additional Search Tips

When conducting system searches, note the following:

- If the system does not find a match, it prompts you to re-enter your search criteria. Press the **Spacebar** to clear the field and repeat your search with different criteria.
- If the system finds one match based on your search criteria, it displays it in the field from which you began the search. If the selected item is not the one you want, re-position the cursor in the field, press the **Spacebar** to clear the field, and repeat your search with different criteria.
- If the system finds more than one match based on your search criteria, it displays a list of the matches. Navigate to the desired match and press **Enter** to select the match. If none of the displayed items are the one you want, press **F12** to exit the list.
- If the system displays a long list of matches, press **F9** to display the Additional Search Criteria screen. Append new words or characters to your search criteria and press **Enter**. The system restarts the search from the beginning.

See Also:

Searching for Customers or Vendors

Searching for Products

Searching for Transactions

Searching for Invoices in A/P Entry

Using Last Search and Document Recall

Searching for Customers or Vendors

You can search for customers and vendors in various places throughout the system, such as:

- Customer Maintenance
- Vendor Maintenance
- Sales Order Entry
- Purchase Order Entry

The system uses the same search method to find customers and vendors as it does to find products and transactions.

To search for a customer or vendor:

1. Do one of the following:
   - Enter keywords or special characters.
   - Enter telephone numbers or zip codes, as described in the table below.

If you enter...	Then the system displays the...
a 10-digit telephone number	customer or vendor matching the telephone number.
the last four digits of a telephone number	customers or vendors whose telephone numbers end in those four digits and whose zip code begins with those four digits.
a five-digit zip code	customers or vendors whose zip code matches the search criteria.

2. Press **Enter**.

   The system compares your search criteria to the values in the **Name** and **Index** fields on the Customer Maintenance or Vendor Maintenance screens and displays the matching results.

See Also:

System Searches Overview

Searching for Products

Searching for Transactions

Using Last Search and Document Recall

Searching for Products

You can search for products in various places throughout the system, such as Sales Order Entry and Purchase Order Entry. The system uses the same search criteria to find products as it does to find customers, vendors, and transactions. However, product searches offer additional options that allow you to get quicker, more narrowly defined search results.

To search for a product:

1. In a product entry field, enter keywords or special characters and press **Enter**.

   When searching for products, the system compares your search criteria to values in the **Product Description**, **Additional Key Words**, and **UPC** fields on the Product Maintenance screen.

   - You can enter a product by preceding the Product ID with a period. For example, when you enter **.1234**, the system returns the product with the ID 1234.
   - Use the following special characters when searching for products:

If...	Then the system...
a forward slash (/) precedes the search criteria	searches for a product family or price line. For example, **/delta** returns a list of products in the DELTA family or DELTA Price Line.
two forward slashes (//) precede the search criteria	searches for a match on a buy line. For example, **//SYL** returns a list of products in the SYLVANIA Buy Line.
a forward slash (/) is entered as the search criteria	displays a list of product families and price lines.
a forward slash and a period (/**.**) precede the search criteria	searches for a match on products purchased in the last year by the selected ship-to customer.
a forward slash and a comma (/**,**) precede the search criteria	searches for a match on products purchased in the last year by all ship-to customers associated with the selected bill-to customer.
a forward slash and a semicolon (/;) precede the search criteria	searches for a match on products for which contract prices are in effect for the selected customer.

2. Expand your search, if necessary, by pressing **F10** to move to one of the product indexes listed below. The system searches for the following groups of products in the order listed:

   - **Active Products –** The system first searches for products in this category. These products have been previously sold or purchased at your location, or they are physically on-hand. Your company can set how it wants to search for active products using the Display Active Primary Index Products First In Product Search control maintenance record.

- **Primary Index –** Your company or branch assigns products this status. These products are items you plan to routinely sell or search for.
- **Catalog Index –** Your company or branch assigns products this status. These products, often non-stocks, are items you do not routinely sell or search for, but are able to order.
- **PDW Catalog Index** - Products in this group include every item sold or manufactured by the suppliers you specify. You must purchase the Product Data Warehouse (PDW) companion product to search the PDW Catalog Index.

See Also:

System Searches Overview

Searching for Customers or Vendors

Searching for Transactions

Using Last Search and Document Recall

Searching for Invoices in A/P Entry

As you are reconciling invoices and posting payables, you can search for a specific invoice directly in A/P Entry.

To search for an invoice in A/P Entry:

1. From the **A/P** menu, select **A/P Entry** to display the A/P Entry screen.
2. In the Invoice # field, enter all or a portion of the invoice you are trying to find, using the following additional search parameters:

If...	The system...
a pound sign (#) precedes the search criteria	searches for invoice numbers that start with the number you enter
a pound sign (#) precedes the search criteria, and a forward slash (/) follows the criteria	searches all invoices that have the number you enter anywhere in the invoice number
a pound sign (#) precedes the search criteria, and a period (.) follows the criteria	searches for an exact match to the search criteria

4. Click **OK** to search for the invoices that match your search criteria.

Searching for Transactions

You can search for transactions throughout the system, for example, in Sales Order Entry or Purchase Order Entry. The system uses the same search method to find transactions as it does to find customers, vendors, and products.

To search for a transaction:

1. Enter the transaction number in an appropriate search field, such as the **Ship To** field of a blank order.

   Transactions have the following prefixes:

Transaction	Prefix	Example
Sales Orders	**S**	**S1234567**
Purchase Orders	**P**	**P1234567**
Transfer Orders	**T**	**T1234567**
Rental Orders	**R**	**R1234567**
Adjustments	**A**	**A1234567**
Disbursements	**D**	**D1234567**
Payables	**Y**	**Y1234567**
Cash Receipts	**C**	**C1234567**
Journal Entries	**J**	**J1234567**

   If you do not know the transaction number, search for the customer first, and then search for an order.

See Also:

System Searches Overview

Searching for Customers or Vendors

Searching for Products

Using Last Search and Document Recall

Using Last Search and Document Recall

Last search and document recall are two ways that you can eliminate the need to start a search from the beginning if you make a mistake and quickly open the last document you saved or closed.

Last Search Function

The system's last search function eliminates the need to start a search from the beginning if you select the wrong option from a search list. The last search function is available in many system applications. Use it in fields that require specific information such as customer or vendor names, product descriptions, and so on.

Note: The last search function is not available in system reports.

To use the last search function:

1. Conduct a search for a customer or vendor, product, or transaction.
2. If you need to redo the search, enter a period (**.**) in the field you searched in and press **Enter**.

   For example, while entering a customer name in Customer Maintenance, you type part of the customer name in the **Customer/New** field. The system displays a list of matches. After scrolling through the list, you find the name but select the wrong one. To correct the error, press **Esc** to start over. Instead of searching again, enter **"."** in the **Customer/New** field and press **Enter**. The system displays the search list again, highlighting the last name you selected. This allows you to select the correct name without having to search again from the beginning.

Recall Document Function

The recall document function allows you to quickly open the last system document that you saved or aborted. The recall document function is available in many transaction documents and maintenance files, such as sales orders, purchase orders, transfers, customer files, and vendor files.

To recall a document:

1. Enter two periods (**..**) in the field and press and press Enter. The last document open on the screen displays.

   For example, after entering a sales order, you realize that you didn't charge freight. Instead of having to search for the order number to open it again, enter the branch number in the **PrcBr** field. Next, enter **".."** in the **Ship-to** field and press **Enter**. The order appears on the screen, allowing you to make the necessary corrections.

Using Option Lists

Option lists are common screens, which may or may not have a title. Use these lists to select from pre-defined options. For example, press **F10** in many fields to display valid choices. On some screens, use a hot key to display the screen's sorting options.

Some option lists display automatically; others require a key press or hot key. Sometimes selecting a list option displays an additional list. For example, selecting **Open Items** in the option list below displays a list of open orders from which to select.

There are many types of option lists. Date lists and view choices are two such examples.

To use an option list:

1. Use **F10** or a hot key to display the list, as appropriate.

   An option list may display automatically.
2. Select an option in the list.
3. Press **Enter** to apply the selection.

See Also:

Changing Views on Screens

Selecting Dates From Date Lists

Using Selection Lists

Common Screens Overview

Using Selection Lists

Use selection lists to create, save, and recall a list of parameters, which can then be entered into a field or report. For example, create and save a list of user IDs on which to run a monthly report for each employee's warehouse productivity.

Use hot keys to access selection lists. The hot key and list name vary, depending on the type of list you are creating and from where you are accessing the list. For example, you are running a report for price lines. The hot key you use to access the selection list is named **Price Line**. The selection list you access is named Price Line Selection.

When you access a selection list, it can display empty or with a list of items. For example, the screen may list all price lines. In this case, you can modify the list either by deleting the items you do not want or by clearing the entire list and building a new list. You can also use the list as is.

If you create a list, save it with a unique work ID so you can recall it for later use.

To create or edit a selection list:

1. With your cursor in a field that supports multiple selections, use the hot key that opens the selection screen.
2. Perform the following, as needed:

To...	Do this...
create a new selection list	For each line, enter a value or press **F10** to select an item. To insert a blank line, place the cursor on the line where you want to insert the blank line and press **Alt-Insert**.
delete single items from a selection list	Place the cursor on the item you want to delete, and press **Alt-Delete**.
clear all items from a selection list	• Use the **Clear** hot key. At the prompt, confirm the deletion.
move a single item in a selection list	• Place the cursor on the item you want to move. • Use the **Move** hot key. • Place the cursor on the line to which you want to move the item. • Press **Enter**. The system places the item on the selected line and moves all other items down one line.
rearrange a selection list	Use the **Sort** hot key and select a sorting option.
recall the original selection list	Use the **Clear** hot key, followed by the **Recall All** hot key. The system deletes the modified list and displays the original list.

3. Use the **Save** hot key to save all updates to the selection list.
4. At the **Enter Work ID** prompt, enter an ID for the saved list.
5. Press **Esc** to return to the previous screen.

The system displays ***Multi*** in the field from where you accessed the selection list, indicating that the items on the selection list are values in the field.

To recall a list:

1. With your cursor in a field that supports multiple selections, use the hot key that opens the selection screen.
2. Use the **Recall** hot key.
3. At the **Recall Work ID** prompt, do one of the following to display a work ID:
   - Enter the work ID.
   - Press **F10** and select one from the displayed list.

   The system displays the selection list on the screen.
4. Press **Esc** to return to the previous screen.

   The system displays ***Multi*** in the field from where you accessed the selection list, indicating that all items on the selection list are values in the field.

Creating a Selection List from a TCL Save-List

On some selection list screens, you can create a selection list from a Terminal Control Language (TCL) save-list.

For example, you import pricing data into a TCL save-list in order to apply that information to a product report. To apply the data, set up the report. From the report, access the selection list screen. On the selection list screen, recall the TCL save-list to create the new selection list. Once the new list is complete, apply it to the report.

To create a selection list from a TCL save-list:

1. With your cursor in a field that supports multiple selections, use the hot key that opens the selection screen.
2. Use the **Recall** hot key to display the **Recall Work ID** prompt.
3. At the prompt, enter **get-list** to display the **Enter Saved List** prompt.

   Note: Not all selection lists support this functionality. If the system does not prompt you with **Enter Saved List**, you cannot create a selection list from a TCL save-list on this screen.
4. At the prompt, enter the name of the TCL save-list from which you want to create the selection list.

   The system displays the list on the selection screen.
5. Edit the list, as needed.
6. Save the list.
7. Press **Esc** to return to the previous screen

The system displays ***Multi*** in the field from where you accessed the selection list, indicating that all items on the selection list are values in the field.

See Also:

Using Option Lists

Common Screens Overview

Viewing the Clock and Calendar

When you need to view the time and date from your terminal for general purposes, use the Clock/Calendar screen. This screen displays the current month and next month, the current date, the time, and your user ID port and terminal information. This screen is view-only.

To view the Clock/Calendar screen:

1. From the **System** menu, select **Clock/Calendar** to display the Clock/Calendar screen.

   View the following information:

Field	Description
Port	Port ID of the terminal to which you are connected.
User	User ID of the person currently connected to Eclipse.
Account	Next to the user ID is the Eclipse account to which the terminal is connected.
Time	Next to the account is the current time in the time zone assigned to the displayed user ID. The time counts as you view it, ensuring real-time accuracy.
Term ID#	ID assigned to the terminal.
Term Version	Version of Eterm installed on the terminal.
Calendars	• Dates highlighted in yellow are the assigned days off for the displayed user ID. • The date highlighted in red is the current date.

3. Use the **Arrow Keys** on your keyboard to move the screen to previous or following months.
4. Press **Esc** to exit the screen.

See Also:

Using Pop-Up Calendars

Using Pop-Up Calendars

When the cursor is positioned in a date field, use the **F10** function key to display a calendar of the current month. Use this calendar to select a date to enter into a date field.

To use the pop-up calendar:

1. Position your cursor in a date field.
2. Press **F10** to display the pop-up calendar.

   The system displays a calendar of the current month with the current day highlighted in red.

   - To view the previous month, press the **Page Up** button.
   - To view the next month, press the **Page Down** button.
3. Position the cursor on the date you want to select and press **Enter** to select the date.

   The system enters the date in the date field on the screen from which you accessed the calendar.

See Also:

Viewing the Clock and Calendar

Index

