

System Management

Menu Management and Security

Breeze Menu Management and Security System performs all the critical system management functions relating to your Freedom Series/ec21 applications. This includes dynamic navigation facilities such as hot keying from one screen to another, personalized menu creation and multi-level security and password protection.

MENU MANAGEMENT

Breeze gives you the ability to build any number of menus over applications on your system. These menus may be nested any number of levels deep. Freedom Series/ec21 is delivered with a set of Breeze menus that give you access to every Freedom Series/ec21 application and program. Using Breeze, you can customize the menus, add additional menus for applications that are not part of Freedom Series/ec21, and build Personal Menus for individual users.

DEFINING A MENU

Defining a Breeze menu begins with your assignment of a numeric identifier that can be up to five digits in length. For each menu, you enter a one or two line heading, and each heading line can be up to 80 characters. A third line of heading, called the Message Line, can also be defined. The Message Line can be defined individually for each menu or you can cause the same Message Line to appear on all menus. Once you have identified a menu and entered a heading, you proceed to define and assign menu selections to the menu.

DEFINING A MENU SELECTION

To define a Freedom Series/ec21 menu selection, you assign a numeric identifier to the selection that can be up to five digits in length, assign the selection to a menu, and enter the description of the menu selection that will appear on the menu. Breeze will prompt you to then enter the command(s) that will be executed each time the menu selection is chosen. The command(s) associated with a menu selection usually cause the execution of an application program, but can be used to execute any iSeries command, allowing you to easily incorporate calls to programs that are not part of Freedom Series/ec21. You could, for example, add menu options to access a Payroll or Fixed Asset system. When defining a menu selection, Breeze presents you with the opportunity to add security to the selection by password, user, or device.

Personal Menus

Breeze gives you the ability to build Personal Menus for individual users or group of users. Building a Personal Menu is very simple. You enter the user's or group user's profile name and then just check off the menu selections that should appear on the Personal Menu from a list of all menu selections that have been defined in Breeze. When the user invokes Breeze, the user's Personal Menu is displayed instead of the Breeze Main Menu. You can always return to the main menu if you wish. Personal Menus are very useful and quick for busy executives who use a given set of selections frequently.

The Good Morning Screen

The Breeze Good Morning Screen, if defined, appears before the Breeze Main Menu or a Personal Menu is displayed when Breeze is invoked. The Good Morning Screen can be defined and changed as often as you wish. The Good Morning Screen is a blank pallet, full screen in size, on which you can enter any message, comment or greeting and makes a good company bulletin board.

Using the Menus

When setting up users on your iSeries, you are given the opportunity to indicate commands that should be executed each time the user signs on to the iSeries. For most of your users you will indicate that Breeze should be invoked when the user signs on. This means that each time the user signs on, the user will be presented with the Breeze Main Menu or the user's Personal Menu.

Point and Shoot

To navigate among Breeze menus or to execute a menu selection, you can enter the Breeze selection number on the command line and press enter or you can position the cursor on the display line on which the menu selection and description appear and press enter. If you access your iSeries from your PC, you will be able to use your mouse to point and shoot to execute menu selections.

The Breeze Hot Key

From any Breeze menu or from within any application, you can press the Breeze Hot Key to move to another Breeze menu selection. When the Breeze Hot Key is pressed, a window is displayed and you can

enter the number of another Breeze menu selection you want to execute. Breeze suspends your current activity and immediately executes the menu selection you have entered. When you exit the application you executed using the Breeze Hot Key, you are immediately placed back in the suspended function exactly where you left off.

SECURITY

Breeze allows you to add security to a menu selection when you define the selection. You can also add security to a menu selection any time after it has been defined. Breeze security can be of three types and all three can be used together to secure a menu selection.

Password

A menu selection can be secured by password. Whenever a menu selection secured by password is chosen, the user is prompted to enter the password and access is only granted if the correct password is entered. To facilitate maintaining security by password, Breeze provides a function to change a common password across all menu selections secured with the common password at one time. For example, if you have several menu selections secured by the password buick, you can tell Breeze that buick is to be replaced by ford and all menu selections previously secured by buick would be changed to be secured by ford.

Device

Each device, terminal or PC, attached to the iSeries is assigned a Device ID. Breeze menu selections can be secured by Device ID. Access to the menu selection is granted by Breeze only if the Device ID appears on a lists of Device ID's you build for the menu selection.

User

To sign on to your iSeries, you must enter a User ID. Breeze menu selections can be secured by User ID. Access to a menu selection is granted by Breeze only if the User ID appears on a lists of User ID's you build for the menu selection.

Signon Command Maintenance

When Breeze is invoked, you are normally presented first with the Good Morning Screen, if one has been defined, and then either the Breeze Main Menu or your Personal Menu. You can, using Signon Command Maintenance, define other actions that should take place when Breeze is invoked for a particular user. Signon Command Maintenance will allow you to define one or more commands that should be executed for a particular user. For example, if you have an employee whose only function is to enter receipts into the system, you could cause the Receipts application to be initiated each time that employee signs on, bypassing all menus. This is another example of how Breeze can simplify and streamline your day-to-day operations.

BREEZE REPORTING

There are a number of reports that can be produced that will assist you in customizing your Breeze Menus and documenting how you have set up Breeze. All of these reports can be executed on demand.

Menu Selections

The Menu Selections report is a simple listing of every menu selection that has been defined in Breeze. There are two versions of this report. The first lists the selection number and description for each menu selection. The second version lists the selection number, description and commands that will be executed when the selection is chosen.

Personal Menus

The Personal Menus report lists each Personal Menu that you have defined and the menu selections that will appear on each one.

Security

There are three versions of the Breeze Security report. One version lists each password defined in Breeze and the menu selections secured by each password. Another version lists each Device ID and the menu selections secured by the Device ID. The last version of the report lists each User ID and the menu selections secured by the User ID.

System Management

There are several Freedom Series/ec21 functions specifically designed to manage your processing environment. These functions help ensure the integrity of your data, simplify and automate recurring procedures, and tailor Freedom Series/ec21 to your company personality.

TAILORING FIELD NAMES

Freedom Series/ec21 displays use three common terms: Customer, Customer P.O., and Salesman. The System Tailoring Selection feature allows you to designate alternative terms for these three Freedom Series/ec21 standards, in one place, and have your alternative terms appear on all Freedom Series/ec21 displays. For example, you may refer to your customers as clients or dealers. By changing the system prompt to Dealer you can cause the term Dealer to appear on Freedom Series/ec21 displays instead of the standard term Customer. This is a clear example of one of the hallmark characteristics of Freedom Series/ec21--the ability to have the software take on your company's personality without the need for programming changes.

USER DEFAULTS

Many Freedom Series/ec21 functions require that the location (branch, warehouse, sales office, etc.) and/or division be identified to process transactions correctly. The User Defaults function allows you to identify for each user the default location for sales, inventory transactions, and the physical location of the user. For example, using User Defaults you could indicate that a terminal is located in a remote sales office, that orders and sales entered on by that user are credited to a different sales branch, and the orders are normally filled by a particular regional warehouse.

OUTPUT QUEUE MAINTENANCE

The Output Queue Maintenance function allows you to control the routing of Freedom Series/ec21 reports and other printed output to particular printers. Using Output Queue Maintenance you can, by location or location/device combination, designate the printer to which a particular report should be routed. You could, for example, cause picking documents to be routed to the correct printer based on the location entered on the order, or cause A/P Edit and Post reports to be routed to a printer located in the A/P department.

JOB SCHEDULER

There are a number of Freedom Series/ec21 and system functions that should be run on a routine basis. For example, you could schedule the Inventory Adjustments Report to run each night. To automate the execution of routine Freedom Series/ec21 functions Freedom Series/ec21 provides a Job Scheduler. Jobs can be scheduled by date, day of the week, or to execute every so many days. Using the Job Scheduler, you could automate the purging of paid items in Accounts Receivable to the A/R History file and the subsequent production of Customer Statements at the end of each month.

CHANGE MANAGEMENT

Butler & Curless Associates has selected TurnoverTM, by SoftLanding Inc. as its change management tool. Your Information Systems department will install the TurnoverTM Remote Module, allowing seamless communications with us. Used in conjunction with a Secure Remote Connection, TurnoverTM facilitates fast and accurate updates of fixes and enhancements. The updates are automatically loaded into a quality control library, allowing you to control the final move into production.

DATABASE PURGE

Freedom Series/ec21 maintains several databases of detail transactions including sales orders, general ledger, accounts receivable transactions, and accounts payable transactions. Most users of Freedom Series/ec21 set a policy for the length of time these detail transactions will be maintained. The Database Purge function selectively removes from these databases transactions that, because of their age, no longer need to be retained or can be archived to off line storage.