

UNISYS

**Enterprise Information
Centre
EIC 4.00**

**UNISYS
Administrator's Reference
Manual**

June 1994

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Page

Issue

About This Document

This guide is for EIC system administrators. It assumes a reasonable understanding of DP terms and concepts, and that you will have attended the Basic MAPPER User Workshop.

Purpose

The EIC Administrator's Guide is designed for the people who will be responsible for the running of a EIC system. This guide explains the functions of the EIC system and how to use them.

How to Use this Guide

The document covers the following general topic areas:

1. Introduction

Containing an overview of the system and some special features that make it unique.

2. Usage and Management

Sections detailing how to establish and maintain the system and its various functional components.

3. Education

An overview of the user and information provider education requirements.

4. Reference Information

Containing technical and "help" resource information, plus details of each associated application.

Related Product Information

EIC User's Reference Manual

Contents

About This Document	iv
Section 1 Introduction to EIC	1-1
1.1 Overview.....	1-1
1.1.1 The EIC Solution.....	1-1
1.1.2 Information Providers.....	1-2
1.1.3 Users	1-2
1.1.4 The Administrators Role.....	1-2
1.1.5 Documents	1-2
1.1.6 InfoGroups.....	1-3
1.1.7 Menus.....	1-3
1.1.8 MyMenu.....	1-3
1.1.9 News.....	1-4
1.1.10 Keywords	1-4
1.1.11 Profiles	1-4
1.1.12 Screens	1-5
1.1.13 Forms	1-5
1.2 Liaison with the MAPPER Coordinator	1-6
1.2.1 User Resources Requirements.....	1-6
1.2.2 Advice on Technical Issues.....	1-6
1.3 Setting Up a Menu Structure	1-6
1.4 Managing Users	1-7
1.4.1 Managing Data	1-7
Section 2 Using EIC	2-1
2.1 Logging On	2-1
2.1.1 Logging On to the System.....	2-2
2.2 EIC Screen Layout	2-3
2.3 Navigating the Screen.....	2-8
2.3.1 Selecting a Menu Item - Icon Menu.....	2-8
2.3.2 Selecting a Menu Item - Menu List Box.....	2-8
2.3.3 Menu Bar Options.....	2-8
2.4 Using the Menu Bar.....	2-9
2.4.1 Selecting an Action from the Menu Bar	2-10
2.4.2 File Pull-down Menu - Movement of Documents	2-11
2.4.3 Edit Pull-down Menu - Document/Menu Editor	2-12
2.4.4 View Pull-down Menu - Changing Your View.....	2-13
2.4.5 Options Pull-down Menu - Setting Personal Options	2-14
2.4.6 Window Pull-down Menu - Changing to another Menu	2-15
2.4.7 Admin Pull-down Menu - System Maintenance	2-16
2.4.8 HELP Pull-down Menu - The System Help Area.....	2-18
2.5 Marking a Menu Item	2-19
2.6 Unmarking a Menu Item.....	2-19
2.7 Using the Scroll Bar	2-20
2.8 Searching for Information - the View FIND Command.....	2-21
2.9 Finding the Correct Keyword.....	2-22

2.10	Special Facilities	2-23
2.10.1	MyMenu	2-23
2.10.2	Switching Between MyMenu and Other Menus	2-23
2.10.3	How to Add an Item to MyMenu	2-23
2.10.4	To Delete an Item from MyMenu	2-24
2.10.5	What's New	2-24
2.10.6	NotePad	2-24
2.10.7	To Create a NotePad Document	2-25
2.10.8	Managing the NotePad Document	2-26
2.11	Help	2-27
2.12	Print	2-28
2.13	Mail	2-29
2.14	Download	2-29
Section 3	Information Management	3-1
3.1	Management Policy on Information Distribution	3-1
3.1.1	Distribution Channels for Corporate Information	3-1
3.2	Where the Information Comes From	3-1
3.2.1	Submissions From Local Sources	3-1
3.2.2	Submissions from Remote Sources	3-2
3.2.3	Procedure for Reviewing Remote Submissions	3-2
3.3	Other Information Sources	3-3
3.3.1	File Imports	3-3
3.4	Where the Information Goes To	3-3
3.4.1	The Screen	3-3
3.4.2	Electronic Mail	3-3
3.4.3	Facsimile	3-3
3.4.4	Exporting to Workstation	3-4
3.5	Where the Information is Stored	3-4
3.6	MAPPER - What you Need to Know to Manage EIC	3-4
Section 4	Setting up the System	4-1
4.1	EIC System Sizing Guidelines	4-1
4.2	Creating System Entities	4-5
4.2.1	Organisation Codes	4-6
4.2.2	Cost Centre Codes	4-8
4.2.3	Admin Contact Information	4-9
4.2.4	Setting up Profiles	4-10
4.2.5	Setting up Information Providers	4-12
4.2.6	Setting up InfoGroups	4-12
4.2.7	Registering Users	4-15
4.3	Setting Up a Menu Structure	4-18
4.3.1	Managing Menus	4-18
4.3.2	The Index Section of the EIC Menus	4-18
4.3.3	The Organisation Section of the EIC Menus	4-18
4.3.4	How the Two Sections are Related	4-18
4.3.5	FAST ACCESS MENUS	4-19
4.3.6	Example Structures	4-19

4.4	Establishing Items on Menu Screens.....	4-22
4.4.1	Menu - Creating a New Menu Entry	4-23
4.4.2	Form - Creating A New Input Form	4-26
4.4.3	Document - Entering a Free-Form Document.....	4-27
4.4.4	Application - Connecting an External Application	4-28
4.4.5	Summary - Setting Up a Summary Note	4-29
4.4.6	Conference - Setting Up a New Conference Area and Facility.....	4-30
4.4.7	Bulletin - Bulletin Board Establishment.....	4-32
4.4.8	Changing Icons	4-34
4.5	Getting Data into the Structure	4-38
4.5.1	Creating Documents	4-38
4.5.2	Updating a Blank Document.....	4-38
4.5.3	Importing Files.....	4-39
4.5.4	External Document Interchange and Placement.....	4-42
4.5.5	The Document Interchange and Placement Mechanism.....	4-42
4.5.6	Distribution List Establishment	4-44
4.5.7	Spawning Menus.....	4-47
4.5.8	Document Interchange and Placement - System Overview.....	4-52
4.5.9	DIP System Tables and Components.....	4-53
4.5.10	DIP System Tables Summary	4-54
4.5.11	Remote EIC User Registration	4-56
4.6	Loading Documents After the System Has Been Set Up.....	4-58
4.6.1	Create an 'INDEX' Menu	4-59
4.6.2	Load Documents into Index Area	4-60
4.6.3	Creating a Menu Structure	4-60
4.6.4	Copying Documents from Index to Relevant Menus.....	4-60
4.6.5	Copying Documents into Personal Menus	4-61
4.7	Managing InfoGroups.....	4-61
4.8	Updating Documents.....	4-62
4.9	Forms	4-63
4.9.1	Using Forms	4-63
4.9.2	Creating Forms.....	4-63
4.9.3	Creating a Blank Form	4-64
4.9.4	Starting to Update the Form.....	4-64
4.9.5	Completing the Form Specification	4-64
4.9.6	Setting up the Form Title and Options.....	4-65
4.10	Document Ageing.....	4-66
4.11	Wastebasket.....	4-66
Section 5	System Maintenance	5-1
5.1	Copying Documents and Other Items Between Menus	5-1
5.2	Moving Documents and Other Items	5-1
5.3	Changing All or a Major Part of the Structure	5-2
5.4	Deleting Profiles.....	5-2
5.5	Date Formats	5-2
5.6	Language	5-3
5.7	Display Account User Only.....	5-3
5.8	Changing Cost Codes.....	5-3

5.9	Someone Else's View - Act As.....	5-4
5.10	Changing Job Profiles, e.g. Reorganisation.....	5-4
5.11	Changing Information Owner, e.g. Someone Leaves.....	5-4
5.12	Changing Screen Attributes.....	5-5
5.13	System Message.....	5-5
5.14	Document Pool.....	5-6
Section 6	Account & Application Registration.....	6-1
6.1	Account and Application Registration.....	6-1
6.1.1	Accessing the Account Registration Module.....	6-2
6.1.2	Defining a New Account.....	6-4
6.1.3	Account Maintenance - Review Dates.....	6-5
6.1.4	Tie the Account to the Application.....	6-6
6.1.5	Define Application Specific Details.....	6-7
6.1.6	Add User to an Account.....	6-10
6.1.7	Adding User-Specific Facilities in Account.....	6-11
6.2	Deleting Items From the Registration System.....	6-12
6.2.1	Disconnecting a User from an Account.....	6-12
6.2.2	Disconnecting an Application from an Account.....	6-12
6.2.3	Deleting an Account.....	6-12
Section 7	Management Reports.....	7-1
7.1	The Basic Reports.....	7-1
7.2	Profile and Associated User Report.....	7-2
7.2.1	Summary Report.....	7-2
7.2.2	Nominated Profile Report.....	7-3
7.3	Resource Utilization.....	7-4
7.3.1	Summary by InfoGroup.....	7-4
7.3.2	Summary of Nominated InfoGroup.....	7-5
7.3.3	Details by Organisation and Cost Centre.....	7-6
7.3.4	History Report.....	7-6
7.4	Operations Reports.....	7-7
7.4.1	InfoGroup Reports.....	7-7
Section 8	User Education.....	8-1
8.1	Users.....	8-1
8.1.1	Logging on to EIC.....	8-1
8.1.2	Use of the Menu Bar within EIC.....	8-1
8.1.3	Locating Information.....	8-2
8.1.4	Using 'MyMenu' & the NotePad.....	8-2
8.1.5	Printing Documents.....	8-2
8.1.6	Information Providers.....	8-2
8.1.7	Entering Information into EIC.....	8-2
8.1.8	Categorize Information by Using Keywords.....	8-3
8.1.9	Restrict Access by Profiling Information.....	8-3
8.1.10	Create Summaries for Documents Where Appropriate.....	8-3
8.1.11	Put Information into the Appropriate Menu.....	8-3

8.2	InfoGroup Owner.....	8-3
8.2.1	Menu Organisation.....	8-3
8.3	Systems Administrator	8-4
Section 9	Executive View Manager	9-1
9.1	Overview.....	9-1
9.1.1	User's View	9-1
9.1.2	Chained Views	9-2
9.1.3	Constructing Views	9-3
9.1.4	Support Domains	9-4
9.1.5	User Registration	9-4
9.1.6	View Manager - Administration	9-5
9.1.7	View Chaining.....	9-6
9.1.8	Working with EIC View Manager.....	9-7
9.2	Tables.....	9-8
9.2.1	View Manager Index Table Relationships.....	9-8
9.2.2	Database Access Manager Table Index	9-9
9.2.3	Adding or Modifying a Table	9-10
9.2.4	Accessing a Data Table.....	9-11
9.2.5	Column Data format.....	9-11
9.2.6	Date and Time format.....	9-12
9.2.7	Column security.....	9-13
9.3	Reports	9-11
9.3.1	Maintaining Reports	9-11
9.3.2	Adding / Modifying a Report.....	9-12
9.3.3	Defining Report Parameters.....	9-13
9.3.4	Defining Column Selections	9-14
9.3.5	Defining Row Selections	9-15
9.3.6	Defining Colour Selections.....	9-17
9.3.7	Defining View Lists.....	9-19
9.3.7.1	View Pull-Down - Sub-Level Definition	9-21
9.4	Building Graphs.....	9-22
9.4.1	Graph Index Table	9-22
9.4.2	Changing Graph Title & Options	9-23
9.4.3	Defining Graph Parameters	9-24
9.4.4	Defining Graph Column Selections	9-25
9.4.5	Graph Row Selections	9-26
9.4.6	Selecting the Graph Type	9-28
9.4.7	Defining Chained Views	9-29

Figures

2-1	MAPPER Logon Screen.....	2-1
2-2	First EIC Screen.....	2-2
2-3	Screen Layout Basics.....	2-3
2-4	Screen Icons.....	2-4
2-5	Menu List Box.....	2-5
2-6	Document Display Screen.....	2-7
2-7	Basic Menu Bar Pull-down menus.....	2-9
2-8	Options available under File on the Menu Bar.....	2-11
2-9	Options available under Edit on the Menu Bar.....	2-12
2-10	Options available under View on the Menu Bar.....	2-13
2-11	Options available under Options on the Menu Bar.....	2-14
2-12	Options available under Window on the Menu Bar.....	2-15
2-13	Options available under Admin on the Menu Bar.....	2-16
2-14	Options available under Help on the Menu Bar.....	2-18
2-15	Scroll Bars.....	2-20
2-16	The Find Window.....	2-21
2-17	List of Valid Keywords.....	2-22
2-18	NotePad Showing the File Options.....	2-25
2-19	Help Pull-down - EIC Help.....	2-27
2-20	Electronic Mail Input Screen.....	2-29
4-1	Example Database Configuration.....	4-5
4-2	Administrator's Pull-down Menu.....	4-6
4-3	Organisation Codes Screen.....	4-7
4-4	Add Organisation Window.....	4-7
4-5	Cost Codes Screen.....	4-8
4-6	The Add Cost Centre Window.....	4-9
4-7	Admin Contact Information Screen.....	4-9
4-8	The Profile Maintenance Screen.....	4-11
4-9	The Add Profile Window is Displayed.....	4-11
4-10	InfoGroup Maintenance Screen.....	4-12
4-11	New InfoGroup Details.....	4-13
4-12	InfoGroup Administrators.....	4-14
4-13	Self Registration Screen.....	4-15
4-14	User Registration Maintenance Screen.....	4-16
4-15	User Details Window.....	4-16

4-16	User Profiles Window.....	4-17
4-17	Main System Screen.....	4-19
4-18	User Group Index.....	4-20
4-19	Index to Information Items	4-20
4-20	Access to Other Applications.....	4-21
4-21	Value Added Group Index	4-21
4-22	New Item Selection Screen	4-22
4-23	New MENU Item Set-Up Screen	4-23
4-24	Title and Security Set-Up Screen	4-24
4-25	Summary Input Screen	4-24
4-26	Item security Input Screen.....	4-25
4-27	Define the InfoGroup for the Form	4-26
4-28	Application Details Screen	4-28
4-29	Summary Note Input Screen	4-29
4-30	Summary Note Display	4-30
4-31	Conference Setup Input Screen	4-30
4-32	Initial Menu Screen for Conference Area.....	4-31
4-33	Bulletin Input Screen.....	4-32
4-34	Example Bulletin Pop-Up.....	4-33
4-35	Change Item - Edit Pull-Down	4-34
4-36	Select Item to Change.....	4-35
4-37	Change Menu Item.....	4-35
4-38	Choose Icon Source.....	4-36
4-39	Select Icon Picture.....	4-36
4-40	Return from Icon Selection.....	4-37
4-41	File Import Screen	4-39
4-42	File Type Selection, Associated Application	4-40
4-43	EIC Menu Item Establishment.....	4-41
4-44	Imported PC File Location Screen.....	4-42
4-45	Document Interchange Menu	4-43
4-46	System Tables Menu on Admin Pull-down	4-44
4-47	Dip Distribution List Maintenance Menu	4-44
4-48	DIP Distribution List Input Screen.....	4-45
4-49	DIP Destination Maintenance Screen.....	4-46
4-50	DIP Add Destination Screen.....	4-46
4-51	DIP Distribution List Maintenance Screen - Example.....	4-47
4-52	Spawning Menus Maintenance Screen.....	4-48
4-53	Nominating a Spawning Menu.....	4-48

4-54	Spawning Target System details	4-49
4-55	Spawning Menus - Add Destination System Details.....	4-49
4-56	Target System Security Details	4-50
4-57	Target System Maintenance Screen.....	4-51
4-58	Example Spawning Maintenance Screen	4-52
4-59	Remote User's Table.....	4-54
4-60	Remote Users Maintenance Screen	4-56
4-61	Remote User's Details Screen.....	4-57
4-62	Administrator's File Pull-down Menu.....	4-58
4-63	New Menu Item Selection	4-59
4-64	New Menu Item Definition Screen	4-59
4-65	Setting the Update Flag	4-62
4-66	Wastebasket InfoGroup Selection	4-67
4-67	Mark the Items to Reinstate or Delete	4-68
5-1	Date Format Selection	5-2
5-2	Language Selection	5-3
5-3	'Act As' Another User	5-4
5-4	System Message Screen.....	5-5
5-5	Document Pool Menu.....	5-6
6-1	Account & Application Registration.....	6-1
6-2	Registration Selection Pop-up	6-2
6-3	Account & Application Registration - Main Menu	6-3
6-4	The Account List	6-4
6-5	New Account Entry Pop-up	6-4
6-6	Account Maintenance Screen.....	6-5
6-7	Account Review Date Pop-up.....	6-5
6-8	New Application Pop-up.....	6-6
6-9	Application Registered for Account.....	6-7
6-10	MIP Account Profile Screen	6-8
6-11	MIP-Specific Functionality Pop-up	6-8
6-12	Example Document Selection for MIP.....	6-9
6-13	Selected MIP Functionality Assigned to the Account	6-9
6-14	User 'ADAMS' tied to Account TEST001	6-10
7-1	Admin pull-down Report Selection.....	7-1
7-2	Management Report Selection Window.....	7-2
7-3	Profile Summary Report.....	7-2
7-4	Nominated Profile Report.....	7-3

7-5	Nominated Profile Report.....	7-3
7-6	Detail Summary by InfoGroup.....	7-4
7-7	InfoGroup Selection Window.....	7-5
7-8	Nominated InfoGroup MAPPER usage details.....	7-5
7-9	Report by Org and Cost Centre.....	7-6
7-10	History Report Selection.....	7-6
7-11	InfoGroup Reports Selection.....	7-7
7-12	InfoGroup Selection - Reporting.....	7-8
7-13	Sample Menu Growth Report - Single Selection.....	7-8
7-14	Update Rate Selections.....	7-9
7-15	InfoGroup Update Rate Report.....	7-10
7-16	Wastebasket Report By Selected InfoGroup.....	7-10
9-1	User-s View - Simple Case.....	9-1
9-2	User-s View - Drill Down.....	9-2
9-3	Overview - Constructing Views.....	9-3
9-4	Support Domains.....	9-4
9-5	View Administration Flow.....	9-5
9-6	Drill-Down.....	9-6
9-7	Working in the Functional Windows.....	9-7
9-8	Table Relationships.....	9-8
9-9	Data Access Manager Table Index.....	9-9
9-10	Table Definition.....	9-10
9-10.1	Data Table run call.....	9-11
9-10.2	Column data format selection.....	9-11
9-10.3	Date and Time format.....	9-12
9-10.4	Column Security definition table.....	9-13
9-11	Report Index Menu.....	9-11
9-12	Report Definition Entry Menu.....	9-12
9-13	Defining Report Parameters.....	9-13
9-14	Item Descriptions.....	9-14
9-15	Defining Row Selections.....	9-15
9-16	Defining Row Selections - Showing Value 2 Field.....	9-15
9-17	Colour Definition Table.....	9-17
9-18	Colour Definition Table - Showing Column Name & Key Fields.....	9-17
9-19	View List Definition Table.....	9-19
9-20	View List - Sub Level Definition.....	9-21
9-21	Graph Table Index.....	9-22

9-22 Graph Options..... 9-23
9-23 Graph Parameter Table 9-24
9-24 Graph Column Selections 9-25
9-25 Graph Row Selections..... 9-26
9-26 Graph Type Selection Table..... 9-28
9-27 Defining Chained Views 9-29
9-28 User Registration - Admin Pull-Down 9-30
9-29 User Registration Table..... 9-31

Section 1

Introduction to EIC

1.1 Overview

As organisations grow and change it is very difficult to meet and maintain the information needs in the work place. The information in question is the operational and business information that allows people to keep up with what's happening in the organisation or corporate body, carry out their job role or provide their routine reports to management.

Over time a whole range of different systems may be established, generally as a result of specific computing facilities in place to service finance and administration, sales, marketing organisations, etc. The day to day needs of an organisation beyond this are generally seen to be served by various word processing and secretarial support facilities, spreadsheets on local PC's, etc.

In many organisations electronic mail or information access systems of various types are used to get information to staff, but these are generally not consistent in their structure and are often ad-hoc in nature. These often come into being in response to some management cry to 'do something.'

The proliferation of these systems is a real problem for people in an organisation (especially new staff) making it very difficult for them to meet their quality objectives.

1.1.1 The EIC Solution

EIC is intended to provide a general solution to the management of the business information flow in an organisation. This flow is seen as outwards from the corporate entity and inwards to the corporate entity from the field.

The EIC application provides a 'toolbox' of basic functionality which may be manipulated and structured by a system administrator to meet the particular needs of an organisation. This functionality is intended to satisfy the 'real world' needs of people in the work place and requires no technical intervention to manage it.

EIC can be used as a 'front-end' to other applications so that it may manage access and security requirements in a structured way. Other applications can be developed very quickly using EIC to manage security and user registration.

EIC can be used to display data from an external application or from a specific external MAPPER cabinet, drawer & report (mode, type, rid). This means that management reports or charts which are maintained by external applications may be easily presented to users.

EIC allows a 'workbench' type facility to be structured so that novice staff can be guided to the information and systems areas they need to do their job.

EIC is written in MAPPER and runs on Unisys 2200, A-series and UNIX platforms.

EIC 2.0 implementation emulates a 'windows' environment for non-intelligent terminal support and is CUA standards compliant.

EIC 3.0 provides full graphics user interface capabilities (Designer Workbench - 12/92)

1.1.2 Information Providers

Information is supplied to the system by information providers. In most cases information providers can only provide information to those areas of EIC that are relevant to their job role.

1.1.3 Users

Information is accessed by users, who can display information, but not change it. Exceptions are found in public access areas of the system, for example bulletin boards, conferencing, electronic mail.

People may be information providers in some instances, users in others.

1.1.4 The Administrators Role

Your role will be to ensure the smooth operation of the system. Apart from supporting the system functions, hardware operation, system resources, etc., you will help information providers to make sure their information is organised properly within the structure of EIC and you will help users by making sure they have access to the information they need.

To do so, you will need to keep in touch with what information is coming into the system, where it is put, how menus are structured, how documents are cross-referenced, who has access to it, etc.

As you become more familiar with the system, you will realize what an important part you play in its effectiveness.

1.1.5 Documents

Information in EIC is usually represented as straight ASCII text, without formatting, and is kept in documents. Documents can be organised in and attached to menus. Documents can be assigned keywords to let users search for information based on a particular subject. You can assign "profiles" to documents to restrict access to them. You can also attach a summary to a particular document, which gives a brief overview of what the document is about.

1.1.6 InfoGroups

The sources of information entered in EIC are classified into "InfoGroups". Each InfoGroup has an owner registered within EIC, who is responsible for the information that goes into the InfoGroup, that is, information provided by the group. An example of possible InfoGroups for an EIC site might be: Sales, Support, Manufacturing, Design, Finance, Administration and so on.

1.1.7 Menus

There are two independent types of menus in EIC. The first is used to help you specify what the program should do next. In this guide, it is called "The Menu Bar". The Menu Bar appears at the top of each screen and contains a number of headings for different types of actions. When you select a heading from the Menu Bar its corresponding action list is displayed. It lists all the possible actions that can be initiated.

The other type of menu is concerned with the representation of information in EIC. In this guide, it will retain the name "menu".

EIC menus are used to represent the organization of the information within EIC. That representation depends not only on the information itself, but also on the profile of the individual user. A user whose profile defines a wide view of information will see more content in the menus than a user with a narrow view.

1.1.8 MyMenu

The structure of menus in EIC is a hierarchy, which can be several levels deep. As well as the predefined menu which users see when you first use EIC, there is an individual custom menu for each user, called "MyMenu". A user can alter the content of their individual MyMenu at any time, to represent the areas of information they access most frequently. As well as documents and summaries, a user's "MyMenu" may include menu names and provide access to other applications.

1.1.9 News

As new documents are added by information providers, they can be nominated for inclusion in the News area. The decision to include the document may be made by the provider or by you.

At any time, system users can Select "News" from the Window pull-down menu on the Menu Bar to list the News, i.e. new documents that have been added to the system.

New material which is relevant only to a small group of people should not be put in the News area. News documents are usually listed in reverse date order. They remain on the News list for 60 days. (Other documents normally remain in the system for up to 2 years).

1.1.10 Keywords

Keywords are attached to menu items to help users find information on a specific subject, and can be assigned for any type of menu item (documents, sub-menus, etc.). A command is provided to display valid keywords.

EIC also uses profile keywords to define profiles, but these are explained later.

1.1.11 Profiles

Profiles are used to manage users' access to menu items. They can:

- Reflect job roles within the corporate structure;
- Define the job roles of a user;
- Define access for a menu item.

When defining job roles within the corporate structure, a profile is simply a collection of profile keywords which represent roles within the organization. The profile database may be organized into a hierarchy, to better represent the structure of those roles.

When defining the job roles of a user, a profile is a list of profile keywords which have been assigned to that user. This defines which areas of information they have access to.

When defining access for a menu item, a profile is a table of profile keywords. The way in which the keywords are organized on the table defines which profile keywords a user must have in order to be able to access the menu item.

Example:

Sales may be a parent keyword to Sales Exec, Sales Group 1, Sales Group 2.

Everyone working in Sales will have the Sales keyword in their profile which will let them access general information in the Sales menu. However, only members of the specific groups will have the respective keywords in their profiles, that allow them to look at sensitive information.

You, as administrator, and the information providers must make sure that information is correctly protected by being assigned the correct access keywords to match the user profiles.

1.1.12 Screens

Within the context of EIC, a screen is the rectangular area immediately below the Menu Bar and above the command line.

When you are looking at menus, the screen contains a list of sub-menus, documents or other menu item types (explained later).

When you access a document or other item, the screen contains the contents of that document. If the screen is not big enough, you can use the function keys to scroll through its contents.

1.1.13 Forms

Forms defined in EIC act as data entry templates, where the data is automatically posted to a pre-set destination, or the application program it was designed for.

1.2 Liaison with the MAPPER Coordinator

This is one of the most important jobs of the EIC administrator. Generally, the MAPPER coordinator is responsible for all of your computer resources. Effective communication of your resource requirements is essential so that you can provide the necessary services to your users.

There are two main areas which you need to discuss with our MAPPER coordinator. These areas are the EIC user base resource requirements and advice on technical issues, for example linking other applications to EIC.

1.2.1 User Resource Requirements

Both you and the MAPPER coordinator need to be aware of:

- The number of EIC users;
- The processing time and storage space that they require, and the charging mechanism for those resources;
- Peak usage times, when users make the greatest load on processing resources;
- What the system response time is like;
- Increasing storage requirements, and how to manage the problem of running out of space, if it should happen;
- Feedback from users on these issues.

1.2.2 Advice on Technical Issues

You may have to deal with technical problems which you have not encountered before. You may need to refer to the MAPPER System Administration Guide.

If a solution to the problem is not readily apparent the next step is to consult your MAPPER coordinator.

1.3 Setting Up a Menu Structure

When you first log on to EIC, you should see a default menu structure already in place.

You should initially work within the existing menu framework, but you can easily modify the structure at a later date. See the section "Designing Your Menu Structure" later in this guide for details.

1.4 Managing Users

For new users, you need to:

- Explain what EIC can do for them;
- Give them a copy of the EIC User's Guide;
- Enter their details into the user database, and set up their access profile. You may also need to amend the profile database to cater for new roles. The procedure for adding new users is covered in a later section of this manual.
- Ensure that users receive adequate training. This training should cover all the material in the User's Guide, and ideally it should be done by someone who uses EIC the same way the new user will. If the user is also to be an information provider he/she should have a good understanding of the structure of menus, and understand profiling of documents, and when and how it should be done.

As advanced users become familiar with EIC, they may want to assist in creating documents and managing information. In this case they need to have a full understanding of the relevant parts of EIC and will work cooperatively within the framework of your existing system.

1.4.1 Managing Data

The aspects to managing data on EIC are:

- Grouping
- Profiling
- Identifying
- Structuring
- Database Maintenance

Grouping

You should set up InfoGroups so that they reflect the general grouping of information within the corporate structure. InfoGroups are necessary so that responsibility can be defined for data. You can assign up to 36 assistants to help the InfoGroup owner manage the InfoGroup.

Profiling

Profiling is done to control access to information. You will need to set up the profile database so that the profile keywords reflect appropriate user roles. You will also need to ensure that the hierarchical structure of the profile database reflects the roles within the corporate structure. Information providers should set up profiles on any documents that they bring into EIC when the information should be seen only by a specific group of users. This should be done when the document is created or imported, and not left to a later date.

Identifying

Identifying is the process of assigning appropriate keywords and descriptions to items brought into EIC. This process includes summarizing where necessary and assigning appropriate keywords and descriptions to the data. This will assist users to find relevant information quickly.

Structuring

Structuring is organising information into a hierarchical system of menus and sub-menus. As new information is added, you may need to change the existing menu structure to better represent the new data. When you do this, you should make the distinctions between the all of the items within the menu clear to everyone using EIC.

Database Maintenance

You should always keep the user database and profiles up to date. Entries should be added for new users as they require access to EIC, superseded information updated, and profiles changed as user job descriptions change.

You need to update the system tables, which contain the organization and cost centre codes. This should be done when initially setting up EIC, and then whenever the organization codes change.

You should ensure that the Administrator Contact Screen accurately indicates to users who they should contact if problems arise.

Section 2

Using EIC

2.1 Logging On

The instructions that follow take you from the initial logon screen.

```
Unisys MAPPER System 35RLCE5
PAGE - PAAD PRODUCTION MAPPER
Station: 50205 System: 33
```

Please enter the following information,
or press SignOn to sign on as a new user.

```
User-id
Dept #
Password
```

Press XMIT when complete.

1SignOn 2KeyHlp 3 4 5 6ReadMe 7 8Help 9 10Exit

Figure 2-1 MAPPER Logon Screen

2.1.1 Logging On to the System

1. Type in your User-ID, department number, and password.
2. Press XMIT

If you experience difficulties in doing this, please contact your EIC assistance number.

The first EIC screen is displayed. It will look similar to the one shown below.

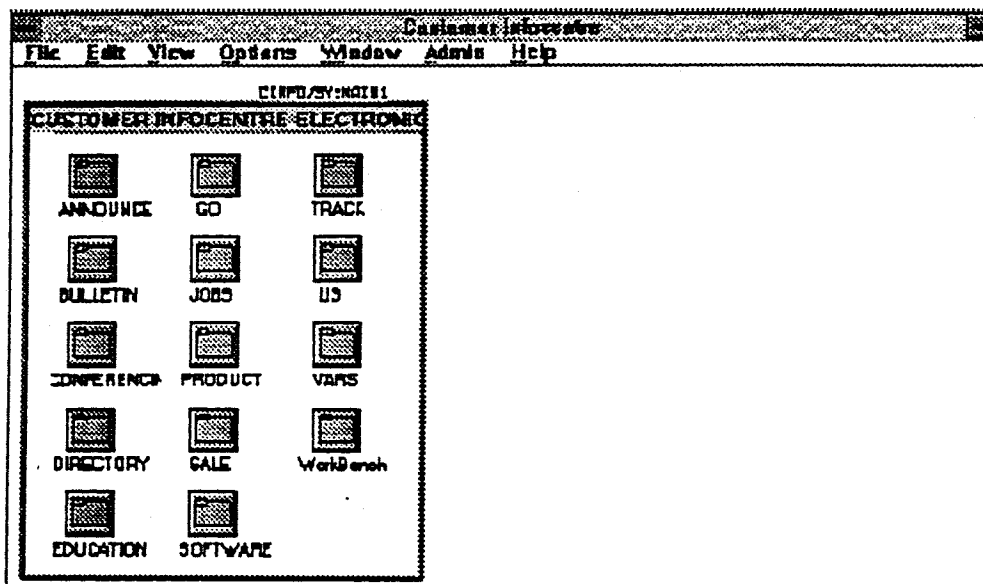


Figure 2-2 First EIC Screen

Once you have logged on, you can use EIC according to your needs.

The following pages explain the basic layout and use of the EIC screens and the next section of the manual gives some step by step examples that you can follow.

2.2 EIC Screen Layout

The Common User Access standard has been used to develop the EIC interface which, in turn, accesses databases kept on a Unisys Mainframe. Using EIC is similar to using many other packages available on PCs.

There are some basic elements of the screen layout that you need to know about:

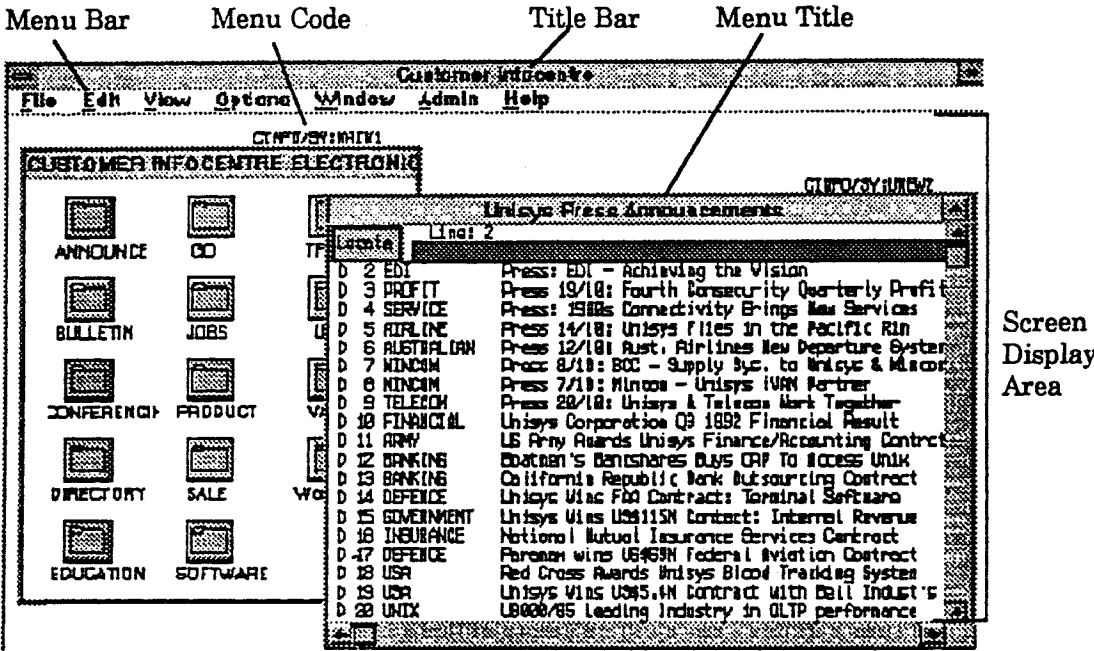


Figure 2-3 Screen Layout Basics

Features to note:

Title Bar

Title of application selected.

Menu Code (Item Number)

A unique code that identifies a menu. (Example, AUS:MAIN1).

Menu Title

Title or description of the menu.

Menu Bar

This shows the titles of action lists you can select to manipulate or view documents or screens. When you select a title from the Menu Bar, a list of the available functions is displayed in a "Pull-down" Menu.

Screen Display Area

The screen display area may have different formats e.g. Icon Menus, Menu lists or Documents.

Icon Menu

A window containing icons representing the various options/applications available.

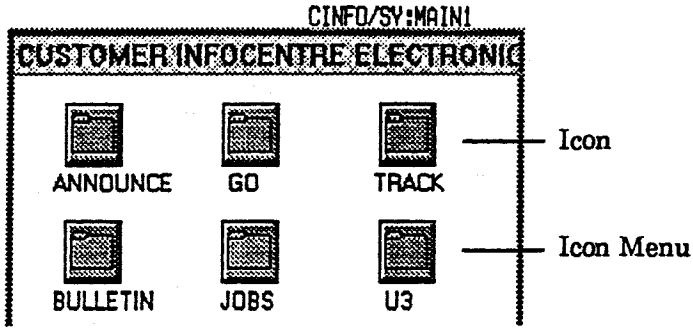


Figure 2-4 Screen Icons

Features to note

Icons

Each icon represents an option which may be selected.

Icon Name

The Primary Keyword to identify this menu entry.

Menu List Box

A window containing individual line entries for the various options/applications available.

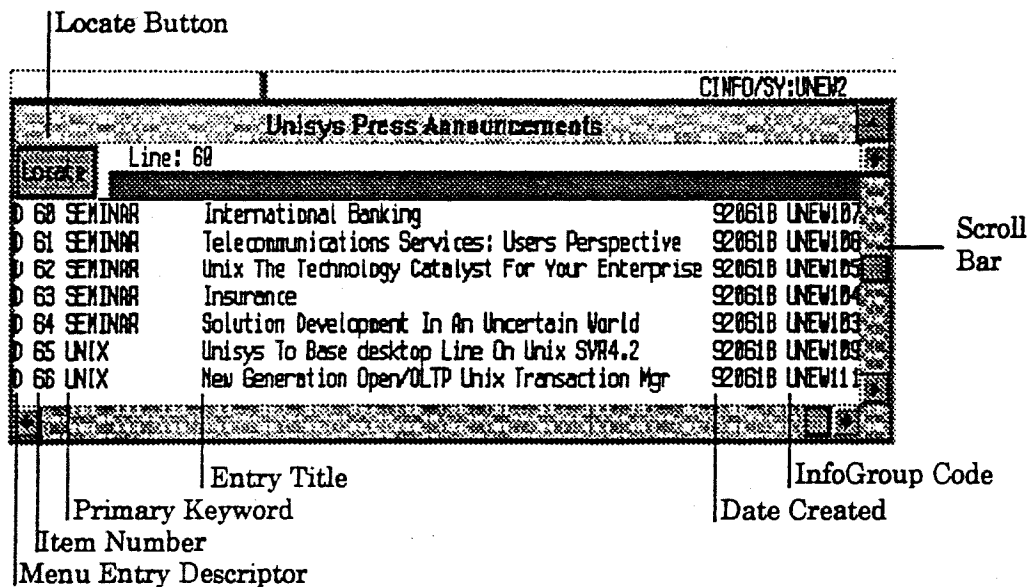


Figure 2-5 Menu List Box

Features to note:

Menu Entry Descriptor

Signifies the type of menu entry. Each type is described on the following page. The complete list is:

A	Application	Link to an external application;
M	Menu	Link to another menu screen;
D	Document	Standard text document;
F	Form	Predefined input form (e.g. ordering);
S	Summary	Summary description of the Link contents;
G	Graphic	MAPPER graphics or chart;
B	Bulletin	Bulletin Board Area;
P	Picture	Bit-mapped Graphics Image.

Item Numbers (1,2,3,etc.)

Enter the desired Item number in the command field to select that item, e.g. "4" displays item number 4.

Primary Keyword

This is the primary keyword for the item and is indicated to assist you in targeting information on a particular menu screen.

Entry Title

This is a single line name or description of the item.

Date Created

This is the date that the item was added to the menu.

InfoGroup Code

This is the code for the InfoGroup to which the item belongs.

Locate Button/Input field

Use this function to locate any text/value on the window.

Scroll Bar (to the right and at the end of the window)

The scroll bar is a proportional mechanism and is used to move the viewing window to the section of the document you want to examine.

Document

A document is displayed as 80 characters of ASCII text. Scroll bars are available on the right side and the end of the window if it is not large enough to contain all the text.

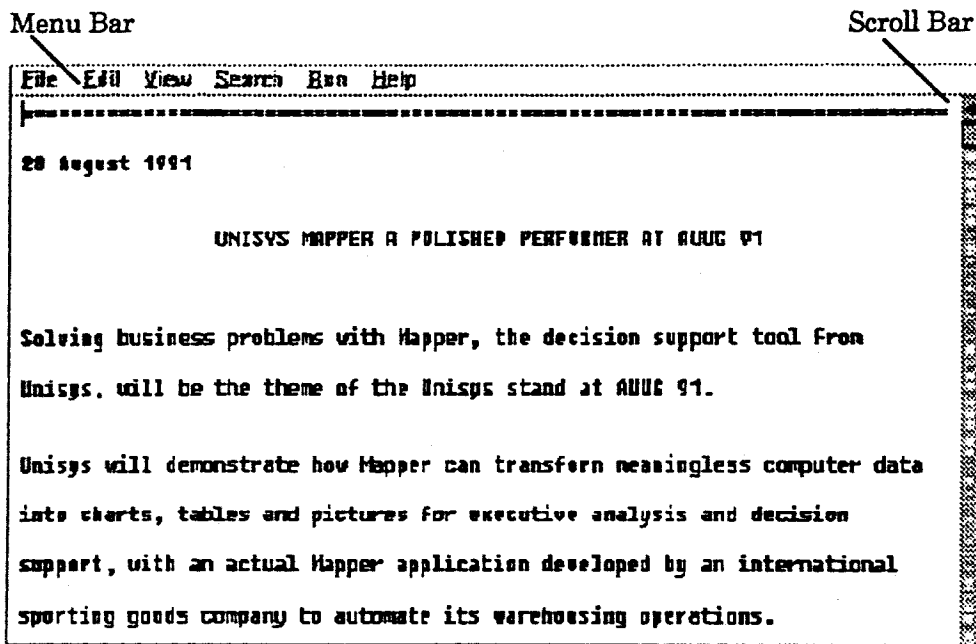


Figure 2-6 Document Display Screen

Features to note:

Scroll Bar (to the right and at the end of the window)

The scroll bar is a proportional mechanism and is used to move the viewing window to the section of the document you want to examine.

2.3 Navigating the Screen

When an EIC screen is displayed use the mouse pointer to move around the screen and menu bar. When the pointer is positioned at the appropriate place click once to initiate the action - eg an option on the menu bar or an icon on the icon window.

NOTE

On a menu list box you must click twice to action an item or else click once to highlight the item and then press XMIT.

2.3.1 Selecting a Menu Item - Icon Menu

Use the mouse to move the pointer to Icon required. Click once (i.e. press the 1st button on the mouse) to act on that item.

If the item is a menu that menu will be displayed. If it is a document that document will be displayed.

2.3.2 Selecting a Menu Item - Menu List Box

Use the mouse to move the pointer to the description area of the menu item required. Click once to highlight the item . Double click (ie press the 1st button on the mouse twice in quick succession) to action that item. Alternatively after highlighting the item press XMIT to action it.

Use the Locate function on the list box to locate any value on the menu list box. Use the mouse pointer or TAB key to move to the locate entry field. Enter the text/value to locate and XMIT or move to the Locate button with the pointer and click, to locate the item required. Click or Xmit again to locate the next occurrence of the item.

For some actions initiated at the Menu Bar you may need to "Mark" the menu item on which you want the action taken. Mark and Unmark are described later in this section.

2.3.3 Menu Bar Options

The options available to you on the Menu Bar change according to the screens you are using. Basic headings found on the Menu Bar include:

File

Edit

View

Options

Window

Admin

Help

Other actions may be available on some screens, e.g. When you are creating a note on your NotePad a Search menu is available.

2.4 Using the Menu Bar

1. Move the pointer to the appropriate Menu Bar heading.
2. Click once.

Basic Menu Bar Pull-down Menus

File	Admin
NotePad	System Message
New Item...	Act As...
Import...	Profile Maintenance
Title and Options...	InfoGroup Maintenance
Access Security...	User Registration >
Mail..	System Tables >
Download	System Options >
Add to MyMenu	Reports
Exit from the System	Document Pool
	Waste Basket
Edit	View
Mark	Find...
Update Document	Keyword list
	Sort by >
Options	Window
My Profile	Previous Menu
My InfoGroup list	Main menu
Date Format >	My Menu
Language >	News
Summary Info	
Help	
Index >	
Using Help	
Information Owner	
System Problems	
About EIC System	

Figure 2-7 Basic Menu Bar Pull-down menus

2.4.1 Selecting an Action from the Menu Bar

1. To access a Menu Bar item move the pointer to the required menu bar title and click once. The pull-down menu containing the actions for that menu title will be displayed.
 - Actions that cannot be initiated are 'greyed out'. This is because that action is inappropriate at this screen or because you do not have the appropriate user profile.

- Actions which have a follow on input screen have '...' after their title.
- Actions which have a follow on cascading menu have '>' after their title.

2. Move the pointer to the required action and click once.

To cancel a Menu Bar pull-down click on the Menu Bar pull-down title.

On any Menu Bar pull-down different options will be available on different parts of EIC e.g. when editing a document.

2.4.2 File Pull-down Menu - Movement of Documents

Use the File pull-down menu to manipulate complete documents or files, add menus or items to menus, maintain security levels, import or export documents or exit the system.

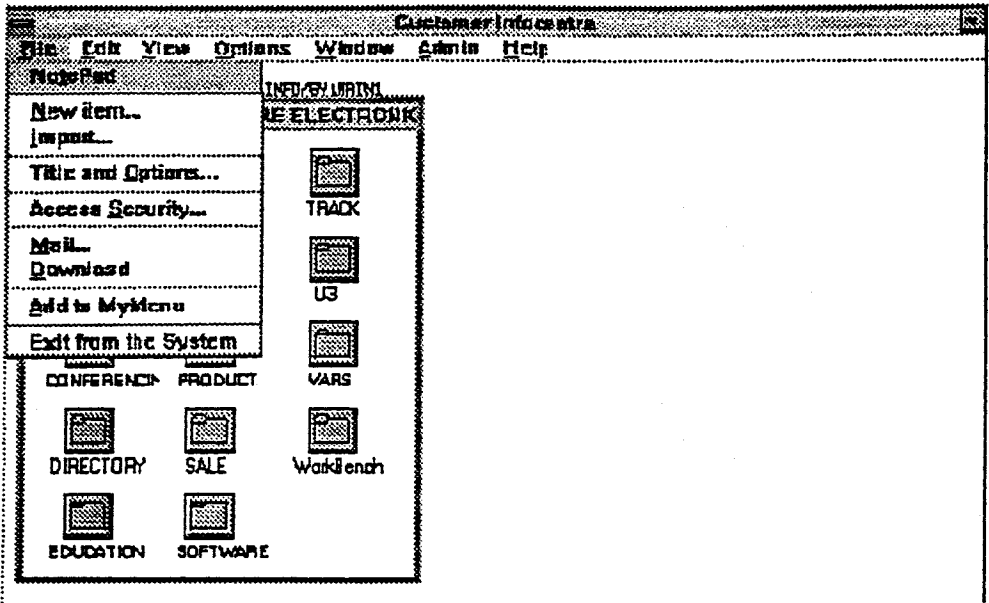


Figure 2-8 Options available under File on the Menu Bar

NotePad

Displays your existing NotePad area for editing.

New Item...

Adds new menus, documents, forms, bulletins etc to the system.

Import...

Imports documents from other systems/hosts and puts them in specified InfoGroups.

Title and Options...

Change titles and options on existing documents.

Access Security...

Set or change access security levels on existing documents.

Mail...

Mail a document to a mailbox.

Download

Download a document to your PC.

Add to MyMenu

Add a menu/document to your own menu.

Exit from the system

Exit from the EIC system.

2.4.3 Edit Pull-down Menu - Document/Menu Editor

Use the Edit pull-down menu to update existing menus, forms and other EIC documents.

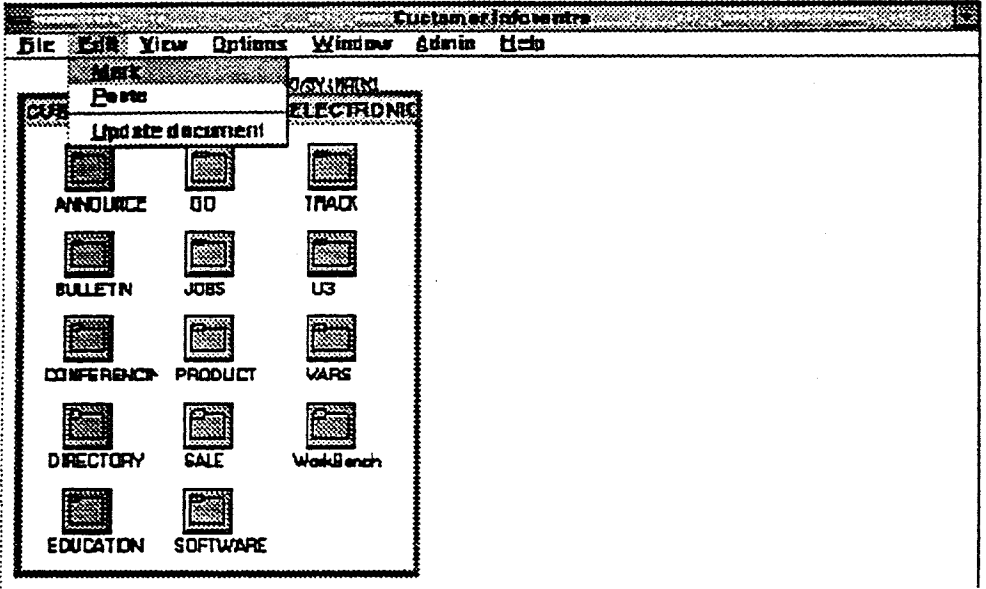


Figure 2-9 Options available under Edit on the Menu Bar

Mark

Marks the item on which you intend to perform some action.

Paste

Places items from the buffer (as result of Cut, Copy or Move) into the menu on display.

Update Document

Takes you into the update mode to update a document.

2.4.4 View Pull-down Menu - Changing Your View

The View pull-down menu provides facilities to locate and manipulate data in the document currently on display.

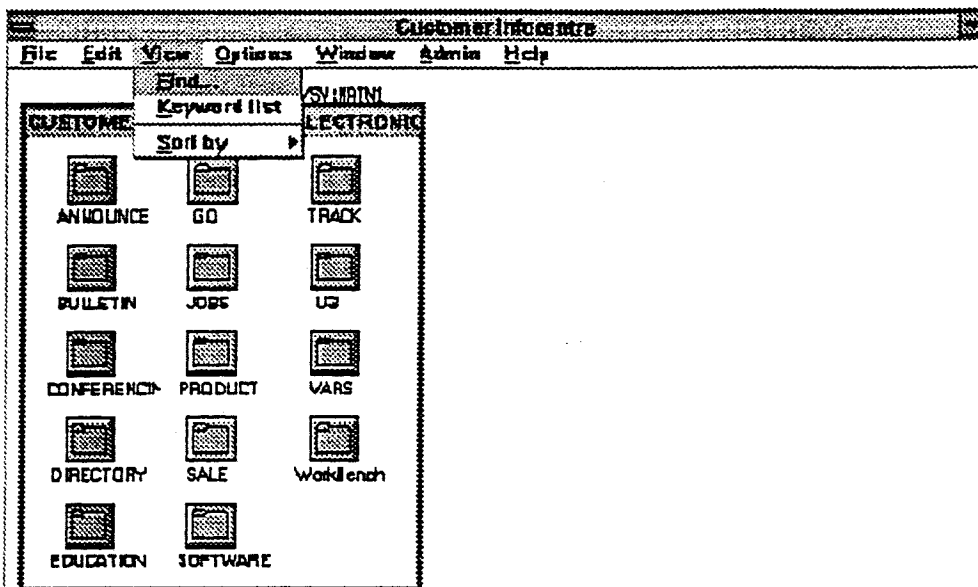


Figure 2-10 Options available under View on the Menu Bar

Find...

Finds a particular string of data - up to 40 characters in the text.

Keyword list

Displays a list of available keywords for a document - provides direct selection capability.

Sort by

Sorts the data by one of the keys displayed on the cascading menu.

- >1 Key (Ascending)
- 2 Key (Descending)
- 3 Subject (Ascending)
- 4 Subject (Descending)
- 5 Date (Ascending)
- 6 Date (Descending)

2.4.5 Options Pull-down Menu - Setting Personal Options

The Options pull-down menu allows the user to personalise some of the system parameters such as Date format and Terminal screen Colour preferences. Two options are provided which are essentially for problem analysis and administrator use - these show the User's system access profile and the Information Groups (InfoGroups) which they may access.

The Options facilities will gradually be expanded as the system develops.

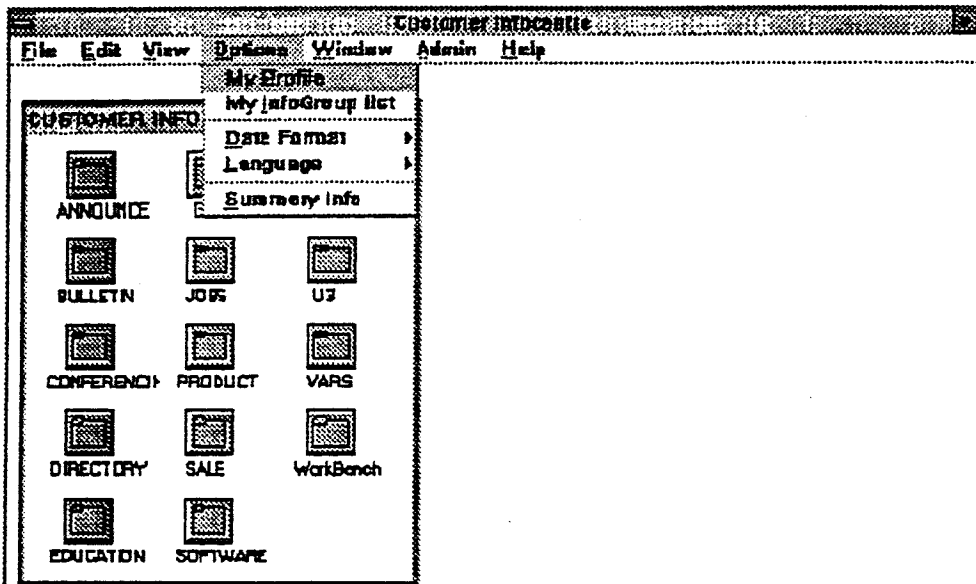


Figure 2-11 Options available under Options on the Menu Bar

My Profile

Admin use, indicates the user's system profile.

My InfoGroup

Admin use, indicates the information areas accessible.

Date Format

Allows the User to select a new date format from the date formats displayed on the cascading menu.

>1 System Default	5 YYMMDD
2 YY.MM.DD	6 DDMMYY
3 DD-MM-YY	7 MMDDYY
4 MM/DD/YY	

Language

Allows the User to select a new language from the languages displayed on the cascading menu.

>1 English

Summary Info

When this flag is selected then subsequently when any menu item is chosen summary information for that item (if available) will be displayed before the details of the menu or document.

2.4.6 Window Pull-down Menu - Changing to another Menu

The Window pull-down menu allows the User to change to a different Menu or display new items.

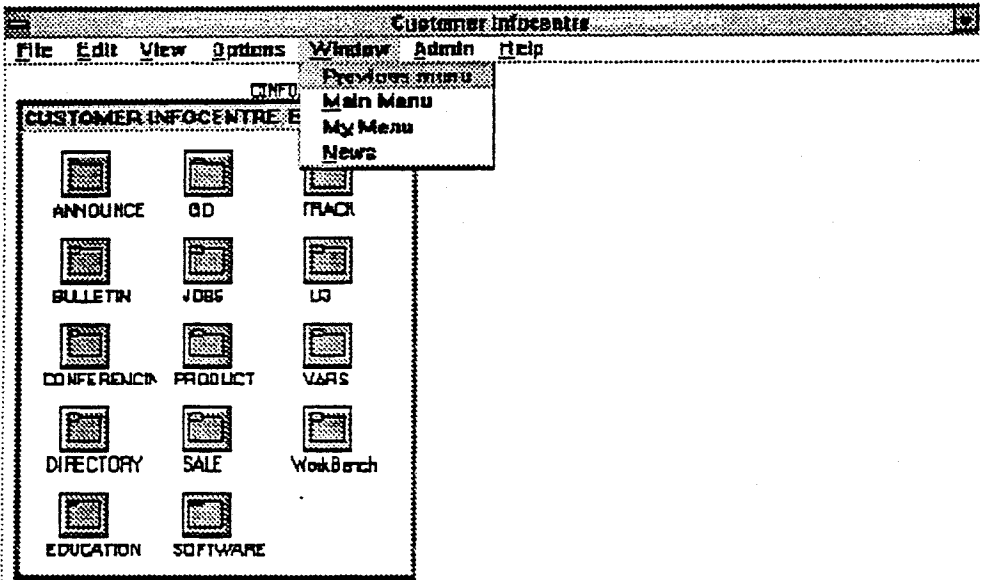


Figure 2-12 Options available under Window on the Menu Bar

Previous Menu

Displays the previous menu that the user accessed.

Main Menu

Displays the Main Menu for this application.

MyMenu

Displays the User's MyMenu.

News

Displays any new news items in the EIC

1 Unisys InfoCentre Electronic Centre

All previously selected menu titles are listed and any one may be selected.

2.4.7 Admin Pull-down Menu - System Maintenance

The Admin pull-down menu provides the facilities for maintaining the system, updating system tables, maintaining user registration, and producing management reports.

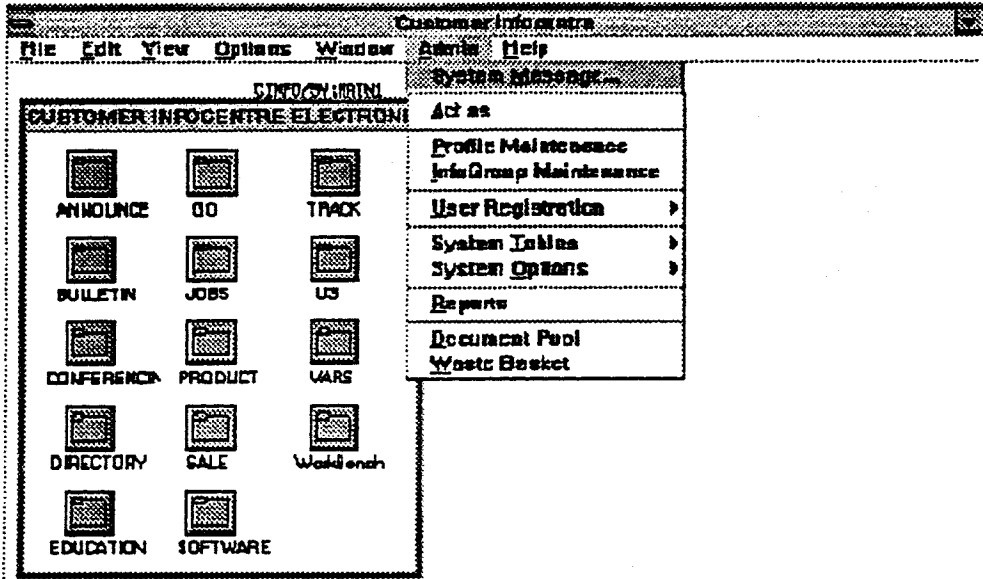


Figure 2-13 Options available under Admin on the Menu Bar

System Message...

Enables the administrator to enter a message which will be displayed to all Users under the News menu bar option.

Act As...

Enables the Administrator to act as some other user by changing to that user's User-ID.

Profile Maintenance

Enables the administrator to add, modify or remove profiles on the Profile table.

InfoGroup Maintenance

Enables the administrator to add, modify or remove InfoGroups on the InfoGroup table.

User Registration

Provides access to the user registration functions of add, modify or delete user details, and the account and Application Maintenance functions through the menu.

- >1 Add, Modify Details
- 2 Account, Application

System Tables

Provides update facilities for the tables listed in the cascading Menu.

- >1 Cost Centre
- 2 Organisation
- 3 Distribution List
- 4 Spawning Menus
- 5 Remote Users
- 6 Admin Contact Info

System Options

1 Date Format

Allows the User to select a new date format from the date formats displayed in the cascading menu.

- >1 Date format >1 YY.MM.DD
- 2 DD-MM-YY
- 3 MM/DD/YY
- 4 YYMMDD
- 5 DDMMYY
- 6 MMDDYY

2 Language

Allows the User to select a new language from the Language displayed on the cascading menu...

- 2 Language > English

Reports

Provides access to management reports on user profiles, resource utilisation, and operations.

Document Pool

Displays the Document Pool menu. The document pool is a holding area for menus, documents, forms etc received into the system but not yet assigned to an InfoGroup.

Waste Basket

Displays the contents of the wastebasket for a specified InfoGroup. Wastebasket contains documents, bulletins etc retired from the active menus.

2.4.8 HELP Pull-down Menu - The System Help Area

The Help pull-down menu allows the User to gain access to the various Help and assistance areas established in EIC.

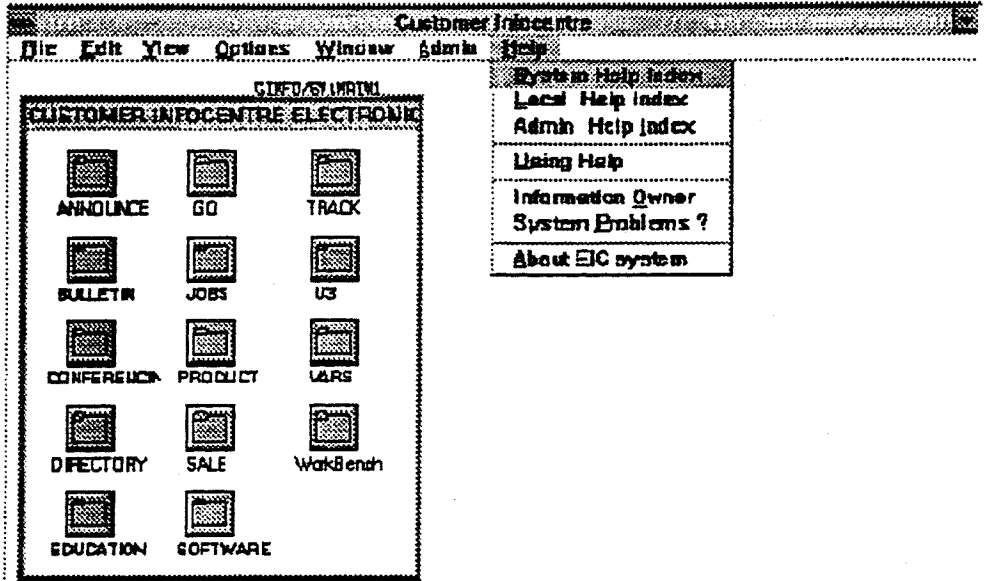


Figure 2-14 Options available under Help on the Menu Bar

System Help Index

Index and access to System help documentation.

Local Help Index

This is local application specific.

Admin Help Index

Index and access to Administration help documentation.

Using Help

Displays information about using the EIC help system.

Information Owner

Information about the owner of the current screen.

System Problems

How to report system problems/gain assistance.

About EIC System

General information about your system details.

2.5 Marking a Menu Item

For some actions, you need to nominate the item or document that you want the action taken on. This is called marking.

You mark the item and then initiate the action.

To mark an item:

1. Display the menu that lists the item;
2. Select Mark from the Edit pull-down menu;
3. Move the pointer to the description area of the item to be marked and click once (press the first button on the mouse).

The marked item is highlighted.

To mark a number of individual items at the same time:

1. Mark the first using the pointer and click;
2. Move the pointer to the next;
3. Mark that one, repeat the process as required.

2.6 Unmarking a Menu Item

Move the pointer to the item to be unmarked;

Click once to unmark a marked item.

2.7 Using the Scroll Bar

Scroll bars may appear to the right of a window and at the end of a window. You can use the scroll bars to scroll through a long list or a long document, and to shift your view to the left or right.

Scroll bars contain arrows at either end.

- Move the pointer to the arrow pointing in the direction required and click.
- Click once to move one line (or one row if horizontal scroll bar) or hold the mouse button down to scroll continuously.

Scroll bars contain a scroll box. This can be used to move to a particular part of a document. Move the pointer to the scroll box, click once and holding down the mouse button, drag the scroll box to the required position on the scroll bar and release the mouse button. The document is now displayed at a section (vertical or horizontal) corresponding to the position of the scroll box on the scroll bar.

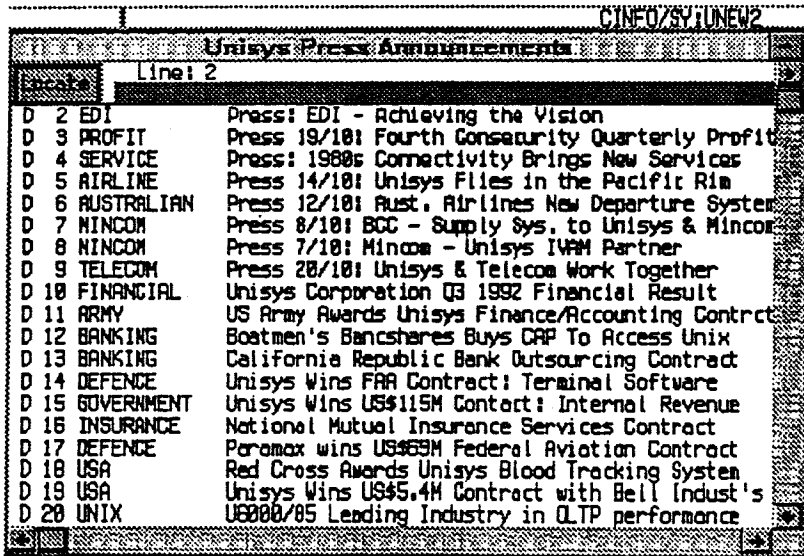


Figure 2-15 Scroll Bars

2.8 Searching for Information - the View FIND Command

When new information is inserted in the EIC system, the Information Provider may optionally insert the document in the News list (accessed by News on the Window pull-down menu) as well as being indexed under the targeted menu.

News items would typically stay in the system for 60 days (retention periods are established for each menu screen by the System Administrator) and within the system for a maximum of two years. Apart from looking for general information in News, you will often want to look up:

- Information about a particular subject. Enter an appropriate keyword.
- Information that was created by a particular person (this is the person's MAPPER user-ID, not their surname).
- Information that was created around a particular date range.

EIC lets you search for information using any of these criteria or a combination of them. If your first search finds 40 documents, but can only display 20, you can use scroll to roll to the next document. In most cases you will only search using keywords. For each document, the keywords - up to 25 - are checked to see if they match the one you entered.

The screenshot shows a window titled "Find" with a dotted border. Inside, the text "Enter your search parameter(s)." is followed by four input fields. The first is "Keyword" with a shaded text box. The second is "Created by User-id" with an empty text box. The third is "Creation date range (YYMMDD) ..." with two empty boxes and the word "thru" between them. The fourth is "Item no. to start scan" with an empty text box. At the bottom, there are three buttons: "OK", "Cancel", and "Keyword List".

Figure 2-16 The Find Window

To search for information

1. Select Find from the View pull-down menu on the Menu Bar.
2. Enter your search criteria and press XMIT, or click on the OK button.

2.9 Finding the Correct Keyword

If you don't know which keyword you want to use, click on the Keyword List button to display a list of valid keywords like the one that follows:

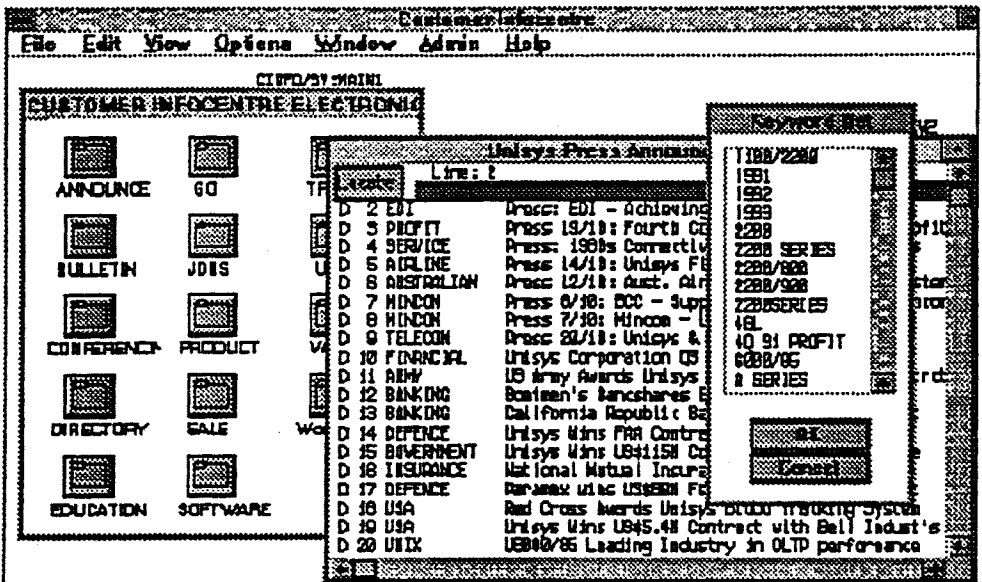


Figure 2-17 List of Valid Keywords

This list of keywords can be displayed at any time by selecting Keyword List from the View pull-down. Once you have found the keyword you want, move the pointer to it then click or press TRANSMIT. You will then be presented with a Menu list of all documents registered as having that keyword. You may repeat the process to narrow down the document list.

2.10 Special Facilities

2.10.1 MyMenu

This is your personal menu. Documents or menus that you commonly use can be added to MyMenu making access to them quicker. Note that you cannot add an external application - these can only be accessed via a system menu.

You can delete items from your MyMenu that you no longer use.

2.10.2 Switching Between MyMenu and Other Menus

MyMenu is available from the Window pull-down on the menu bar.

- Select Window from the menu bar.
- Move the pointer to MyMenu and click. Your MyMenu will be displayed.
- Use the Window pull-down to move from MyMenu to another menu or go back to previous menu.

2.10.3 How to Add an Item to MyMenu

An individual item or group of items may be added to MyMenu. These may be menu entries, documents or application links. You may not copy individual conference items or items from the main menu on your MyMenu screen.

When items are added to MyMenu (that is by marking them at the menu screen level), all keywords, security characteristics and summary information is automatically moved with the marked items.

Adding to MyMenu from the Menu Screen Level

1. Move to the menu screen of interest;
2. Go to the File pull-down menu;
3. Select Add to MyMenu;
4. Mark the items required and click on the OK button.

All selected items will be copied to your MyMenu.

2.10.4 To Delete an Item from MyMenu

1. Select MyMenu from the Window pull-down menu;
2. Select Mark from the Edit pull-down menu;
3. Mark the item(s) to be deleted;
4. Click on the Delete button;
5. A confirmation box will be displayed. To delete the item click on YES

The marked items will be deleted.

2.10.5 What's New

This facility is simply to let you know what information has been released to the EIC system and is available on the Window pull-down menu.

- Select Window
- Select News

You can use the Find option (under View on the Menu Bar) to list all news items with a particular keyword. If you find a document that you want to "keep", you can copy it to your MyMenu.

If any system messages exist which have not been previously displayed to you, then these will be displayed in a message box when you select news.

2.10.6 NotePad

NotePad is a work area for compiling your own notes to send to associates using electronic mail.

Each user has one NotePad "document". Whenever you select NotePad from the File list on the Menu Bar, your NotePad is displayed. It will contain the same information that you entered prior to your last save of the document.

NOTE

NotePad notes cannot be added to MyMenu.

2.10.7 To Create a NotePad Document

1. Select NotePad from the File pull-down on the Menu Bar.

A screen like the one below is displayed showing your NotePad. The first time you access NotePad it will be blank; otherwise it will contain the last notes you created.

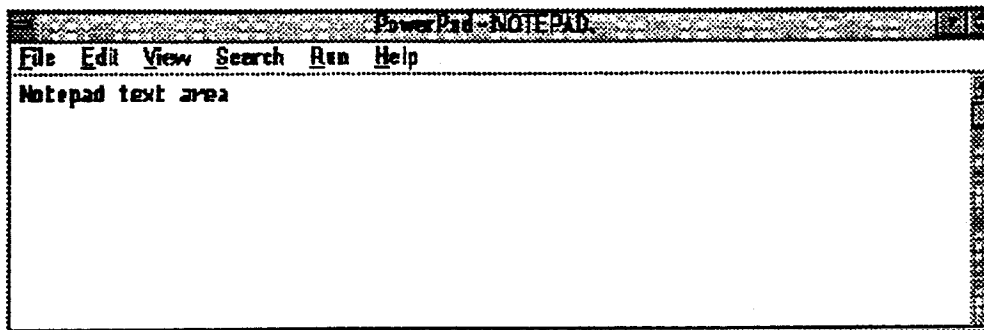


Figure 2-18 NotePad Showing the File Options

Any data may be entered directly on to the screen. Use the Menu Bar options to manipulate text.

NotePad Menu Bar Options

File Pull-down Menu

New	Open a new NotePad file.
Open	Open an existing NotePad file.
Merge	Add one NotePad file to another.
Save	Save the NotePad on display in a file.
Save as	Save a file as another file.
Preferences	Change default file settings.
Print	Print a NotePad file.
Page setup	Change default page settings for printing.
Printer setup	Change default printer setup.
Exit	Exit NotePad.

Edit Pull-down Menu

Undo	Undo the last change made to the document.
Cut	Cut the marked lines from the document.
Copy	Copy the marked lines from the document.
Paste	Paste the cut to copied lines into the document.
Delete	Delete the marked lines from the document.
Select All	Mark all lines in the document.

View Pull-down Menu

Tabs	Set the number of rows for tab insertion.
Wordwrap	Set the flag for text to wrap around the screen.

Search Pull-down Menu

Find	Find first occurrence of a string of data.
Repeat Find	Find next occurrence of a string of data.
Change	Change a string of data to some other string of data.
Goto line	Go to a specified line number

Run Pull-down Menu

Options	Enter or change a program name and the Windows command to call a program.
(run name)	Any program name entered in options will then appear on the Run pull-down menu and may be initiated by selecting it

Help Pull-down Menu

Index	An index of the NotePad help available.
Keyboard	A description of the function of keyboard keys in NotePad.
Commands	A description of the commands available in NotePad.
Procedures	A description of the procedures to use in NotePad.
Using Help	An explanation on how to use NotePad help.
About PowerPad	Information about this version of NotePad.

2.10.8 Managing the NotePad Document

When you call NotePad your existing NotePad area is displayed.

Enter Text/Data as required . Use the actions in the Edit pull-down to move data around the document Use the pointer to mark data lines. Marked lines may be cut or copied or deleted.

To Move text to another location

1. Mark the lines to be cut/copied.
2. Select Cut or Copy from the Edit pull-down - Cut moves the lines to the new location, copy duplicates the lines at the new location.
3. Mark to line where you want to insert the lines.
4. Select Paste from the Edit pull-down menu.

To Delete text from the NotePad

1. Using the Pointer Mark the lines to be deleted.
2. Select Delete from the Edit pull-down.

NOTE

You cannot delete a NotePad.

Saving changes to NotePad

When you have finished updating the document select Exit from the File pull-down menu. If the NotePad document has been changed a Save confirmation screen is displayed. Click on Yes to save any changes.

While a user has one NotePad "document" on the EIC system, you may use the New, Open and Save As function on NotePad to open a separate NotePad or save a copy of NotePad as a file on your workstation.

2.11 Help

On line help for the EIC system is available under the Help pull-down on the Menu Bar.

The Help pull-down menu is available throughout the EIC system.

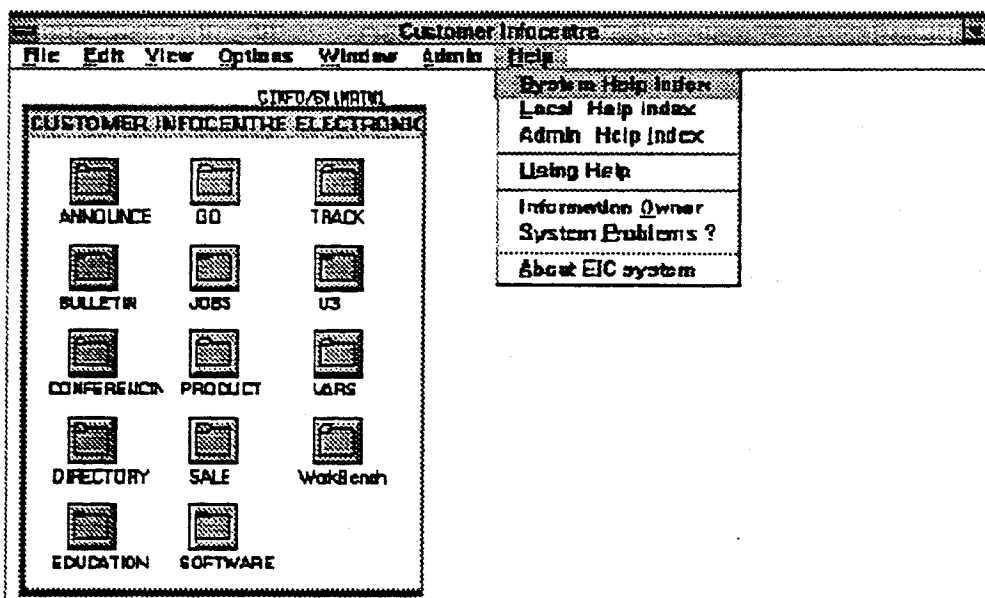


Figure 2-19 Help Pull-down - EIC Help

Options available on the Help pull-down menu

Index

Provides an index to the System, Local and Admin help

System

Provides help information on various functions in the EIC system - eg MyMenu or News . The topics available are displayed in a list box from which you may select one using the pointer.

Local

Provides help information on various local applications available on your EIC system. The topics available are displayed in a list box from which you may select one using the pointer.

Admin

Provides help information on various Administrator functions available on the EIC system. The topics available are displayed in a list box from which you may select one using the pointer.

Information Owner

This is the name and telephone number of the information owner, that is the person responsible for this area of EIC or the person who actually provided the information.

System Problems

Provides the names and phone numbers of the people to contact if you need assistance.

About EIC System

Current user-ID, name and telephone number, current run name, version, remote site-ID and language.

2.12 Print

Menus or documents may be printed on your local printer. Menus may first have to be downloaded to your workstation using the Download option.

1. Select Print on the File pull-down menu. If there is no Print option select Download and then repeat step 1.
2. Printing will now be initiated. A message will be displayed showing the destination printer. You can cancel the print process by clicking on the Cancel button.

2.13 Mail

Menus or documents may be mailed to a mail box.

- 1 Select Mail on the File pull-down menu.

The screenshot shows a window titled "Mail" with the following elements:

- Sender:** A text box containing "DEMONSTRATION".
- Subject:** An empty text box.
- Priority ? :** A dropdown menu showing "N", followed by "Y or N".
- TO / Dir-id:** A table with 5 rows and 2 columns. Each row has a slash "/" between the two columns.
- COPY / Dir-id:** A table with 5 rows and 2 columns. Each row has a slash "/" between the two columns.
- TO LIST:** A label above an empty text box.
- COPY LIST:** A label above an empty text box.
- Buttons:** "OK" and "Cancel" buttons in the top right corner.

Figure 2-20 Electronic Mail Input Screen

- 2 On the input screen displayed enter Sender, Subject, Priority, To (dir-id) or To (list) and optionally Copy(dir-id) or Copy (list).
- 3 Click on OK. When mailing is complete you will be returned to the menu or document.

2.14 Download

Menus or documents may be downloaded to your workstation.

- Select Download on the File pull-down menu.

The downloaded document will be displayed. You may now save the document as a file on your workstation by using the Save or Save as action on the File pull-down menu.

Section 3

Information Management

3.1 Management Policy on Information Distribution

As a general rule, information in EIC is available to all users. Restrictions on information distribution is determined by information providers, and by management. As an Administrator, it is your responsibility to implement those policies through the use of profiles and keywords.

3.1.1 Distribution Channels for Corporate Information

You will need to identify your main information providers and set up menus that reflect the type of information they will be submitting, but also to reflect the way in which it will be accessed by users.

For example, product announcements and press releases issued by the marketing department may be attached to the main menu under their respective titles. However, users may only be interested in announcements that are relevant to particular products or topics.

You will need to make sure that the information providers are aware of this fact and that they attach keywords that are meaningful for product/topic oriented users.

3.2 Where the Information Comes From

3.2.1 Submissions From Local Sources

Information providers working on your local system will create documents and add them directly to the system. You need to make sure they fully understand the structure of the menus and you may need to inspect their initial submissions.

3.2.2 Submissions From Remote Sources

Information providers working on remote systems will have a MAPPER utility for creating documents and attaching appropriate keywords. They will then have to assign it to a screen number within your system. Each screen or document is assigned a unique identification number in the following format:

EIC/SY:22PM1

Where:

EIC/SY equates to the unique EIC system identifier
(Network System - ID).

22PM1 is the unique screen or document number.

Information providers may be submitting documents to a number of EIC systems, each with its own menu structure, and they need to keep a list of the correct screen numbers for each.

Two types of information providers may exist in your organisation.

- 'Trusted' providers who are known to the home system administrator and who may be given the right to send documents to their own screens without administrator examination.
- 'Non-trusted' in the sense that they may be general users or outside the direct supervision of the local system administrator.

Documents submitted from a 'non-trusted' source must be 'vetted' by an InfoGroup Administrator.

3.2.3 Procedure for Reviewing Remote Submissions

In the standard EIC system deliverable, a Document Pool capability is provided so that any document sent to the EIC application by a non-trusted Information Provider will be trapped for examination by the System Administrator. This would be especially applicable to general documents routinely sent to a distribution list.

Access to the Document Pool menu is achieved via the Admin pull-down menu.

In this implementation, once the Administrator has determined that the document is acceptable, it is placed in the appropriate menu area by using the Mark and Copy functions.

3.3 Other Information Sources

3.3.1 File Imports

Files may be imported into EIC from a remote site, by you or an information provider. These files can be unformatted ASCII text files, MAPPER graphic files, or host-specific data files. See "Import" in the Administrator's Reference Manual for details.

An example of this is chart runs which are managed externally but supply data to EIC for display.

3.4 Where the Information Goes To

EIC information can be output in the following ways:

- By printing;
- By the screen;
- Through electronic mail;
- By facsimile;
- By exporting to the local system via MAPPER;
- By exporting to the host system;
- Downloading to a local terminal (host system dependent).

3.4.1 The Screen

The most common form of output is the terminal or workstation display.

3.4.2 Electronic Mail

In the standard EIC application, documents from EIC may be sent to any destination supporting MAPPER electronic mail. Some installations may have other electronic mail systems, so detailed procedures are not contained in this manual, but left to you to arrange with your MAPPER co-ordinator.

You can then document these details and advise users in a Help document.

3.4.3 Facsimile

If the facility is implemented EIC documents may be sent as a facsimile. Discuss your sites procedures and advise users.

3.4.4 Exporting to Workstation

Any document within EIC may be exported to your Workstation by using the "Save As" option in the File pull-down on the Menu Bar. This function is only available when the document to be exported is displayed on the screen. If the "Save As" function is not available (e.g. when the document is a menu) use "Download" on the File pull-down menu to initially download the document on to the screen.

"Save As" saves the document on a file on your workstation.

When exporting, EIC keeps no references to the fact that the information has been exported.

3.5 Where the Information is Stored

Usually, EIC data is stored on the local host machine. When several sites run EIC and share their data, data viewed from a terminal connected to a local host may be stored on a remote host. This issue is unimportant to the user, but you should be aware of it, as it will have a major bearing on storage requirements.

Refer your queries to your MAPPER co-ordinator.

3.6 MAPPER - What you Need to Know to Manage EIC

You do not need to have a deep understanding of MAPPER in order to manage EIC effectively. However, functions such as creating forms require a knowledge of MAPPER reserved words such as TIME\$, DATE\$, USER\$ etc. These reserved words are covered briefly in this guide in the section "Creating forms". You can find a full reference to them in the MAPPER documentation.

Section 4

Setting up the System

4.1 EIC System Sizing Guidelines

Limitation of Total Menu Items

System

No system limitation on the total number of menu items. The system administrator may assign maximum growth constraints for any particular menu.

InfoGroup

System Administrator defines how many menu items may be assigned within an InfoGroup - up to 99,999 items.

Menu

The InfoGroup owner (defined by the EIC System Administrator) or the EIC Administrator defines the maximum number of items allowed for each menu within the InfoGroup.

The total number of menu items is counted as RESERVED for each menu. Total of RESERVED items cannot exceed the preset limit for the InfoGroup.

Database

A MAPPER Drawer cannot exceed 2,000 reports. Multiple Drawers may be assigned for the User database, should the area required exceed the capacity of a single Drawer.

EIC System Runs and Tables

- Number of Cabinets required	-	One
- Drawer descriptions	Drawer	Record Length
-----	-----	-----
System Screens	F	80
System Tables	G	80
System Help Docs.	H	80
System Runs	I	80

User Database

There are nine (9) database types within EIC, with each database having one or more MAPPER Drawers. Alternatively, one MAPPER Drawer may be assigned for multiple database types.

The Database types are:

- User Tables
- User Lists
- Menus
- Documents
- Forms
- Conference Area
- Bulletin Board
- NotePad
- Graphics
- History
- Workarea
- Binary Files

User Tables

Record length = 80 characters.

Two (2) new reports (Index Table & Wastebasket) are created for each new InfoGroup.

The first twenty (20) reports are reserved by the system (InfoGroup registration, User registration, User Profiles, etc.).

User Lists

The User List contains a User's detailed information such as User Profile, InfoGroup accesses, User defined colour scheme, Application environments, etc).

Multiple access drawers may be required if the number of Users exceeds 2,000.

Record length = 80 characters.

Number of MAPPER reports equals the number of Users.

One (1) new MAPPER report is created in this drawer and two (2) in another drawer for every new User registered. (NotePad in User NotePad drawer and MyMenu in User Menu drawer).

Menus

Record length = 100 characters.

Number of reports = number of menus + number of Users (MyMenu).

One (1) new report is created for every new menu.

Multiple drawers may be required if there are more than 2,000 menus established in the system.

Documents

Record length = varies according to site needs (80 - 256 characters).

Number of reports = Number of Documents.

One (1) new report is created for each NEW document in the system.

Separate MAPPER Drawer(s) can be assigned for the following situation where a document is created by the EIC IMPORT or by the external CREATEDOC functions.

Maximum and Minimum number of lines for a Drawer (e.g. 0-500,501-2001,2001-10,000).

Maximum and Minimum width - i.e. Number of characters (e.g. 0-80, 81-132)

Forms

Record length = 80 characters.

Number of MAPPER reports = Number of pre-defined forms.

It is recommended that one of the Drawers assigned for Documents be used if only a few forms are required. (A Drawer of 80 characters and less than 500 lines is recommended.)

Conference Area

Record length = 100 characters.

Menu, Conference area and Bulletin Board are treated as a menu and have the same report format. This means that all menu types can share the same Drawer.

It is recommended that one of the Drawers assigned for Menus be used if only a few Conference areas are to be utilised.

Bulletin Board

Record length = 100 characters.

Menu, Conference area and Bulletin Board are treated as a menu and have the same report format. This means that all menu types can share the same Drawer.

It is recommended that one of the Drawers assigned for Menus be used if only a few Conference areas are to be utilised.

NotePad

Record length = 80 characters.

One (1) new MAPPER report is created in this drawer for each new User. Multiple MAPPER Drawers are required if the number of Users exceeds 2,000.

Graphics

Record length = 80 characters.

MAPPER Graphics code is stored in this drawer.

History

Contains a history of EIC system usage.

Record length = 80 characters.

Number of reports = 62.

Workarea

Used as a holding area for documents being updated manually.

Record length = 80 or 132 characters (two Drawers required) .

Number of Mapper reports = one per document.

Binary Files

Used to hold user defined Designer Workbench Icons.

Record length = 132 characters.

Number of Mapper reports = As required by users.

Example Database Configuration

```

.e      User's Drawer List
*Drawer Description      Drw Typ Min Max Min Max Max
*                        Cpl Cpl Lines Lines Rept
=====
User Tables              d042 TAB 0 000 N/A N/A 2000
User List                c042 ULS 0 000 N/A N/A 2000
User Menus              d042 MEN 0 000 N/A N/A 2000
User Conference Area    d042 ARE 0 000 N/A N/A 2000
User Bulletin Board     d042 BUL 0 000 N/A N/A 2000
User Conference         e042 CON 0 000 0 20000 2000
User Documents          00 e042 DOC 0 000 0 20000 2000
User Documents          132 i042 DOC 001 132 0 20000 2000
User Forms              00 e042 FOR 0 000 0 20000 2000
User Graphics           00 e042 GRA 0 132 0 20000 2000
User Binary files       132 i042 LKS 0 132 0 20000 2000
User NotePad           00 e042 PAD 0 000 0 20000 2000
User Work Area         00 b020 WRK 0 000 0 20000 2000
User Work Area         132 c020 WRK 001 132 0 20000 2000
..... END REPORT .....

1Resume 2Paint 3      4Return 5      6Tasks 7View 8Help
=====

```

Figure 4-1 Example Database Configuration

NOTE

Maximum Reports Size.

It is recommended that this limit be set to 90% of the MAPPER limit for the maximum allowable number of reports. This is to allow for storage of updated copies.

4.2 Creating System Entities

The following procedure creates your system entities (InfoGroups, users, etc):

Basically, you need to:

1. Enter organisation codes;
2. Enter cost centre codes;

Organisations and cost centre codes must be established before you can create InfoGroups;

3. Enter Profile Keywords;

Profiles must be created before you can create users and information providers.

4. Enter details of information providers;
5. Create InfoGroups;
6. Enter details of users with high profiles (other users can create their own user records).

To establish these entities, use the options available under Admin on the Menu Bar.

After these entities are created, you need to create menus and load documents, etc. These procedures are discussed later in this section.

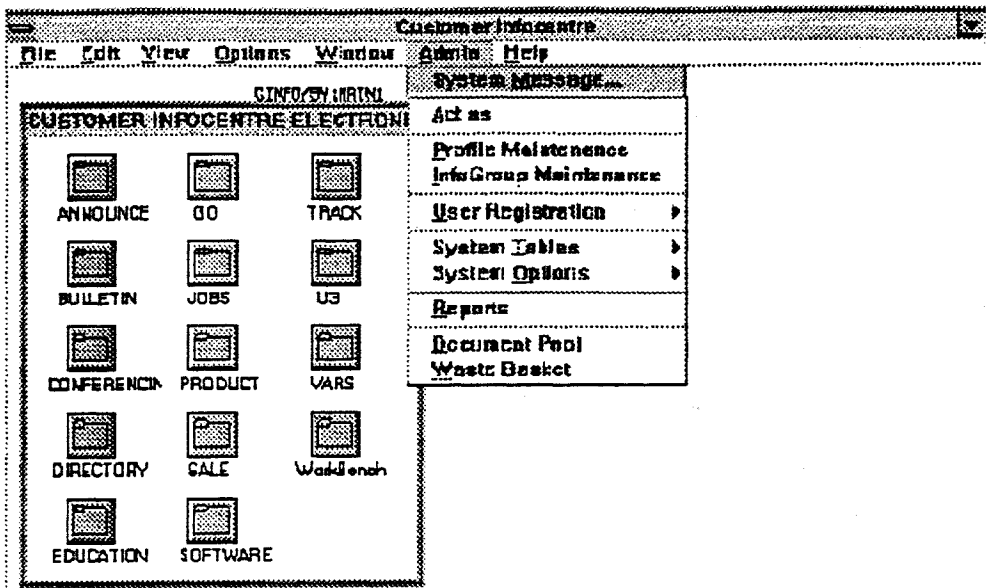


Figure 4-2 Administrator's Pull-down Menu

4.2.1 Organisation Codes

You must register at least one organisation code. Organisation codes are used to produce management reports for monitoring such things as system usage. You can use these reports to determine how often documents are created, how often they are accessed, what storage capacity is being used and what may be required in future.

For installations that provide services for a single organisation, you only need to create one organisation record.

To Enter an Organisation Code:

1. Choose System Tables from the Admin pull-down menu.
2. From the cascading menu displayed select Organisation.

A screen like the one below is displayed. The instructions are listed at the end of the screen.

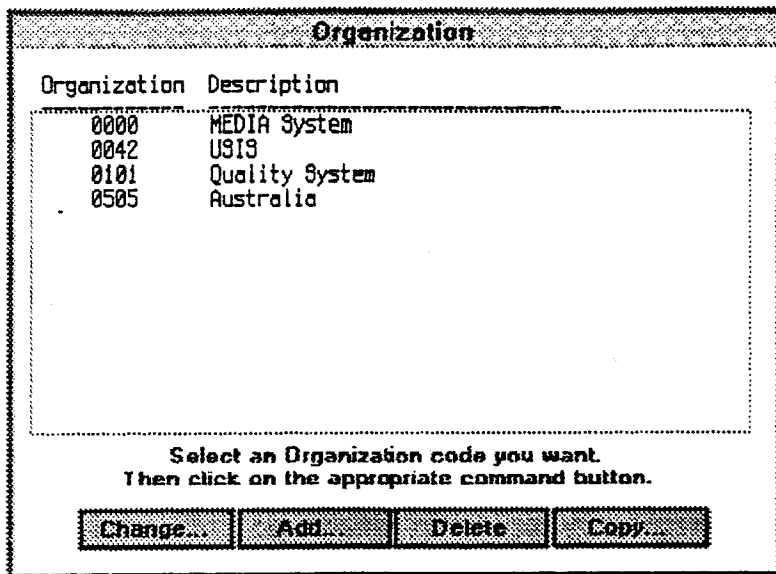


Figure 4-3 Organisation Codes Screen

3. Click on the Add button to add a new Organisation Code.
4. A window is displayed in which you enter the new Organisation Code & Description.

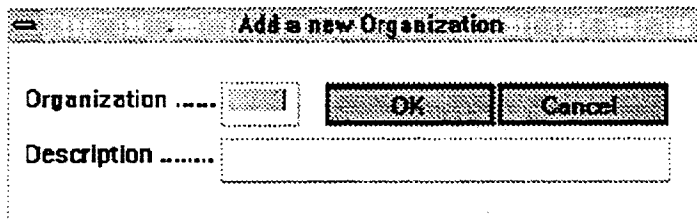


Figure 4-4 Add Organisation Window

5. Enter the code you want to use and the name of the organisation;
6. Click on the OK button or press XMIT.
7. Use Exit on the File pull-down to return to the menu.

4.2.2 Cost Centre Codes

Cost Centre Codes are used in management reporting so you can determine which departments are providing information to the system, which departments are using the system, how much storage they use/require, and how much processing time they use.

Cost Centre Codes should be assigned to coincide with the cost centres of your organisation. You can refine them at a later date.

To Enter Cost Centre Codes

1. Choose System Tables from the Admin pull-down menu.
2. From the cascading menu displayed, select Cost Centre.

A screen like the one below is displayed, listing the registered Cost Centres.

Cost Centre		
Organization	Cost Centre	Description
0000	0000	MEDIA System
0042	0000	ISIS
0101	0000	Quality System
0505	0010	PACE

Select a Cost Centre code you want.
Then click on the appropriate command button.

Change...	Add...	Delete	Copy...
-----------	--------	--------	---------

Figure 4-5 Cost Codes Screen

3. Click on the Add button to add a new Cost Centre code. A window is displayed in which you enter the new centre's details.

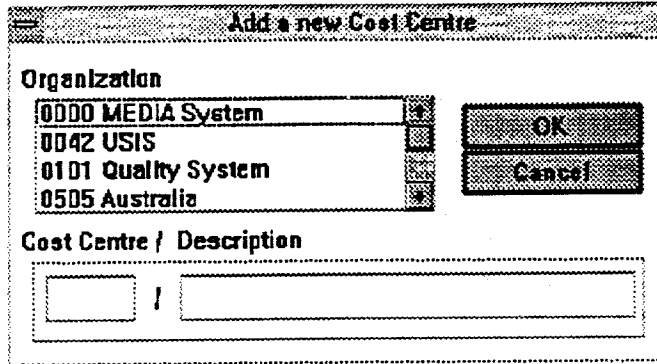


Figure 4-6 The Add Cost Centre Window

4. Select an Organisation Code from the List Box and enter Cost Centre Code and description.
5. Click on the OK button or press XMIT.

4.2.3 Admin Contact Information

Use the Admin Contact Info option on the System Tables cascading menu to enter contact information.

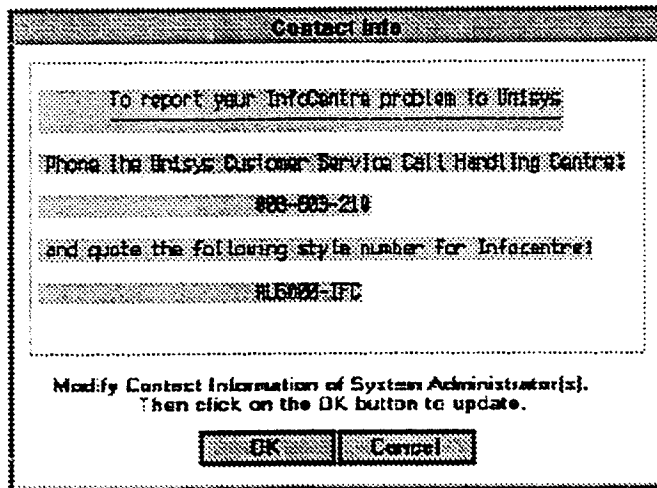


Figure 4-7 Admin Contact Information Screen

You should enter relevant details so that anyone using EIC is able to contact you about problems that they might be experiencing.

When you have set up the data structures within EIC and the system has become stable, you may wish to amend this screen so that there is a selection of people to contact depending on the general nature of the help required.

Under Information Owner in the Help pull-down menu list is the name of the Information Provider for the current item and how to contact them for further information about that menu item.

4.2.4 Setting up Profiles

Profiles are assigned to users as a means of establishing security of access to information.

When a document is created, a list of profiles is attached that determines which users can access it. Up to 36 profiles can be attached to a document.

For general access to a menu screen, leave the menu security table empty (no profiles).

Users can be given a number of profiles to reflect their responsibilities across the organisation.

Profiles can be "built" into a hierarchy to reflect the structure of your organisation. Each profile can have a parent to which it belongs. This organisation - using parent profiles - is only to help you in creating different levels. Profiles are mutually exclusive. A "high level" profile does not give access to a profile that has a "lower level" in the structure. A user can only access a document that has a matching profile.

If the Sales Department has one general manager, three group managers and a number of sales personnel within each group, you can create profiles as follows:

- S-MGT, for the Sales General Manager.
- S-GRPA, S-GRPB, S-GRPC for Group Managers.
- S-SALES for General Sales Personnel

Depending on who you want to have access to the document, you can assign appropriate profile keywords.

To Create Profiles

Initially, you can

1. Select Profile Maintenance from the Admin pull-down menu;

A screen like the one below is displayed, which lists the existing profiles. Instructions are displayed at the end of the screen.

Profiles		
Profile	Parent Profile	Description
ADMIN		InfoCentre Administrator
AUSTRALIA		Unisys Australia
BILLTEST	acus	test profile
PUBLIC		Customer - Public
SERVICE		Customer - Service
SERVICE-MF	SERVICE	Service - Mainframe
U-CS	Australia	Unisys Customer Service
U-MKTG	Australia	Unisys SPMG
U-SALES	Australia	Unisys Sales Force
U3		U3 Group
U3-2200	U3	U3-2200
U3-4GL	U3	U3-4GL
U3-ASERIES	U3	U3-Aseries
U3-EXEC	U3	U3 Executive
U3-MICRO	U3	U3-Microproduct
U3-OPERATION	U3	U3-Operations
U3-UNIX/PC	U3	U3-UNIX/PC

Select a profile code you want.
Then click on the appropriate command button.

Change... Add... Delete... Copy...

Figure 4-8 The Profile Maintenance Screen

2. Click on the Add button to add a new profile. The Add profile window is displayed.

Add a new Profile		
Profile code	<input type="text"/>	<input type="button" value="OK"/> <input type="button" value="Cancel"/>
Parent Profile	<input type="text"/>	
Description	<input type="text"/>	

Figure 4-9 The Add Profile Window is Displayed

3. Enter the profile name and the parent profile (if there is one) and a description of the profile group.
4. Press XMIT.

4.2.5 Setting up Information Providers

Information Providers, as part of an InfoGroup, will create documents that can be entered to the system. Information Providers are the same as any other user when they are accessing information outside their InfoGroup.

To create Information Providers, simply register them as users. When you create the InfoGroup to which they belong you enter their User-ID. Refer to the section on Registering a User for detailed instructions.

4.2.6 Setting up InfoGroups

InfoGroups are established for three reasons:

- To help you organise your information sources, e.g. a sales department with three product groups should correspond to four InfoGroups.
- To assign responsibility for the information provided, e.g. each InfoGroup has an information owner.
- To relate menu items to information providers. Generally speaking each menu item relates to a corresponding InfoGroup.

The later point is not always true. You could have a Product Announcements menu item that belonged to the Sales InfoGroup as well as a Latest Product Sales Report menu item that also belonged to the same group.

To Create an InfoGroup

1. Select InfoGroup Maintenance from the Admin pull-down menu. A screen like the following one is displayed.

InfoGroups						
InfoGroup	Pre Fix	Description	Orga Code	Cost Code	Owner	Dept
BOARD	BOAR	Bulletin Board	0505.0684	DEMO		371
Bulletin	BULL	Bulletin Area	0505.0684	DEMO		371
CALENDAR	CALL	Calendar	0505.0684	DEMO		371
CONF	CON-	Conferencing	0505.0684	DEMO		371
Conference	CONF	Conference Area	0505.0684	DEMO		371
DEMO	DEMO	test info group	0505.0810	DEMO		30
DOCUMENTPOOL	POOL	ADMIN DOCUMENT POOL	0505.0684	DEMO		371
Guide	GUID	User Guide	0505.0684	DEMO		371
HELP	HELP	Local system help	0000.0000	DEMO		371
INDEX	INDX	InfoCentre Index	0505.0684	DEMO		371
JOBS	JOBS	Positions Vacant	0505.0684	DEMO		371
MAIN	MAIN	Main Menu screen	0505.0884	DEMO		371
MKTG-COMMS	MCCC	Marketing	0505.0884	DEMO		371
MyMenu	MyMe	My menu screen	0505.0884	DEMO		371
News	NEWS	News & What's New	0505.0884	DEMO		371

Select an InfoGroup you want.
Then click on the appropriate command button.

Change... Add... Delete... Copy...

Figure 4-10 InfoGroup Maintenance Screen

NOTE

A user may own more than one InfoGroup.

- Click on the Add button to add a new group. The Add InfoGroup window is displayed.

The screenshot shows a dialog box titled "Add a new InfoGroup". It contains the following fields and buttons:

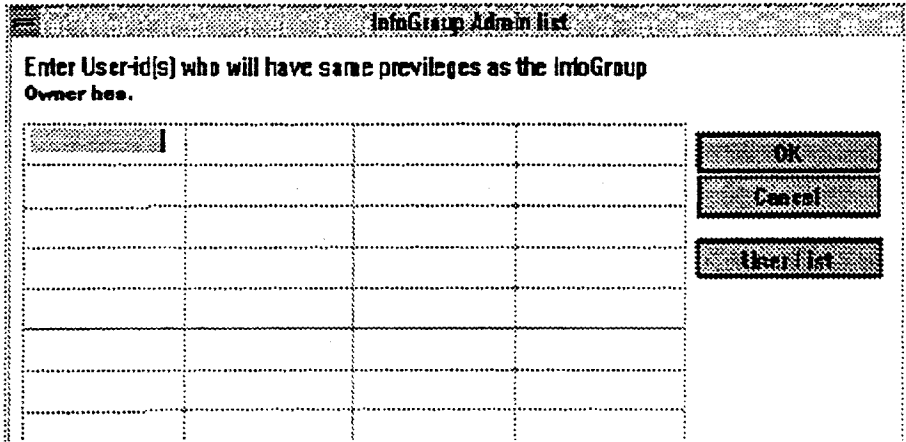
- InfoGroup-ID**: A text input field.
- Description**: A text input field.
- Owner's User-ID / Dept#**: Two text input fields separated by a slash.
- Organization / Cost Centre**: Two text input fields separated by a slash.
- Screen or Document Prefix**: A text input field.
- Limit of total menu Items**: A text input field.
- InfoGroup Admin list?**: A radio button with the letter "N" next to it.
- Buttons**: Four buttons at the bottom: "OK", "Cancel", "User List", and "Organization / Cost".

Figure 4-11 New InfoGroup Details

- Enter the name and description you want to attach to the InfoGroup.
- Enter MAPPER User-ID and department number of owner. Click on User List button to get valid User-IDs.
- Enter organisation & cost centre numbers for InfoGroup. Click on Organisation/Cost button to get valid input codes.
- Prefix - attached to front of screen or document numbers.
- Limit to total number of menu items (across all menu screens) in the InfoGroup.
- Add InfoGroup Admin List? - If "y", input screen for up to 36 alternate administrators is displayed.
- Click on the OK button or press XMIT.

Setting Up the System

In addition to the owner of the InfoGroup, you can assign up to 36 users as "assistants", who will also have read and write access to all of the contents of the InfoGroup.



The screenshot shows a dialog box titled "InfoGroup Admin list". Below the title bar, there is a text prompt: "Enter User-id(s) who will have same privileges as the InfoGroup Owner has." Below this prompt is a table with 4 columns and 7 rows. To the right of the table are three buttons: "OK", "Cancel", and "User list".

Figure 4-12 InfoGroup Administrators

4.2.7 Registering Users

The Registration Process

The registration process is split into two major functional areas.

- User registration in EIC
- Registration of users job accounts then account access to specific applications. (see Section 8 for application & account registration).

Registering Users

User Registration is achieved in two ways:

- User Self Registration
- Administrator Registration

Self Registration

While the EIC system expects every user to be registered, it is not intended that an administrator must do this for "public" or basic users.

A self registration capability is provided for "public" users of the system. The public user must provide the system with basic information on first calling the EIC system.

This "public" or base level user has a default profile attached to them.

```

.....
          CINF0/SY - Self Registration
-----
Please enter your personal details as a new user.
Then press the transmit key to register your User-ID.
-----
User-ID .....[DEMO      ]
Employee number .....[      ]
Organisation / Cost Centre ...[  ]/[  ] ** See NOTE below
Your Name .....[      ]
Phone number .....[      ]
E-Mail box number .....[      ]
-----
** Note: 1. If you don't know your ORGANISATION code,
           tab to the Organisation input field then press F5 (Prompt)

           2. If you don't know your COST CENTRE code,
           enter your ORGANISATION and tab to the cost centre
           input field then press F5 (Prompt).
-----
1      2      3Exit  4Refrsh 5Prompt 6      7      8      9      12Cancel
                                10

```

Figure 4-13 Self Registration Screen

NOTE

That each user must provide organisation and cost centre numbers. This is used for reporting purposes.

Administrator Registered Users

1. Select User Registration from the Admin pull-down menu. Select Add, Modify Details from the cascading menu. A screen like the one below is displayed, listing the existing users.

System Users							
User-Id	Dept	Orga Code	Cost Cntr	My Menu	AFGL DFPS MDP	Contact Name	Employment
DEMO	30	0505	0810	20	NNNN	DEMONSTRATION	600055
DUMMY5	0	0000	0000	20	NNNN	Self Registration	
DUMMY#0042	0	0042	0000	20	NNNN	SELF REG FOR 0042	DUMMY#0042
DUMMY#0505	0	0505	0010	20	NNNN	SELF REG FOR 0505	DUMMY#0505
GRILA	42	0042	0000	20	NNNN	Carl Grila	usis
HUERLMANN	12	0505	0810	20	NNNN	Bruno huerlimann	0
HUMPHRIES	1	0505	0810	20	YYYY	DEBBIE HUMPHRIES	268799
JINLEE	20	0505	0810	40	VVVV	Jin Y. Lee	usis
JINLEE	30	0505	0810	20	YYYY	Jinlee	600000
LIZZARDER	42	0042	0000	20	NNNN	Ray Lizzarder	usis
OWSLEY	42	0042	0000	20	NNNN	owsley	usis
PURNELL	20	0505	0810	40	YYYY	Kia Purnell	284335
SSCWB	1	0505	0810	40	VVVV	Julian Watts	
SHEP	20	0505	0810	40	YYYY	Jeongho Bae	
STEVENSON	20	0505	0810	20	VVVV	Alex Stevenson	604479
BULGROVE	42	0042	0000	20	NNNN	Lornie Bulgrove	usis
YAMA	42	0042	0000	20	NNNN	Tetsuo Yama	USIS

Select a system user you want.
Then click on the appropriate command button.

Change... Add... Delete... Copy... Profile...

Figure 4-14 User Registration Maintenance Screen

To add a new user, use Add to display a fresh input screen or use Copy to copy an existing user's details (the system comes with a "dummy" user set up). If you have users from the same department or in similar roles, copy one to set up the others.

2. If you want to Copy a user, use the pointer to mark the User-ID that you want to copy.
3. Click on Copy. The user details window is displayed showing the details that you copied. Or click on Add to display a new input screen.

Modify User details	
Mapper User-Id	DEMO
Department	30
Employee Number	600055
Organization / Cost Centre	0505 / 0810
Contact Name	DEMONSTRATION
Phone Number	
Mail Box	
Maximum Items In MyMenu ...	20
Function Control	
<input type="checkbox"/> System Administrator	<input type="checkbox"/> Profile Maintenance
<input type="checkbox"/> InfoGroup Maintenance	<input type="checkbox"/> User Registration
OK	Cancel
Organization / Cost Centre	

Figure 4-15 User Details Window

4. Change details as required. Make sure that you change the User-ID.
5. Click on the OK button or press XMIT.

Once you have recorded the user's details you need to set up the user's profile. The user profile (of the record you copied) is displayed. A blank input screen for user profile codes is displayed.

If you are not sure of the profile to be applied click on Profile list.

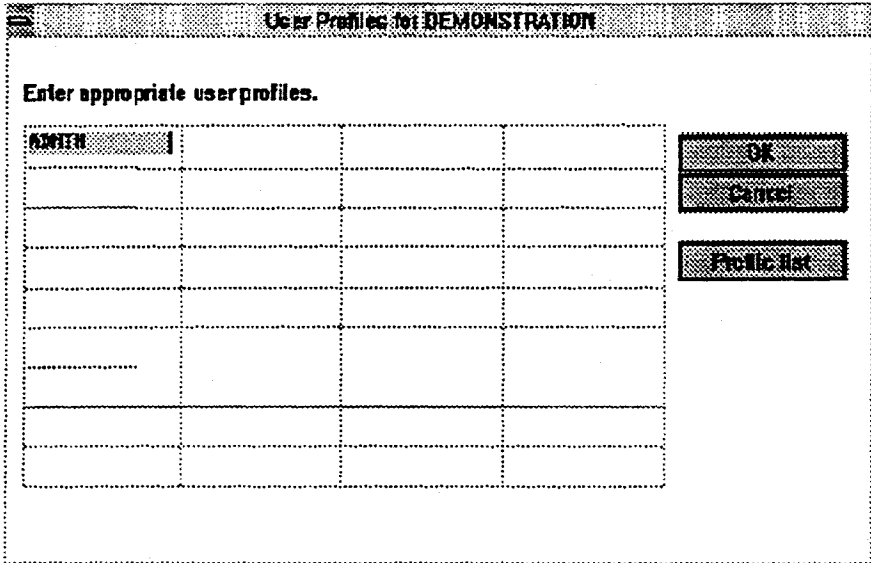


Figure 4-16 User Profiles Window

6. Enter the profiles required - up to 36. Use the Profile list button to display a list of valid profiles and make your selection from the list if required, by marking the profile(s) and selecting amend or replace.
7. Click on the OK button or press XMIT.

4.3 Setting Up a Menu Structure

4.3.1 Managing Menus

It is recommended that two separate sections be setup in the menu structure within EIC. They are the Index Section and the Organisation Section. These sections should both contain basically the same information, but differ in the way that information is organised, or structured.

In either of these sections, fast access menus may be set up which provide a quick method of accessing frequently referenced information which is stored deep within the menu structure.

4.3.2 The Index Section of the EIC Menus

The Index Section of EIC structures information according to the subject of the data. As changes are made to the InfoGroup database, you should make corresponding changes in the index menu.

Sub-menus within the Index Section of EIC should always be organised purely according to the subject of the information, but should only be detailed enough to make searching by subject as efficient as possible.

4.3.3 The Organisation Section of the EIC Menus

The Organisation Section of EIC should be structured in a way that reflects your organisation's structure. The top level of this menu should contain all of the independent organisations within your corporation.

As a System Administrator, you will probably be responsible for the way EIC runs for one or more of these organisations. Within each of the organisations for which you are responsible, you should set up a menu structure which matches its organisational structure. The purpose of structuring this way is so that information can be located based upon what part of the company it belongs to.

4.3.4 How the Two Sections are Related

In order that no duplication of data occurs, the two sections of the menu must be directly related, with no information present in one section absent in the other. This is done through a process of double reference.

What double reference means is that there are two references to every entity within the EIC menus. In this context, an entity can be an individual item, such as a single document or form, or a collection of items, such as a menu structure containing sub-menus, documents, applications, etc.

For each reference which you make to an entity from the index section, you must make a reference to the same entity from the organisation section.

The way that you divide up all of your information into entities is entirely dependant on the way that the structure of the index section can be related to the Organisation Section.

If the way your organisation is structured is similar to the way in which the information is structured, then the number of separate entities which must be double-referenced will be small.

If however, the way that your organisation is structured is very different to the way in which the information is structured, then the number of separate entities which must be double-referenced will be large.

4.3.5 Fast Access Menus

Once you have set up the menu structure, people will access information according to their individual needs. Often there will be a particular menu, document, or application which many people will access frequently. If this frequently accessed information is several levels deep inside the menu structure, you can improve the useability of EIC by adding fast access menus to the menu structure. You can create fast access menus by making a sub-menu which refers to an already existing menu.

4.3.6 Example Structures

The following screens show an example structure following the approach just outlined.

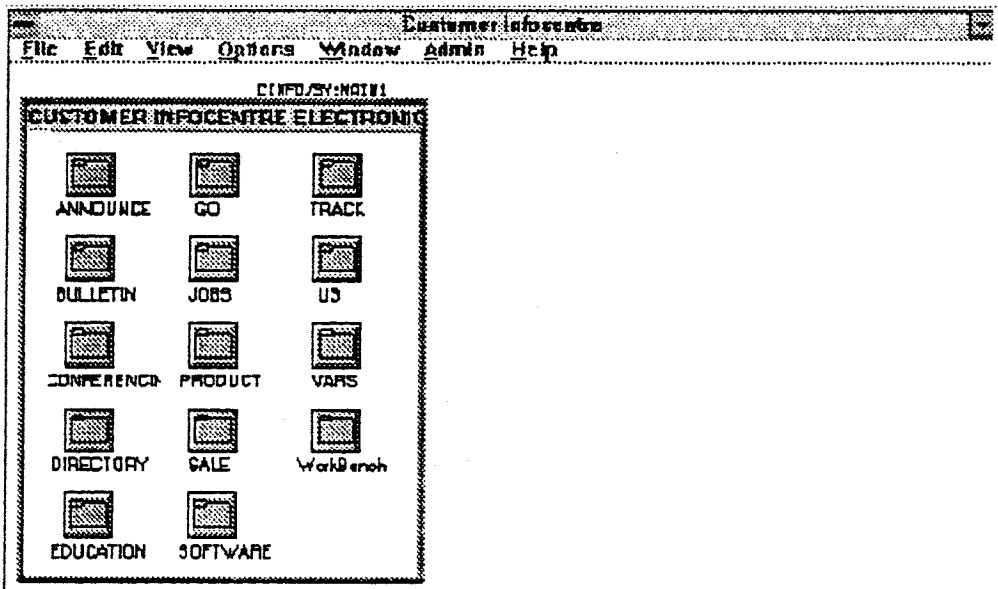


Figure 4-17 Main System Screen

Note the following points:

- U3 user grouping;
- Go - index to specific information items;
- Track - access to a specific application;
- VARS - access to information via value added grouping.

CINFO/SV:UUG1

U3 - United Unisys User Group				
F	1	CONFERENCE	U3: Conference Enquiries	9%
M	2	U3-2200	U3: 2200 User Group	9%
M	3	U3-4GE	U3: 4GE User Group	9%
M	4	U3-ASERIES	U3: A Series User Group	9%
M	5	U3-EXEC	U3: Executive Information Provision Screens	9%

Figure 4-18 User Group Index

CINFO/SV:INDX1

InfoCentre Index		
Line: 2		
M	2 ADMIN	InfoCentre Administrator's Area
M	3 ANNOUNCE	Unisys New Product & Press Releases
M	4 ASERIES	A Series Workbench
M	5 BULLETIN	Bulletin Board Areas
M	6 CALENDAR	1992 Calendar of Events
A	7 CALENDAR	1992 Diary
M	8 CASE	CASE Workbench
M	9 CONFERENCING	Customer To Customer: Conferencing
M	10 CTOS	CTOS Workbench
M	11 DIRECTORY	Unisys Directory
M	12 EDUCATION	Customer Education
M	13 GUIDE	InfoCentre User's Guide
M	14 HOTLINE	Your Feedback To The InfoCentre Administrator
M	15 JOBS	Positions Vacant Notices
M	16 ORDERS	Forms For Placing An Order With Unisys
M	17 PC	PC Workbench
M	18 PRODUCT	Product Information
B	19 SALE	For Sale - Bulletin Area
M	20 SOFTWARE	Available Software

Figure 4-19 Index to Information Items

Unisys Problem Tracking Database (PDMUS)		
A	1 ALERT	Urgent PLE Alert Bulletins
A	2 ENQUIRY	General MIP Enquiry Screen

Figure 4-20 Access to Other Applications

Value Added Resellers		
M	1 ANNOUNCE	Unisys New Product & Press Releases
A	2 CALENDAR	1992 Diary
M	3 MARKETING	VAR Marketing Bulletins
M	4 PRODUCT	Product Information
M	5 SOFTWARE	Available Software

Figure 4-21 Value Added Group Index

4.4 Establishing Items on Menu Screens

There are seven Item types which may be added to an EIC menu screen.

- another menu,
- a form,
- a free-form document,
- an external application,
- a summary message area,
- a Conference area,
- a Bulletin Board area.

To enter a new item on a menu screen, go to the File pull-down menu, select New Item. An item type selection screen is displayed.

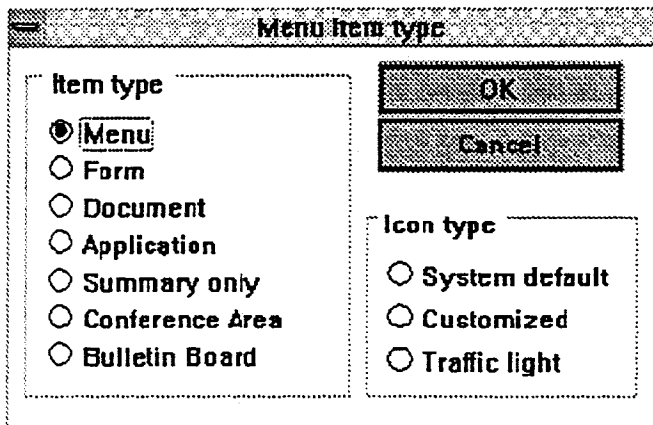


Figure 4-22 New Item Selection Screen

If the item is to be an Icon, the icon type may also be selected. The options are:

System default	Standard Icons defined by the system for menus, forms etc;
Customized	Not available;
Traffic Right	Not available.

4.4.1 Menu - Creating a New Menu Entry

Select Menu in the New action window. A screen will be presented which solicits information about the Menu type to be generated.

Figure 4-23 New MENU Item Set-Up Screen

The entry items required are self explanatory. In addition to the InfoGroup owner and the administrator, up to four other persons may maintain items to be attached to this menu screen.

Use the InfoGroup List and the User List to select InfoGroups and User-IDs.

Under Options you can specify if the menu will:

- contain documents only;
- only display items created by the user calling the menu;
- display items as Icon menu or List Box menu.

NOTE

The number of menu items nominated for this screen is deducted from the allocation setup by the system administrator for the InfoGroup as a whole. A warning message will be given when the upper limit is reached.

When the entry fields are completed, click on the OK button or press TRANSMIT.

If access security is required, enter 'Y' in the Access Security? field. On completion of data entry and transmitting, the following input screen is displayed to allow the necessary role profiles to be entered in the security input screen.

Use the Profile List button to display a list of valid profiles.

Access security profile

Enter profiles to be matched against user profile.
 [** Note: Vertical is OR, Horizontal is AND condition]

Profile list 1			

OK

Cancel

Get List...

Profile list 1
Profile list 2
Profile list 3
Profile list 4

Figure 4-26 Item security Input Screen

NOTE

Role profiles entered ACROSS the screen are AND'd. Role profiles entered DOWN the screen are OR'd. Any combination may be entered to achieve the necessary access security. Only those users with the specific role match will be allowed access to the menu screen.

4.4.2 Form - Creating A New Input Form

Forms are used to apply for things, or as control documents of some kind. When used in conjunction with the mail system, they become a simple but powerful mechanism whose functionality may be used by the EIC administrator for many different functions.

In addition to mailing, a Form may also be optionally saved to a nominated menu anywhere in EIC. This allows an audit copy of a completed input document to be saved.

The input forms are completely free-format. The descriptive (literal) text is protected when displayed for users. Input fields are defined by use of the underscore '_' character. The use of MAPPER reserved words adds a powerful capability which allows a document to be sent which has the current date or time or an incremental sequence number, etc.

Select Form from the New entry window. A List Box of InfoGroups is displayed.

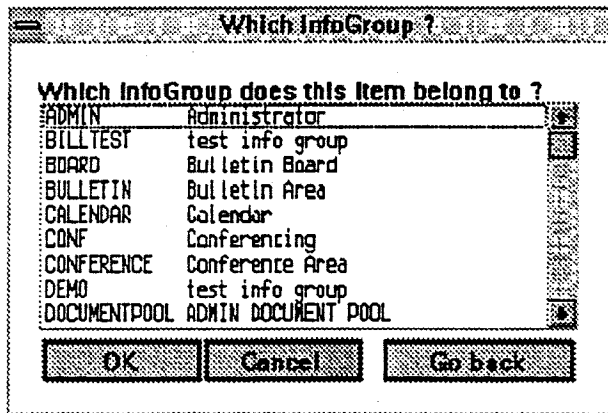


Figure 4-27 Define the InfoGroup for the Form

Select the InfoGroup in which the Form will be registered.

Enter the Title and keyword details as shown in Figure 4-20.

The process of entering the New Form is now completed, the menu screen on which the new form is attached is displayed.

To develop the form, select the form entry the user created (as detailed previously from the menu) and TRANSMIT to go to the form.

A blank input form will be displayed.

Go to the Edit pull-down menu, select Update, then TRANSMIT.

Enter the necessary text, using the editor commands as required.

If the Form is to be saved in an audit trail menu and/or to be sent to the E-Mail system, go to the File pull-down and select Title & Options.

Setup a save area by entering the InfoGroup and menu number in which the form is to be saved. If not required, leave blank.

Enter the Mail details if required.

When data entry is completed, press TRANSMIT.

Now go to File pull-down and select Save to store the form.

4.4.3 Document - Entering a Free-Form Document

1. Select Document on the New entry window.
2. Nominate the InfoGroup in which the document will be located.
3. Enter the Title, Keyword and access security details.
On initial entry a blank document will be displayed.
4. Go to the Edit pull-down menu and select UPDATE to update the document.
5. Use the editor commands to edit the free-form entered text.
6. On completion of text entry, select Exit on the File pull-down menu.
7. On the pop-up dialogue box select yes to save the text and return to menu.
The document is now available to users.

4.4.4 Application - Connecting an External Application

Two major capabilities are provided by APPLICATION connection function.

- Passing control to an external application.

In this mode, the EIC system hands control over to the selected application and the user is under the control of that application. On exiting, user control returns back to EIC.

- Displaying data generated by an external application.

In this mode, EIC does not know anything about the external application simply displaying data presented by it. This is a core component of the Executive Information capability.

Select Application on the New input window.

The screenshot shows a dialog box titled "Application Call". It has a text input field for "Application call statement:". Below this is a section titled "Result type to be passed from the application:" containing six radio button options: "None" (which is selected), "Text", "Mapper Graphics", "As defined in the result heading", "Menu ENTRY POINT of a foreign InfoCentre", and "Designer Workbench Application". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Go back".

Figure 4-28 Application Details Screen

Enter the Application Call details. (Run name, sub-calls, etc).

Select the result type to be passed - this determines whether control is passed to the application or not.

If EIC is to pass control to the application select 'none'.

If EIC is to display data from the application without passing control select the appropriate result type definition.

If the application being called is on a different system to this one, select Foreign Media Entry Point.

Enter Title, keywords and security details in the setup screen.

Example;

PRICES,2200.software

4.4.5 Summary - Setting Up a Summary Note

1. Select Summary on the New entry window.
2. Setup the Title, keywords and security details.

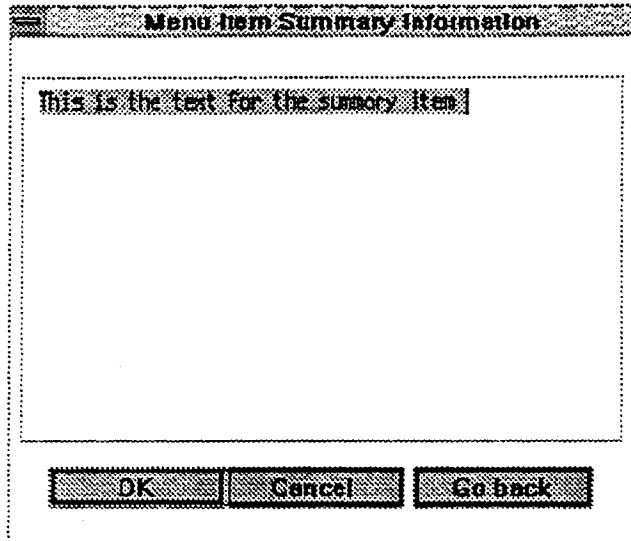


Figure 4-29 Summary Note Input Screen

3. Enter the summary note details then click on the OK button or press TRANSMIT.

- To access the Summary Note, position the pointer to the menu item created and 'double click' or press Xmit.

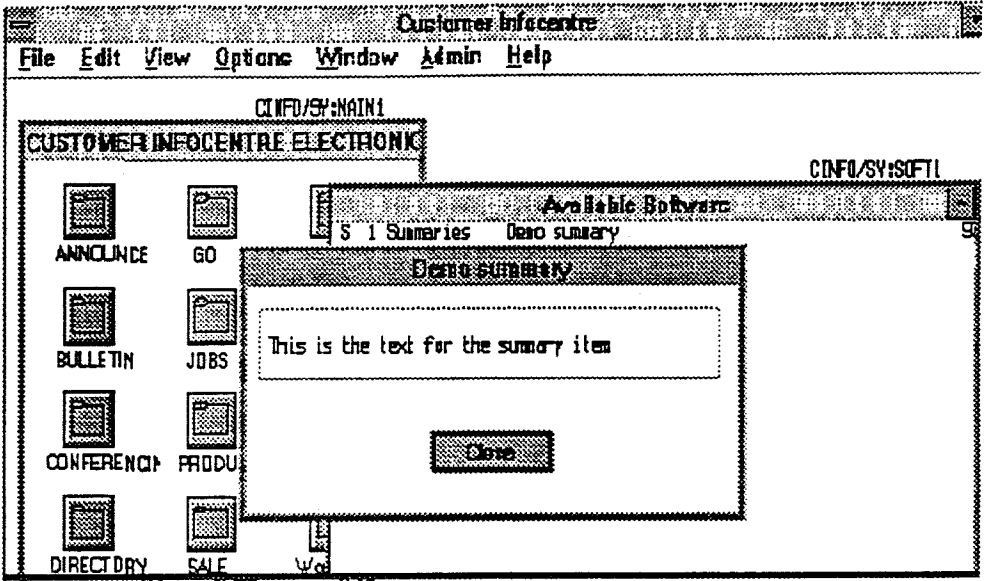


Figure 4-30 Summary Note Display

4.4.6 Conference - Setting Up a New Conference Area and Facility

Select Conference on the New input window.

Establish the menu screen using the setup entry screen.

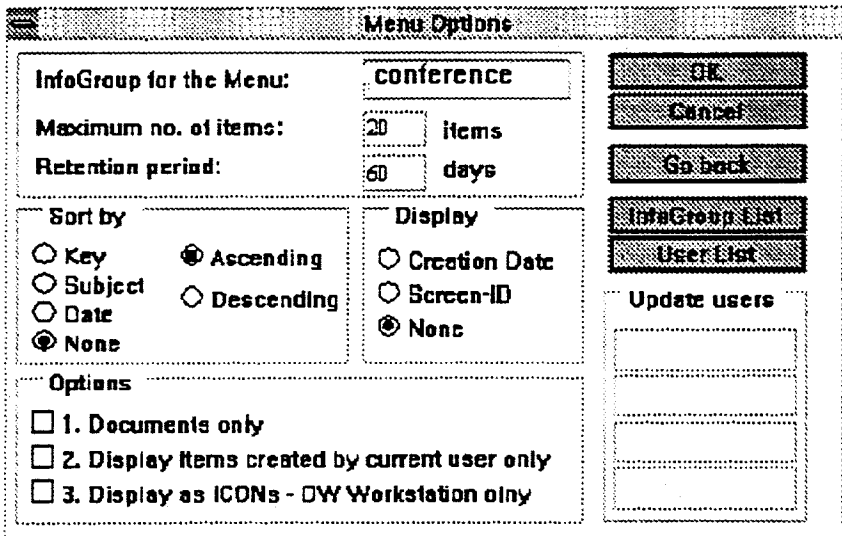


Figure 4-31 Conference Setup Input Screen

Enter the details for the Title, keyword and access security setup screen.

The Conference Area menu screen is now setup.

Go to the new conference area, a blank menu screen will be displayed.

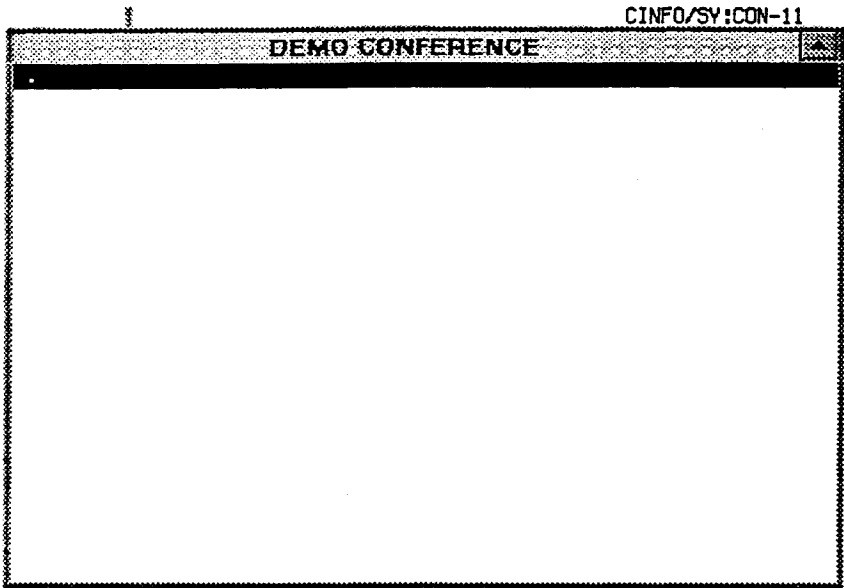


Figure 4-32 Initial Menu Screen for Conference Area

The next step is to establish a conference.

Go to File pull-down and select Open New Conference.

This will allow the establishment of the initial conference.

Enter Title and security details as for previous actions.

Go to the new Conference, a blank input screen will be displayed. The initial text to start the conference process will be established in this area.

To do this, go to Edit and select UPDATE.

Enter the initial text, using the editor as required.

To open the conference for use, go to File and select Open Conference.

4.4.7 Bulletin - Bulletin Board Establishment

Select Bulletin Board on the New entry window. This will initially establish a Bulletin area.

Enter the InfoGroup and menu setup data.

Enter the Title, keyword and security details.

The Bulletin area is now established.

Go to the new Bulletin area, a blank menu screen will be displayed, select New on the File pull-down menu.

The screenshot shows a window titled "New Bulletin board message" containing a sub-window titled "Add final Test bulletin board message". The sub-window has the following fields and values:

Keyword :	NEU	Expiry Date (ddmmyy):	180488
Subject :	New bulletin board item		
Message:	new board for bulletin board item		

At the bottom of the sub-window are three buttons: "OK", "Cancel", and "Remove".

Figure 4-33 Bulletin Input Screen

Enter the data in the Bulletin input screen as required, then click on the OK button TRANSMIT.

The person who sets the Bulletin up will see the above screen entry. This will allow further updates if required.

All other users see the Bulletin as a Pop-up window.

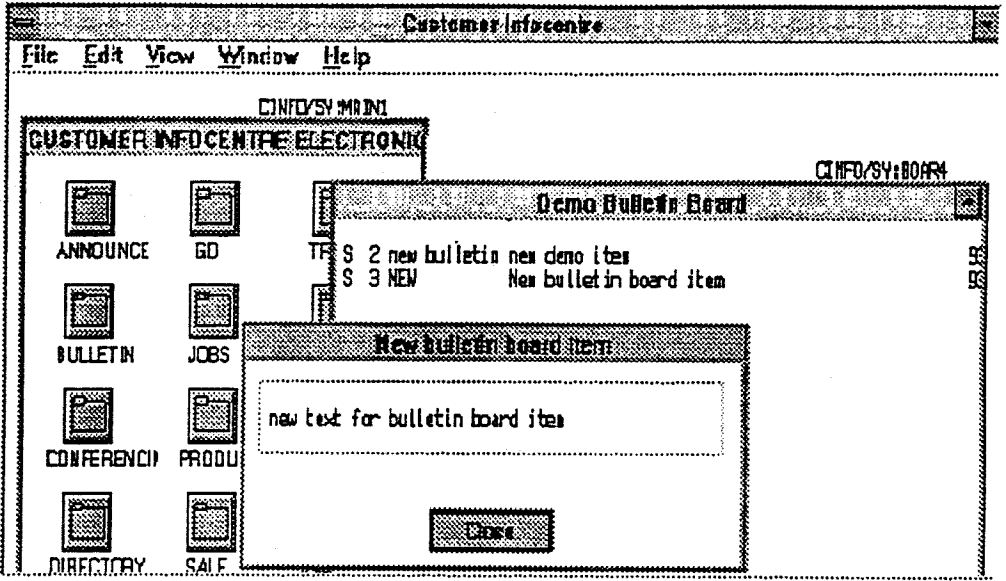


Figure 4-34 Example Bulletin Pop-Up

4.4.8 Changing Icons

1. Display the menu to be changed.
2. Select MARK function on the EDIT pull-down.
 - a menu of screen items will be displayed.

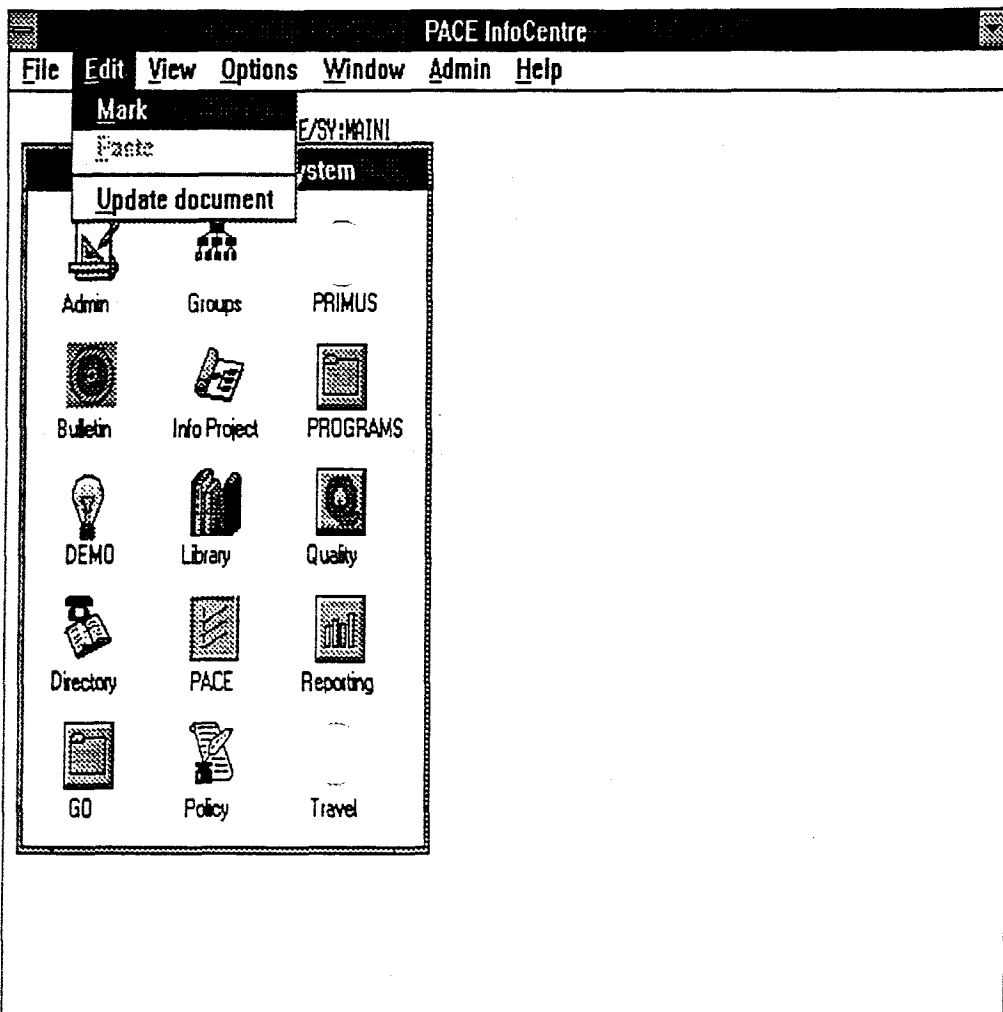


Figure 4-35 Change Item - Edit Pull-Down

PACE Information System					
M	1	Admin	PACE Administration	15-05-92	ADMIN1
B	2	Bulletin	Diary Dates / For Sale / Announcements	15-05-92	BULL1
M	3	DEMO	Demonstration Menus	04-03-93	CSPR2
M	4	Directory	Telephone Listings	10-04-92	PAC07
M	5	GO	Index to PACE Information	11-09-91	INDX1
M	6	Groups	PACE Group Information Areas	29-05-92	PGRP1
M	7	Info Project	InfoCentre Development Related	30-06-92	info1
M	8	Library	Library - PACE Library Operations	11-02-92	LIBR1
M	9	PACE	Information about PACE	10-03-92	PAC01
M	10	Policy	PACE Policies and Procedures	17-09-91	PAPR1
M	11	PRIMUS	PRIMUS Services	03-02-92	PAPP2
M	12	PROGRAMS	CS Programs	07-06-93	CSPR36
M	13	Quality	PACE Quality Program	18-09-92	QUAL1
M	14	Reporting	General & CSPG Reports	11-09-91	GREP1
M	15	Travel	International & Domestic Travel Bookings	22-04-92	travl

Mark the item(s) you want to select.
Then click on the appropriate command button.



Figure 4-36 Select Item to Change

3. Select the item corresponding to the icon you wish to change.
4. Select the CHANGE button.

the Change Menu Item selection screen will be displayed.

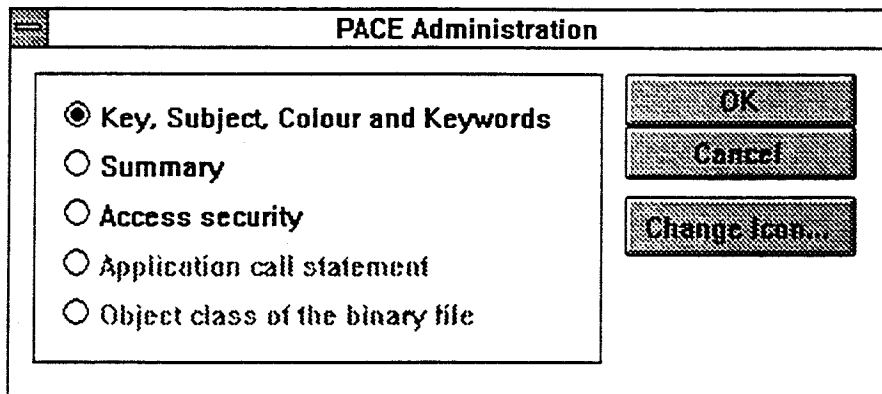


Figure 4-37 Change Menu Item

5. Select the CHANGE ICON button.

- an Icon source selection screen is displayed.

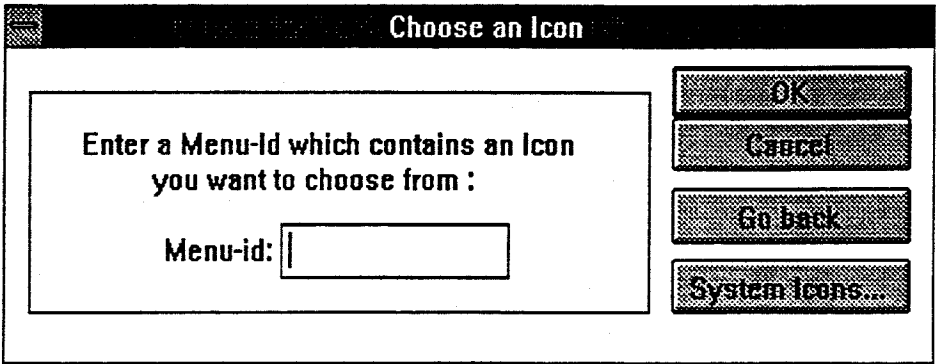


Figure 4-38 Choose Icon Source

6. Select SYSTEM ICONS.

- an icon Picture Selection menu will be displayed.

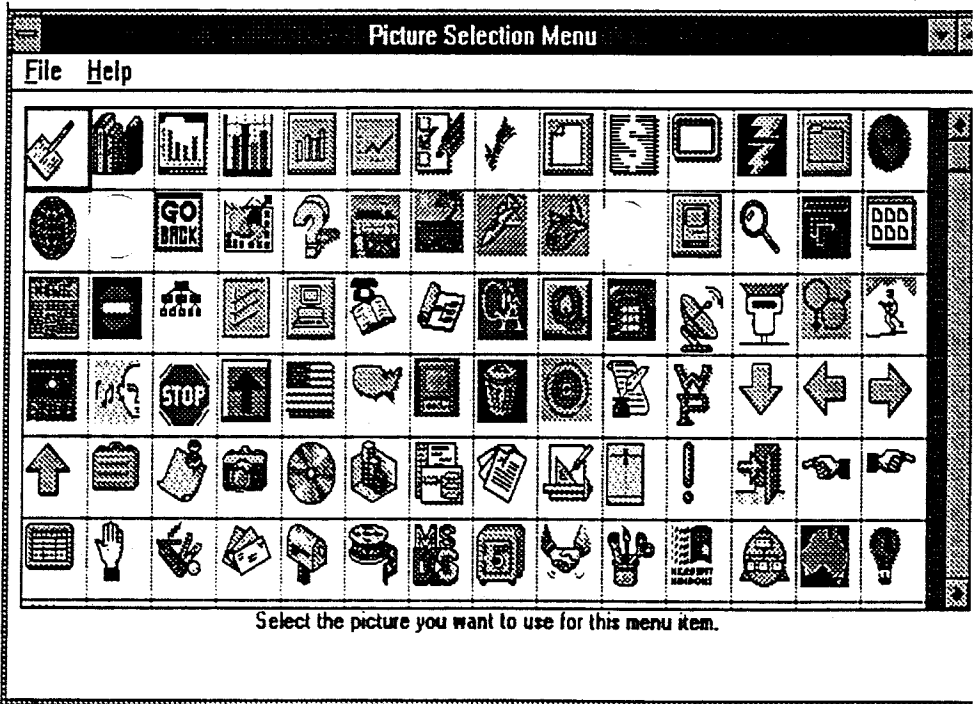


Figure 4-39 Select Icon Picture

7. Select the required Icon.
 - the Change Menu Selection screen will be redisplayed.

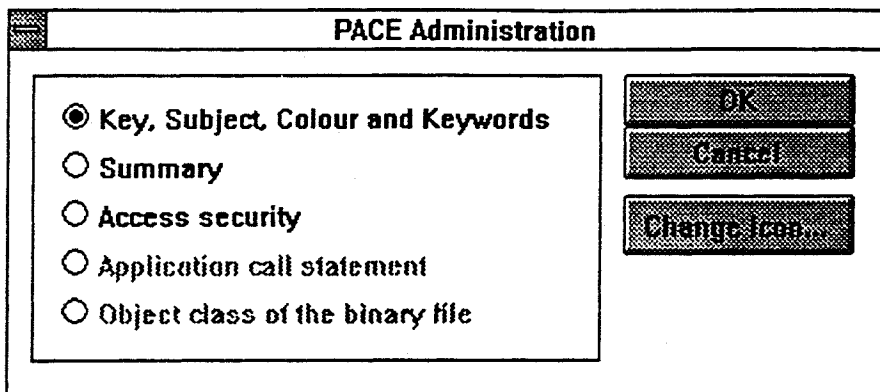


Figure 4-40 Return from Icon Selection

8. Select CANCEL to process the selection, or CHANGE ICON to choose another Icon.

4.5 Getting Data into the Structure

4.5.1 Creating Documents

You can create a document within EIC in several ways:

- Create a blank document, then enter the text content;
- Importing a text file from the host computer;
- Use the external CREATEDOC capability.

These three methods are detailed as follows:

4.5.2 Updating a Blank Document

To create a document within EIC:

1. Move through the menus to the menu in which you want the new document recorded.
2. Select the "File - New item" option from the Menu Bar.
3. If there is no ordering setup for the items on the screen, EIC will display a message requesting that you position the cursor at the position on the screen where you wish to insert the new menu item. Once you have positioned the cursor, press the transmit key.
4. Specify the type of item you are creating as a document.
5. Specify the InfoGroup to which this document will belong.
6. Complete the standard item definition form, which is documented under "Establishing items on Menu Screens" in the "Setting Up the System" section of this guide.

Once this process is completed you will have an empty document to which you can add text by following the "updating" procedure, which is detailed further on in this section.

4.5.3 Importing Files

PC, host or MAPPER files may be imported into EIC and stored as menu items - these may be text, binary or MAPPER graphics files. For PC binary files, EIC requires that a PC application (for example Microsoft WORD for Windows) must be nominated as the mechanisms which EIC will launch to display the file. This software must obviously be installed and configured on the User's workstation workstation - if not available, EIC displays a message that the file is not displayable on the current workstation.

To import a file as part of the process of creating a document, select the "File - Import" option in the Menu Bar

The File Import screen provides the facilities necessary to import and establish a file as a menu entry in EIC and to establish the necessary security and access controls.

Source: PC Host Mapper

File Name: Full path name for PC / Host file or Mapper Report-id (R-D-C).

Object Class: File type or Application associated with. InfoGroup: Width: 80

Menu Item Informations:

Primary Key

Subject

Keywords

Icon type: Icon menu only

Options:

System default
 Select from System Icons
 Select from a menu (Enter a menu-id)
 Traffic light

Summary Info
 Access Security
 What's New

Figure 4-41 File Import Screen

The File Import screen comprises two major functional areas, each detailing the information to be provided in establishing a file in the EIC menu structure.

File type selection area

The screenshot shows a graphical user interface for file import. At the top, there are three radio buttons under the label 'Source': 'PC' (selected), 'Host', and 'Mapper'. To the right are 'OK' and 'Cancel' buttons. Below this is a text field for 'File Name: Full path name for PC/Host file or Mapper Report-id (R-D-C)'. A 'PC files...' button is also present. The main area is a table with columns: 'Objc: Class', 'File type or Application associated with', 'InfoGroup', and 'Width'. A list of file types is shown in a scrollable box, with 'MS POWER POINT (PPT)' selected. The 'Width' column shows a value of '80'.

Objc: Class	File type or Application associated with	InfoGroup	Width
	MS POWER POINT (PPT)		80
	MS WINDOWS PAINT BRUSH (*.BMP)		
	MS WINDOWS PAINT BRUSH (*.PCX)		
	MS WORD FOR WINDOW (*.DOC)		
	MS-DDS BATCH FILE (*.BAT)		
	MS-DDS EXECUTABLE PROGRAM (*.EXE)		
	MS-DDS SYSTEM FILE (*.SYS)		
	TEXT FILE (*.TXT)		
	WINDOWS METAFILE		

Figure 4-42 File Type Selection, Associated Application

This section of the screen allows the target file name to be defined as follows:

Step 1 - nominate the source file type by checking the respective Source indicator.

- PC file - use the standard PC file definition nomenclature (example C:\EIC\test.doc).
- Host file - use the standard host file definition nomenclature.
- MAPPER REPORT - use the standard nomenclature (example 1A20 = Report 1 Drawer A Cabinet 20)

Step 2 - If PC file, you must nominate an application which will be loaded to view it once it is inserted in EIC. (When the user selects the menu entry, the file is downloaded and the viewing application is launched automatically). Otherwise, go to step 3.

Step 3 - Nominate the Infogroup in which this item is to be inserted.

Note: Leave column width at default (80) for PC files.

EIC Menu establishment area

Menu Item Informations:

Primary Key	<input type="text"/>	<input type="button" value="More Keywords..."/>	
Subject	<input type="text"/>		
Keywords	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>

Icon type: Icon menu only

<input checked="" type="radio"/> System default	
<input type="radio"/> Select from System Icons	
<input type="radio"/> Select from a menu (Enter a menu-id)	<input type="text"/>
<input type="radio"/> Traffic light	

Options:

<input type="checkbox"/> Summary Info
<input type="checkbox"/> Access Security
<input type="checkbox"/> What's New

Figure 4-43 EIC Menu Item Establishment

Note: For a full description of this process, refer to Section 4.4 in this Administration Guide.

To complete the menu description, the following must be provided:

- A Primary Keyword.
- Subject heading (menu item description).
- Additional keywords (more may be added by selecting the More Keywords button).
- Select the source of the icon to be paired with this file (Icon menu only).
- Options:
- Check the Summary box to attach a summary message to the menu entry.
- Check the Access security box to control access to this item.
- Check the What's New box to have the item added to the News menu area.

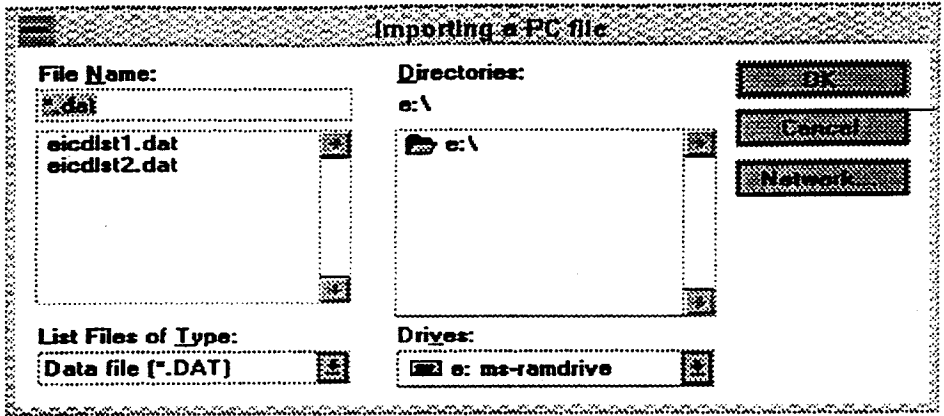


Figure 4-44 Imported PC File Location Screen

Enter details of the PC location of the file.

4.5.4 External Document Interchange and Placement

The Document Interchange and Placement (DIP) capability will be established on each host system used as a document source. This capability is intended to allow any MAPPER report to be directed to a target EIC system menu on a nominated host or hosts. Where a host system is also to be used as a queuing node for documents being sent to other local EIC systems, additional functionality (not visible to the user) will be provided to achieve this.

4.5.5 The Document Interchange and Placement Mechanism

For the User, the DIP mechanism consists of three major functionality components.

- the external DIP run which transfers the document to nominated EIC systems.
- a Distribution List mechanism.
- A 'spawning menu' capability.

On selecting a document to be sent to an EIC system, the User accesses the document and then calls the 'CREATEDOC' run (note that the run name may vary).

A selection screen is presented on which the User may nominate a predefined distribution list name or the specific EIC system name(s), Information Group and menu(s) to which the document is to be directed. This screen also allows the User the choice of including the document in the public news area and whether there is to be access security constraints attached to the document.

4.5.6 Distribution List Establishment

A distribution list is established by the EIC Administrator in order to have a standard set of destinations for particular document types. The Distribution List information is copied to the Document Interchange and Placement Directories on each host where documents may be dispatched to an EIC system.

To establish a distribution list, select System tables on the Admin pull-down menu. On the System Tables cascading menu select the Distribution List entry.

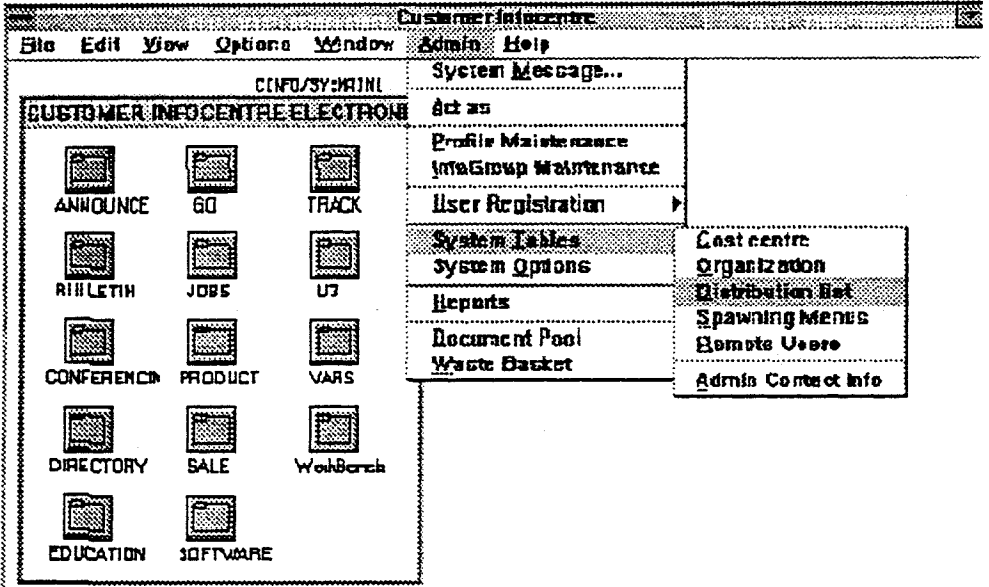


Figure 4-46 System Tables Menu on Admin Pull-down

Step 1

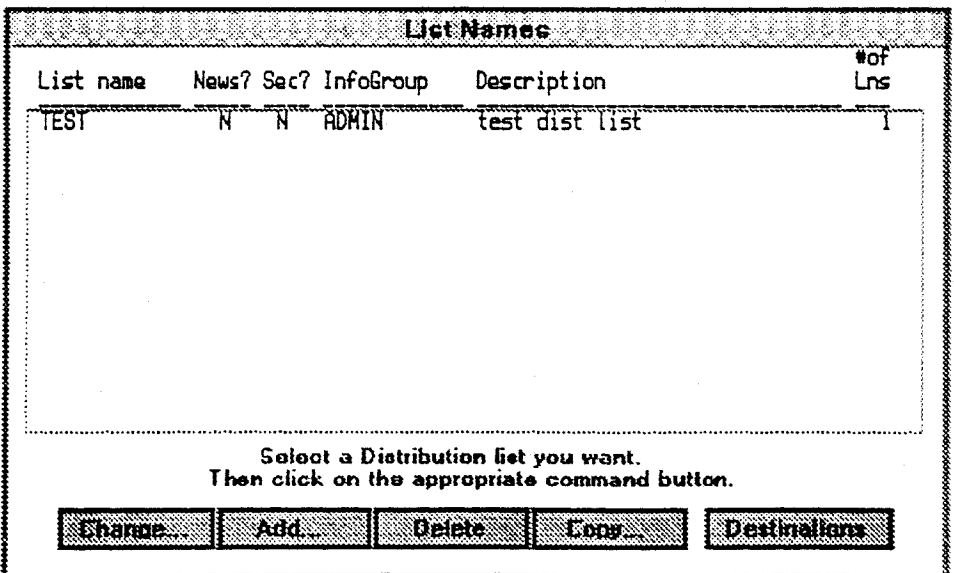


Figure 4-47 Dip Distribution List Maintenance Menu

Step 2

To add a new Distribution List, select the Add button. An input screen will be provided which solicits the following information.

- the Distribution List name;
- the InfoGroup it will belong to;
- a descriptive title for the Distribution List.

Enter the necessary details then click on the OK button or TRANSMIT.

```

EIC/SY                               Distribution list                               Ln: 1 of 1
File  Help

-----
ADD ..... Tab to the item you want to copy.   Then press F2.
DELETE .. Tab to the item you want to delete. Then press F6.
CHANGE .. Tab to the item you want to change.  Then press XMIT.
-----
Seq  List name  | Create a NEW distribution list
-----|-----
1  _ TEST      | Press the transmit key when you complete.
          |
          | Distribution List name ..... [NEW      ]
          | Which InfoGroup does this list belong to ? [2200 ]
          | Description ..... [NEW DIST LIST - Documentation ]
          |
-----|-----

Command _____ 12Cancel
1      2      3Exit 4Refresh 5Prompt 6      7      8      9      10

```

Figure 4-48 DIP Distribution List Input Screen

Step 3

The system now redisplay the list of distribution list names with the one just added highlighted. Select the Destinations button to add destinations to the list.

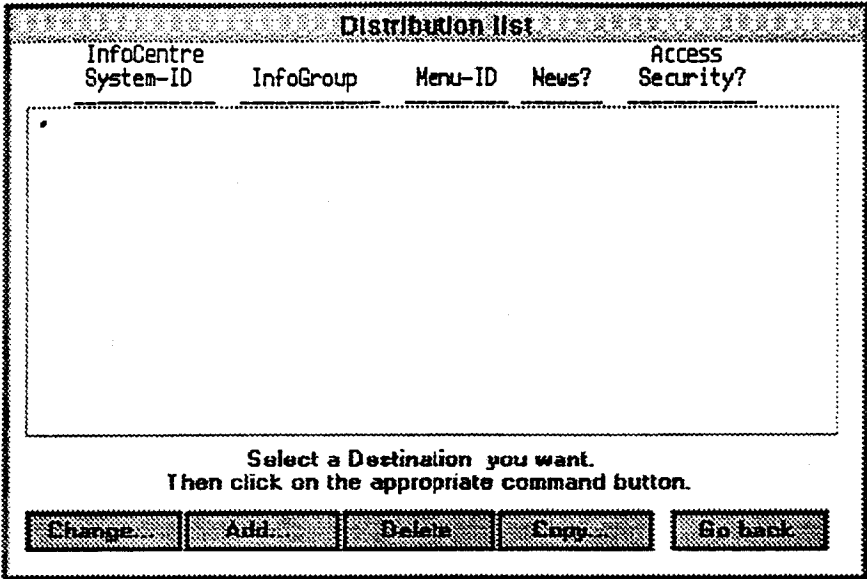


Figure 4-49 DIP Destination Maintenance Screen

Initially the destinations for a new distribution list will be empty, select the Add button to add destinations.

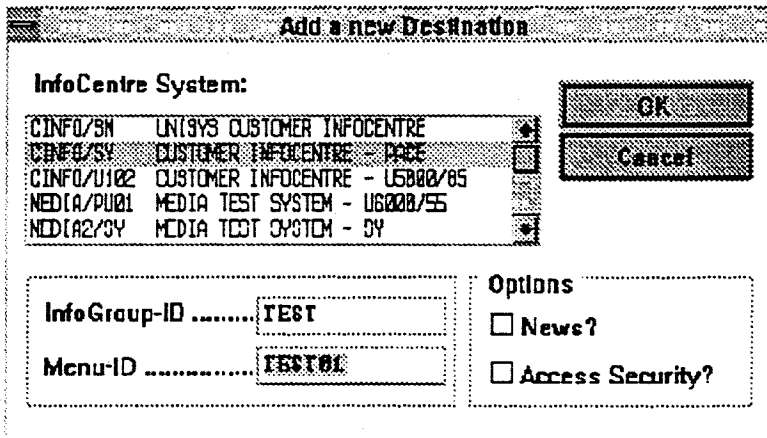


Figure 4-50 DIP Add Destination Screen

Select the destination system from the list box, enter the destination InfoGroup and Menu ID. The Administrator may optionally have all documents displayed on the target system News screen and also establish access security parameters. Transmit or click on the OK button.

Use the Add function to add as many destination systems as required.

Step 4

When all of the target system entries are completed, select the Go Back button to return to the Distribution List maintenance screen.

List Names					
List name	News?	Sec?	InfoGroup	Description	#of Lns
TEST	N	N	ADMIN	test dist list	1
testlist	N	N	ADMIN	Distribution list	1

Select a Distribution list you want.
Then click on the appropriate command button.

Figure 4-51 DIP Distribution List Maintenance Screen - Example

Step 5

The new Distribution List is established and at this stage the DIP directories are updated. The Administrator may now exit back to the system.

4.5.7 Spawning Menus

The Spawning Menu capability allows a regional information manager to have documents sent to nominated menus, automatically 'spawned' to other menu screens on other EIC systems in the region.

As an example, a Product Manager in SPG in directing documents to the local InfoCentre system (using the EIC Application) would have them automatically distributed to the Customer InfoCentre systems (UNIX-based) in Australia and New Zealand.

Note that the 'spawning' capability is only utilized by the Document Interchange and Placement (DIP) mechanism.

Any EIC system menu may be established as a spawning menu.

Step 1

Select the System Tables entry on the Admin pull-down menu and nominate Spawning Menus. A Spawning Menus maintenance screen is displayed.

In the example, no menus have been established.

Spawning Menu	News?	Sec?	InfoGroup	Description	#of Lns
sott1	Y	N	Usoftware	Available Software	1

Select a Spawning Menu you want.
Then click on the appropriate command button.

Change... Add... Delete Copy... Destination

Figure 4-52 Spawning Menus Maintenance Screen

Step 2

Select the Add button to add a new Spawning Menu.

The system will provide a pop-up window which allows the nominated menu to be defined.

Add a new spawning menu

Enter a Menu-ID which will have Spawning facility.

Spawning Menu-ID:

OK Cancel

Figure 4-53 Nominating a Spawning Menu

Step 3

Enter the required menu ID then click on the OK button or TRANSMIT.

The system now redisplay the list of spawning menus with the one just added highlighted. Select the Destinations button to add destinations to the menu.

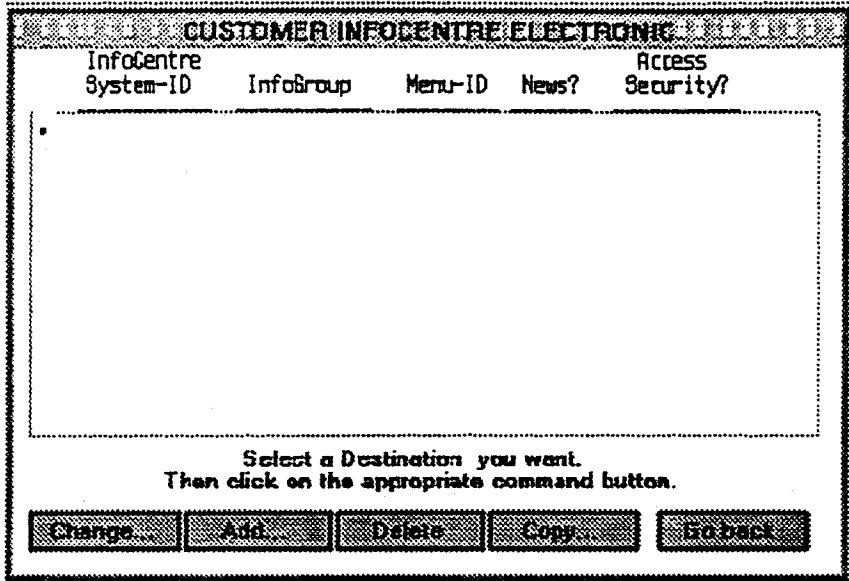


Figure 4-54 Spawning Target System details

Initially the destinations for a new spawning menu will be empty, select the Add button to add destinations.

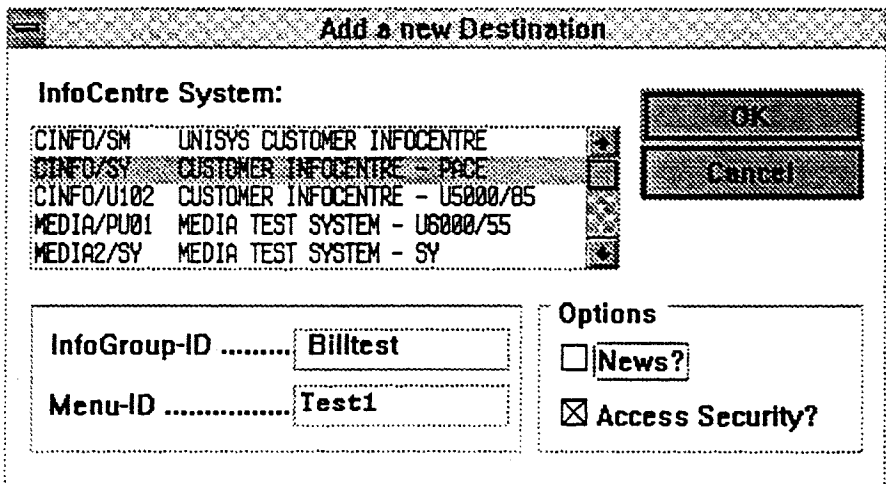


Figure 4-55 Spawning Menus - Add Destination System Details

Select the destination system from the list box, enter the destination InfoGroup and menu ID. The Administrator may optionally have all documents displayed on the target system News screen and also establish access security parameters. Click on the OK button or Transmit.

Step 4

Having entered the target EIC system details and nominated security provisions are required in this instance, on transmitting a Security Access maintenance screen will be displayed.

Access security profile

Enter profiles to be matched against user profile.
(** Note: Vertical is OR, Horizontal is AND condition)

Profile list 1	Profile list 2	Profile list 3	Profile list 4

OK
Cancel
Go back

Figure 4-56 Target System Security Details

Enter the EIC Access Profiles allowed to have access to the target menu screens then TRANSMIT.

Step 5

The destinations for the spawning menu are displayed.

CUSTOMER INFOCENTRE ELECTRONIC				
InfoCentre System-ID	InfoGroup	Menu-ID	News?	Access Security?
CINFO/SY	BILLTEST	MAIN1	N	Y

Select a Destination you want.
Then click on the appropriate command button.

Figure 4-57 Target System Maintenance Screen

Step 6

Select **Add** to add more destinations or **Go Back** to return to the spawning menus maintenance screen.

This will now display the new Spawning Menu entry.

Spawning Menu	News?	Sec?	InfoGroup	Description	#of Lns
main1	N	Y	NAIN	CUSTOMER INFOCENTRE ELECTRONIC	1
soft1	Y	N	Usoftware	Available Software	1

Select a Spawning Menu you want.
Then click on the appropriate command button.

Figure 4-58 Example Spawning Maintenance Screen

The Administrator may now return to normal EIC system operations.

4.5.8 Document Interchange and Placement - System Overview

The Document Interchange and Placement mechanism is an external mapper system which is used to transfer a MAPPER report to any number of target EIC systems by individual system selection or nominated Distribution List.

Each DIP host has a current copy of the EIC DIP System Directory which identifies the available EIC host MAPPER systems and the DIP node from which they are queued.

Within a region, one of the EIC system hosts will be nominated as a queuing node for the systems around it.

'Trusted' Information Providers are allowed to send documents direct to nominated EIC system screens without Administrator intervention.

'Non-trusted' Information Providers may not do this - the documents they create and send to a nominated EIC system, are trapped in the document pool for that system for inspection prior to placement by the system Administrator.

In the event of errors such as the Information Provider not being recognised on the target EIC system, menu screen number invalid, etc., the document is trapped in the EIC system pool menu. The Administrator can examine the control information attached to the document in order to track down the originating system and Information Provider.

4.5.9 DIP System Tables and Components

The system tables and components that make up or are used to manage the DIP mechanism are as follows:

1. DIP System Directory (Network EIC Configuration tables).
2. System registration table.
3. Remote User table.
4. Spawning menus.
5. DIP Distribution Lists.
6. DIP Queue.
7. EIC Document Pool.
8. MAPPER run and user registration for DIP.
9. Network Configuration Report.

4.5.10 DIP System Tables Summary

1. DIP System Directory (Network EIC Configuration Table)

This table shows the DIP node queuing systems and the EIC systems directly associated with them.

2. System Registration Table

This table describes the information that the DIP mechanism needs to know about the location of the database for each EIC systems on local host.

3. Remote User Table

For each remote host identified in this table, a relationship is defined between the Information Provider's MAPPER User-ID used on that remote host and the same Information Provider's MAPPER User-ID on the target EIC system.

The DIP mechanism passes the Remote User-ID, Remote MAPPER Department number with the transferred document.

A number of default options are available with this table by leaving the Remote User-ID, Remote Department Number and/or Local User-ID fields blank.

.@	Remote	MEDIA Users			
* Remote	Remote	Remote	Rate	Local	Loc
* Host-ID	User-ID	User-ID	Dept	User-Id	Dept
MAP1SN			641		
MAP2SM	DEMO		641		
MAP5SN					
MK					

..... END REPORT

1 2Paint 3 4Return 5 6Tasks 7View 8Help

Figure 4-59 Remote User's Table

Example for the table shown:

If Remote User-ID is left blank, anyone in Dept 641 can send documents direct to a menu on the target EIC system.

If the Local User-ID is left blank, the Remote User-ID is used on the target EIC system.

4. Spawning Menus

This table shows the nominated Spawning menu with the 'slave menus' attached.

The information for each 'slave' menu includes the InfoGroup and system name.

This facility in effect provides a distribution list attached to a nominated menu in the local EIC system.

Identification of an existing menu as a spawning menu and maintenance of the 'slave' or target system menu lists, is done by using the functionality available in the System Tables area of the File pull-down menu.

5. DIP Distribution List

This table shows the originating system and copy-to system details for each DIP Distribution List defined.

6. DIP Distribution Queue Index Table

This table describes the queue index structure for the DIP node queue (one per nominated queuing host).

7. Document Pool

The document pool is a standard EIC menu which is restricted purely for Administrator and system use. The main functional exception is that this special menu is accessed via the Admin pull-down menu as an Administrator function.

8. Mapper Run and User Registration

The standard run name used for the DIP application is CREATEDOCBG. The standard Application User-ID is BPORT641

9. Network Configuration Report

This is a table of MAPPER system and network path names established and maintained by the local IS MAPPER co-ordinators.

4.5.11 Remote EIC User Registration

Authorised users may send MAPPER reports or documents from remote hosts to the local EIC information system by calling a special run on the remote host which communicates with the Document Interchange and Placement mechanism.

Users must be registered for use of this mechanism, this is achieved by using the Remote EIC Users control table mechanism.

Register a user on the Remote Users table.

Select System Tables entry on the Admin pull-down menu and nominate Remote users. The existing details are displayed.

Remote Users				
Remote Host-Id	Remote User-Id	Remote Dept	Local User-Id	Local Dept
MAP1SN		641		
MAP2SM	DEMO	641		
MAP5SN				

Select a Remote User you want.
Then click on the appropriate command button.

Figure 4-60 Remote Users Maintenance Screen

Click on the Add button to add a new user.

An input screen for user details is displayed.

Add a new Remote User

Remote Host-ID:

MAP2SM

OK

Cancel

Local Users

	Remote	Local
User-ID	remoteuser	localuser
Dept. No.	641	30]

Figure 4-61 Remote User's Details Screen

Select the Remote Host from the list box and enter the remote and local user-ids and department numbers. When complete Xmit or click on the OK button.

The updated table is redisplayed. Add additional users as required or use exit to return to the menu.

4.6 Loading Documents After the System Has Been Set Up

Once the organisation structure and InfoGroups have been setup, you can start structuring the menus, setting up forms, importing documents, etc.

A number of strategies may be adopted for loading documents into a new menu system. The most practical approach is to train clerical staff to gather, classify, then import the documents into the defined areas.

The administrator is then left to finally classify, position or discard documents as required.

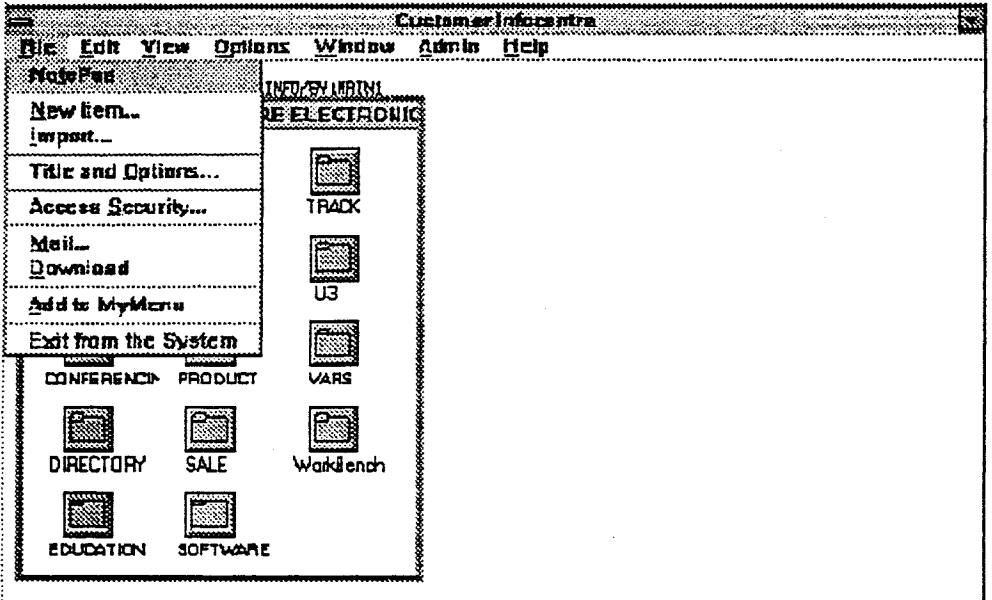


Figure 4-62 Administrator's File Pull-down Menu

4.6.1 Create an "INDEX" Menu

1. Select New Item from the File pull-down menu.

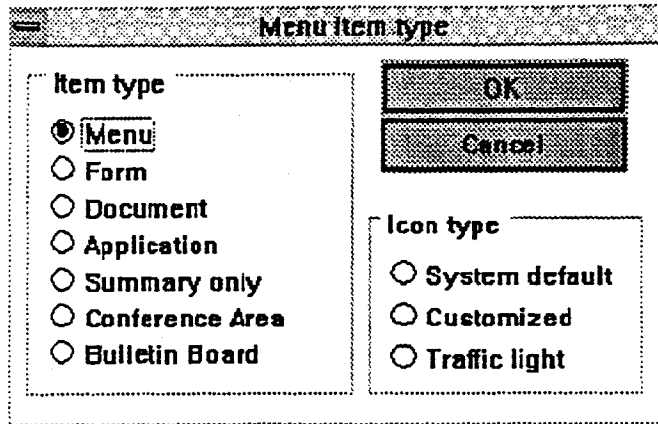


Figure 4-63 New Menu Item Selection

2. Select menu.
3. Click on the OK button or press XMIT.

You can follow this procedure for creating other menus. Remember that the menu you create is listed on your current screen. That is, if you wanted to create another menu within a menu called Index, you would select Index to make it current (initially it is blank) and follow the same procedure.

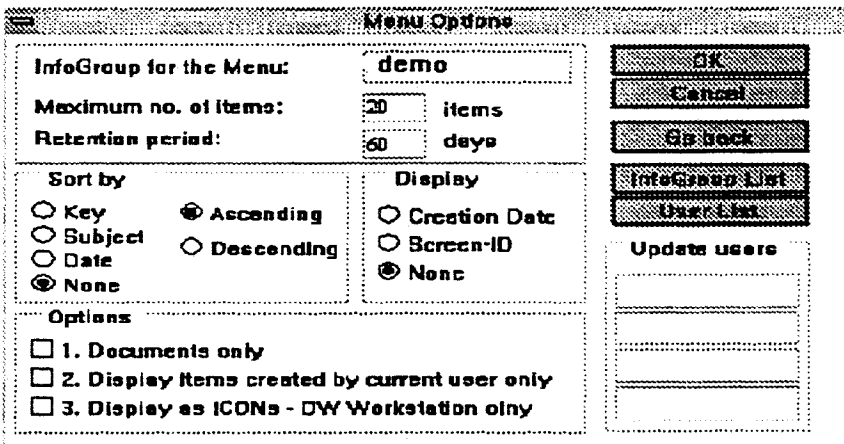


Figure 4-64 New Menu Item Definition Screen

4. Create other Menus as desired.

4.6.2 Load Documents Into Index Area

Utilize the EIC import capabilities or the external "CREATEDOC" run to push the documents to the nominated screen.

4.6.3 Creating a Menu Structure

Careful consideration should be given to the menu screen structure. Try to keep the main menu screen as short and uncluttered as possible. With due consideration to security, setup an index screen off the main menu which points to each of the following:

- A menu which points to all InfoGroups within the system.
- A menu which points to InfoGroups belonging to departments within your organisation.
- A menu which points to every MAPPER application available to your users.

If you have a software development group that contains three project groups, you might need to create a similarly structured menu hierarchy for general information.

However, each group is interested in security aspects, so a separate menu item should probably be set up for security.

4.6.4 Copying Documents from Index to Relevant Menus

For each document you want to copy:

1. Display a menu which contains documents you want to copy.
2. Select Mark on the Edit pull-down menu.
3. Mark the document(s) required.
4. Click on the OK button or TRANSMIT.
5. Display the menu which will receive the documents.
6. Select Copy from Edit pull-down menu.

You can use a similar procedure to move documents (select Move instead of Copy).

Important Concept

When you copy an item from one menu to another, the item itself is not duplicated. A reference point is set up so that it can be accessed from the new menu.

An item may be "copied" to more than one additional menu.

4.6.5 Copying Documents into Personal Menus

For important users there may be a requirement to copy documents or setup initial links to other menus.

Use the general procedure described above.

4.7 Managing InfoGroups

InfoGroups are separate areas of information. You should assign each InfoGroup an owner, who is responsible for all of the information within the InfoGroup. The owner of an InfoGroup has read and write access to all information within the InfoGroup.

In addition to the owner of the InfoGroup, you can assign up to 36 users as "assistants", who will also have read and write access to all of the contents of the InfoGroup.

The InfoGroups that you set up should reflect the different subjects that information can be grouped by in your organisation. The number of InfoGroups that you set up should be determined by the number of groups of people who can be responsible for the contents of each InfoGroup.

As you enter each InfoGroup into the system, you should make a corresponding menu in the main EIC index. (See "Menus" below for details)

4.8 Updating Documents

Documents in EIC are edited through a process called updating. Updating is a specific mode within EIC. Some different options appear in the Menu Bar when EIC is in update mode.

Before displaying the document to be updated.

You can enter the update mode by selecting the update action on the Edit pull-down menu.

The way that you update a document can be broken up into 3 stages:

1. Start updating

Before displaying the document to be updated check if the update flag is set - look at Update on the Edit pull-down menu. If it is not flagged by a check mark set it by moving the pointer to Update and click once.

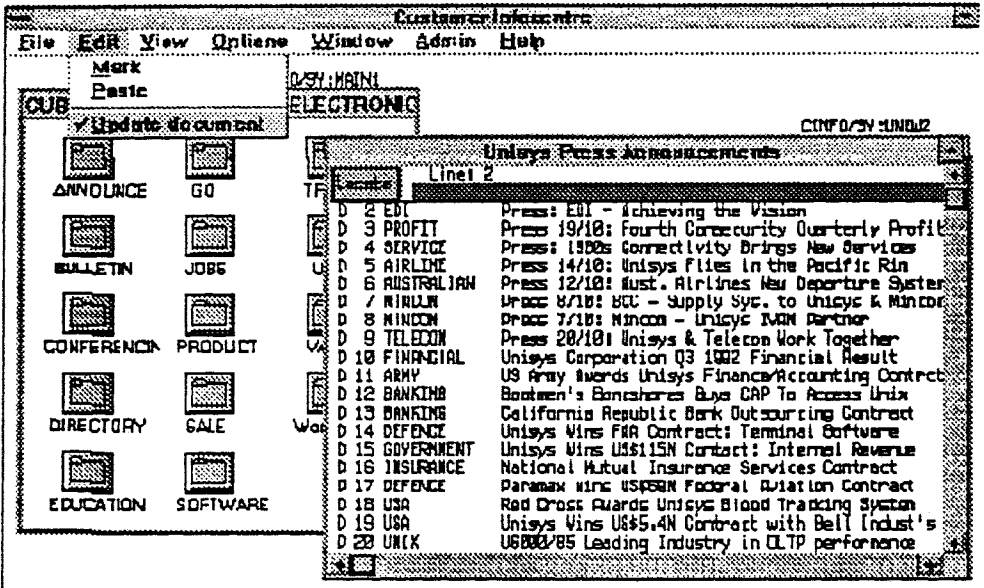


Figure 4-65 Setting the Update Flag

You may now display the document. EIC then copies the document to your workstation and displays it - so that any changes are made to the copy which you may then save or discard.

2. Editing the text.

You can edit the text on the screen by using the various editing keys and typing text directly on to the document. EIC will make changes only to the copy of the document.

The commands for editing text are under the Edit pull-down menu.

Undo

Cut

Copy

Paste

Delete

Select All

Use the pointer to mark text by placing the pointer at the required starting point, hold down the mouse button and drag the pointer to mark all the text required.

Use the View pull-down menu to set a default Tab insertion, or to set a flag for word wrap. Use the Search pull-down menu to find text or go to specific lines.

3 Saving the changed document.

After amending the document select Exit on the File pull-down menu. A pop-up dialogue box will ask if the changes are to be saved. Click on Yes to save the changes. In this case the original document will be erased and replaced with the document on your workstation.

4 Discarding the changed document.

To discard the changed document select No on the 'Save changes' dialogue box when you Exit the document. If you choose to discard it, EIC will only discard the document copied on your workstation. The original document will remain unchanged.

4.9 Forms

4.9.1 Using Forms

Forms are templates which let you mail text information in a standard format. To use a form, you should first display the form onto the screen. This will enable you to enter data into the pre-defined fields. When the form is ready to be sent, enter the command "MAIL" or select the EXPORT option from the Menu Bar. Enter the details of where and how the document is to be sent.

4.9.2 Creating Forms

To create a form you must:

- Create a blank form;
- Start updating the form;

- Complete the form specification for data fields, literal text, and special keywords;
- Set up the form Title & Options;
- Save the form.

4.9.3 Creating a Blank Form

The first step in creating a form is to move through the EIC menus to the menu in which you want to put your new form. Select the "File - New Item" option from the Menu Bar. Select from as the type of the item you wish to create. EIC will then ask you to select the InfoGroup that the form will belong to. After that, a screen will be displayed where you define how your form will appear within the menu structure of EIC. You can find more information on creating a form in the Administrator's Reference Manual under "Establishing Items on Menu Screens".

4.9.4 Starting to Update the Form

Select the form that you just created so that you can see it on the screen. Start the update process by selecting the "Edit - Update" option from the Menu Bar.

4.9.5 Completing the Form Specification

When you update the form, you will be defining how it will appear when it is used as a template for entering data. Note that when finally presented to the user, the text on the form will be protected. Changes are only allowed in the input fields. There are two steps in creating a form:

Defining the Form Layout - Establishing the data entry fields and entering the descriptive (literal) text.

Setting Up the Form Title and Options - This includes establishing the mail list and InfoGroup details.

Defining the Form Layout

- You can define data entry fields by using underline characters. The data entry fields will always hold alphanumeric information.

You can use literal text to create the field names and any other static text information for the form. Literal text will appear exactly the same on the form when it is used for data entry as it appears when the form is defined.

- Entering MAPPER & EIC reserved words.

The reserved words that you enter will be translated into actual values when the form is used for data entry.

The only EIC reserved word used for form generation is SEQUENCE\$, which is the sequence number of the document. The sequence number is generated by EIC when the document is saved in its predefined menu.

The MAPPER reserved words you can use in form generation are:

USER\$, The name of the user who entered data into the form

DATE0\$, The current date in YYMMDD format

DATE1\$, The current date in YYMMDD format

DATE2\$, The current date in DD MMM YY format

DATE3\$, The current date in YDAY format

DATE4\$, The current date in YYDAY format

DATE5\$, The current date in DDMMYY format

DATE6\$, The current date in MM/DD/YY format

DATE7\$, The current date in MONTH DD,YYYY format

DAY\$, The day of the week of the current date

STNUM\$, The station number where the form is entered.

TIME\$, The time that the form had data entered into it.

TTYPER\$, The terminal type of the terminal on which the form was entered.

4.9.6 Setting up the Form Title and Options

Select the "File - Title & Options" option from the Menu Bar to begin the process. EIC will display a data entry form which lets you specify the title and options for the form. This form lets you specify how the generated data will be sent via electronic mail, and where it will be stored (if at all).

The generated data is the document which is generated when the form is actually used. The data will include an automatically generated keyword, which will replace the reserved word SEQUENCE\$, if it is specified within the form.

The fields in the data entry form are:

- The form title, which is displayed in the menu containing the form. This is the only field which relates to the form itself. All the other fields relate to the generated data.
- What InfoGroup the generated data entered will belong to. If the data is to be mailed but not saved, then you should leave this field blank.
- What menu the generated data should appear in. If the data is to be mailed but not saved, then you should leave this field blank.
- Whether mailing details should be specified by the user after they have entered data into a form. If you enter "Y" for this field, the user data entry form is bypassed, and the default values will be used to specify where the generated data will be mailed to. If you enter "N", the user will be presented with the default values, which they can modify as necessary. The default values are the defaults for where the generated data should be mailed to.
- The subject of the generated data. This consists of a single line of text which should describe the general content of the data to the people who will receive the data.
- Whether the generated data should be sent as priority mail.

- The mailbox and directory ID of the person to whom the mail will be sent. The same mail will be sent to several other people by entering their details in the fields below the first mailbox field.
- The mailbox and directory ID of the person to whom a copy of the mail will be sent. The same mail copy will be sent to several other people by entering their details in the fields below the first mailbox field for copy.
- The MAPPER mailing list name which will be used to define the people to whom the mail should be sent.
- The MAPPER mailing list name which will be used to define the people to whom the mail copy should be sent.

4.10 Document Ageing

To manage the growing amount of information in an EIC system, you can assign any EIC menu a default lifetime. This lifetime applies only to the documents, conference & bulletin board messages within a menu. When the age of a document exceeds the lifetime specified by the menu in which it exists, that information is placed in a wastebasket area for the InfoGroup to which it belongs. It is then the responsibility of the InfoGroup owner to determine if the data should be retained or erased.

The documents stay in the wastebasket area for a further 60 days before being purged by the system.

Access to the Wastebasket Menu is obtained via the Admin pull-down menu.

The InfoGroup owner or System Administrator may reinstate a document at any time by using the Mark and Reinstate functions. (Reinstate is a function available on the Edit pull-down menu).

A Management report is available for the System Administrator to maintain an overall view of Ageing activity.

Menu items excluded from ageing are:

- Menu, Bulletin Board and Conference menus;
- Open conference items;
- Applications;
- Forms.

4.11 Wastebasket

The Wastebasket is a special menu accessible by the InfoGroup owner(s) and the system Administrator.

The EIC system uses the Wastebasket for two purposes:

- as a temporary repository for documents which have been aged off menu screens;

- as a temporary repository for ANY menu items deleted during maintenance activities.

Items in the Wastebasket are aged out of the system totally after (typically) 60 days - this ageing time is set by system parameter.

Functionality is provided to allow an Administrator or InfoGroup owner(s) to easily re-instate an item back to its original menu along with links to the item from all other menus.

To re-instate or delete item(s) from the Wastebasket command select Wastebasket on the Admin pull-down menu.

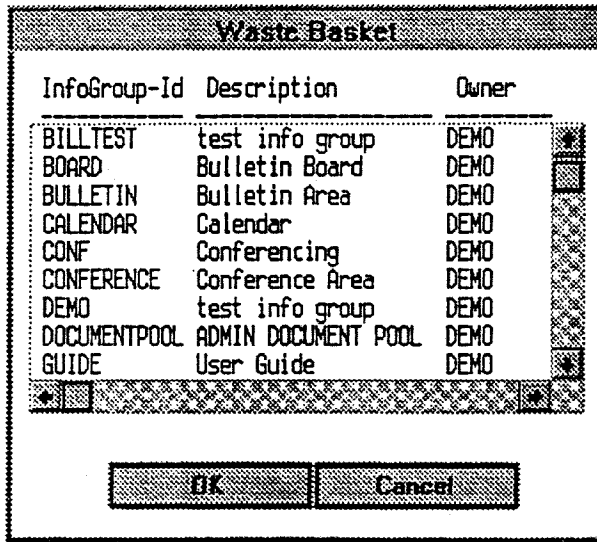


Figure 4-66 Wastebasket InfoGroup Selection

- Select an InfoGroup.
The items in the Wastebasket for the selected InfoGroup are displayed.
- Select Reinstate/Delete action on the Edit pull-down menu.

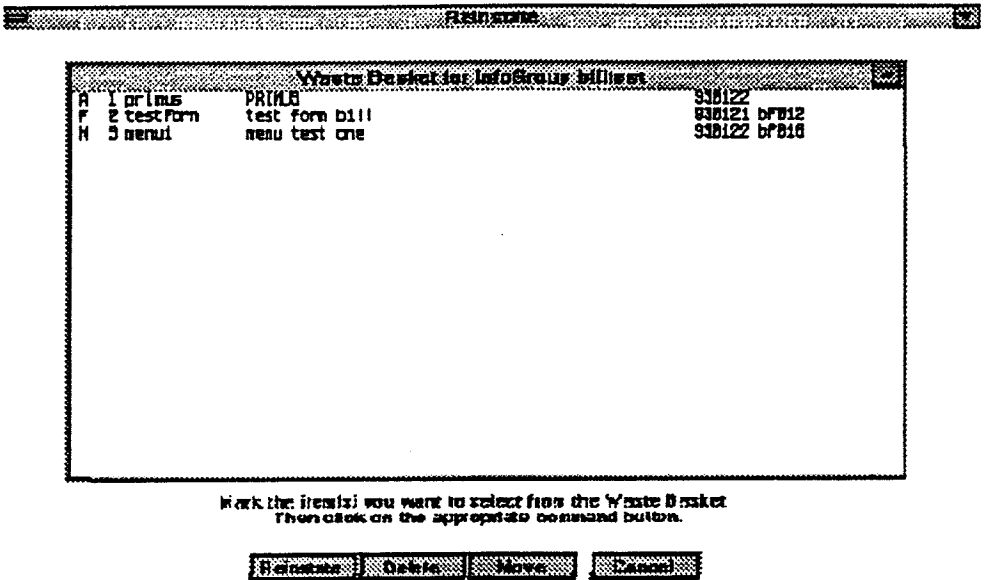


Figure 4-67 Mark the Items to Reinstate or Delete

- Select the Reinstate button to reinstate the item(s).
 - Select the delete button to delete the item(s).
- EIC will completely reinstate the item or delete it from Wastebasket.

Section 5

System Maintenance

5.1 Copying Documents and Other Items Between Menus

To copy a menu item or document to another menu.

On 'Copy From' screen:

- Select Mark on the Edit pull-down menu.
- Move the pointer to the menu or document entry to be copied. Mark item(s) to be copied, then click on the Copy button.
- Go to 'Copy To' screen.
- Select Paste in Edit pull-down menu.

The menu entry or document will now be available on the current screen.

NOTE

Documents can have high security in one menu and lower security in another. The menu security can be used to control access to the contents of the menu.

5.2 Moving Documents and Other Items

To move a menu item or document to another menu.

On 'Move From' screen:

- Select Mark on the Edit pull-down menu.
- Move the pointer to the menu or document entry to be copied. Mark item(s) to be copied, then click on the Move button.
- Go to 'Move To' screen.
- Select Paste in Edit pull-down menu.

The menu entry or document will now be available on the current screen.

5.3 Changing All or a Major Part of the Structure

In restructuring major portions of the system, a good strategy to follow is to establish a temporary menu screen or screens.

- Move all menu items (and therefore underlying tree structures) to the temporary menu screens.
- Move all isolated documents or items such as conferences to the temporary menu screens.
- Restructure the system menus as appropriate.
- Replace the saved items in the new structure.

5.4 Deleting Profiles

Profiles may be added or deleted as required, but be careful; if you delete parent profiles the siblings still exist.

Use Profile maintenance on the Admin pull-down menu. A screen with current profiles is displayed. Select Add, Change or Delete to perform the required task. Refer to 'Setting up Profiles' in the 'Setting up the System' section of this guide for more details on profile maintenance.

5.5 Date Formats

Date formats may be changed by selecting System Options entry on the Admin pull-down menu.

Select Date Format. A cascading menu of Date Formats is displayed. Select the date format required.

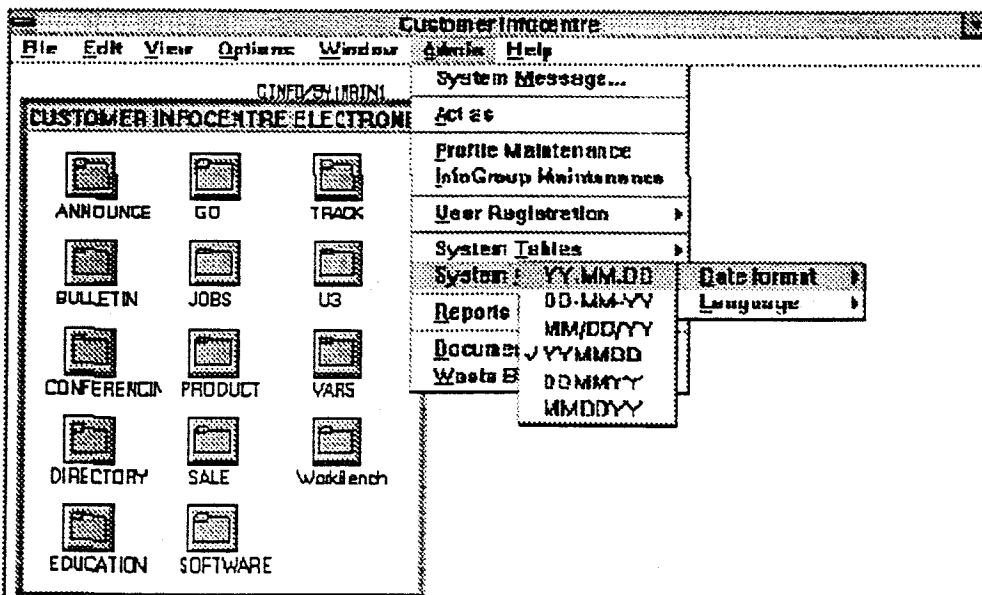


Figure 5-1 Date Format Selection

5.6 Language

Language may be changed so that screens, messages etc will be displayed in a different language. Language may be changed by selecting System Options entry on the Admin pull-down menu. Select Language - a cascading menu of languages is displayed. Select the required language.

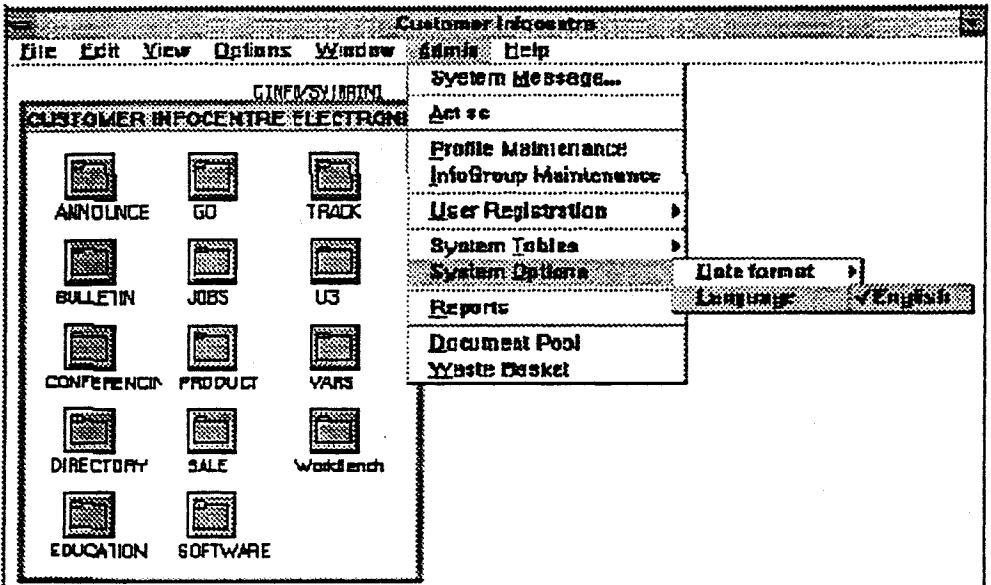


Figure 5-2 Language Selection

5.7 Display Account User Only

For example, monthly sales reports can be put into a Sales Report menu. Get your MAPPER co-ordinator to load the documents so each has its subject salesperson as the creator. Only that person will be able to access his or her individual report.

5.8 Changing Cost Codes

e.g. a department closes down.

- List all users.
- Change their cost codes.

5.9 Someone Else's View - Act As

Whenever an administrator establishes or changes a user's access rights or needs to confirm that established security is correct, it is necessary to check that what has been done is correct.

To achieve this, an administrator may 'act as' any other user for which they have responsibility.

Select Act As on the Admin pull-down menu.

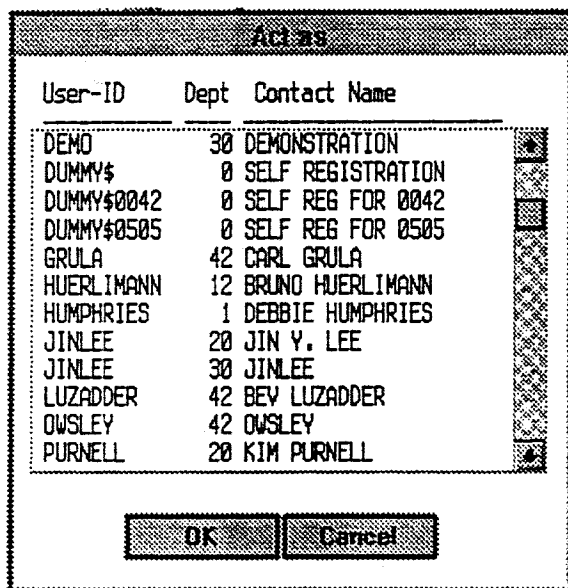


Figure 5-3 'Act As' Another User

From the List box of User-IDs select the User-ID required.

5.10 Changing Job Profiles, e.g. Reorganisation

- Print all users with profiles that are to be changed;
- Change their profiles;
- List all screens with old profiles;
- Change them.

5.11 Changing Information Owner, e.g. Someone Leaves

- List all for his/her InfoGroup;
- Change name;
- Check InfoGroup members as well.

5.12 Changing Screen Attributes

Move to the menu, document or bulletin whose attributes require change, eg; add User-ID for menu maintenance.

Go to the File pull-down menu and select Title & Options.

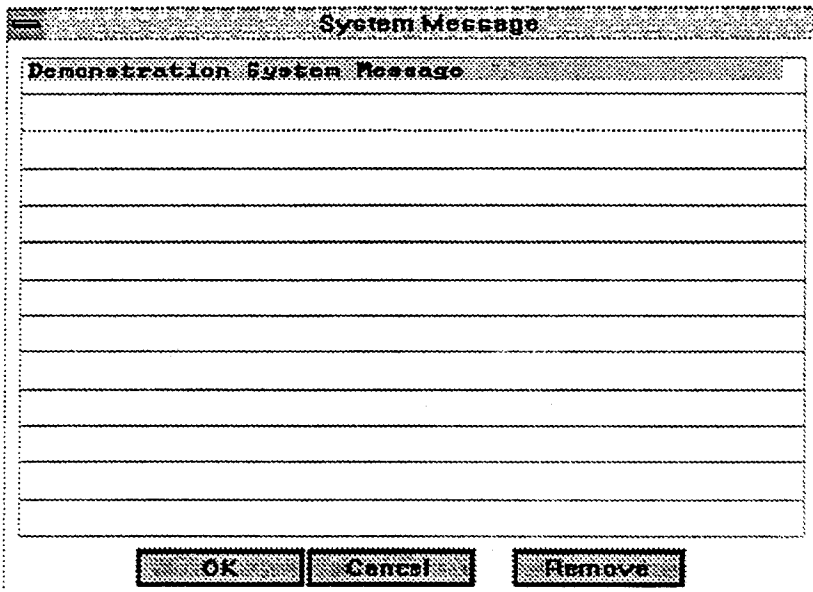
Make the necessary changes then click on the OK button or TRANSMIT.

Access security may also be changed via the File pull-down menu.

5.13 System Message

This facility can be used to send a system message to all users.

Select System Message from the Admin pull-down menu. An input screen is displayed.



The screenshot shows a window titled "System Message". Inside the window, there is a text input area with the text "Demonstration System Message" on the first line, followed by 12 empty lines. At the bottom of the window, there are three buttons: "OK", "Cancel", and "Remove".

Figure 5-4 System Message Screen

Enter or update text as required (up to 13 lines)

When finished select the OK button or press Xmit.

The message will be available to users under the News action on the Window pull-down menu. It will be displayed as a pop-up message box.

Use the Remove button to remove a system message.

5.14 Document Pool

Document Pool is a menu set up to catch documents coming into the system which are directed at menus which do not exist, or are sent by users who do not have appropriate access security. Such documents may have been sent from other or remote systems by the Createdoc function.

The Administrator can look at what has been captured in the document pool area and decide which menu to copy it to or perhaps to delete the item.

To access the document pool select Document Pool on the Admin pull-down menu. The document pool menu looks like any other menu.

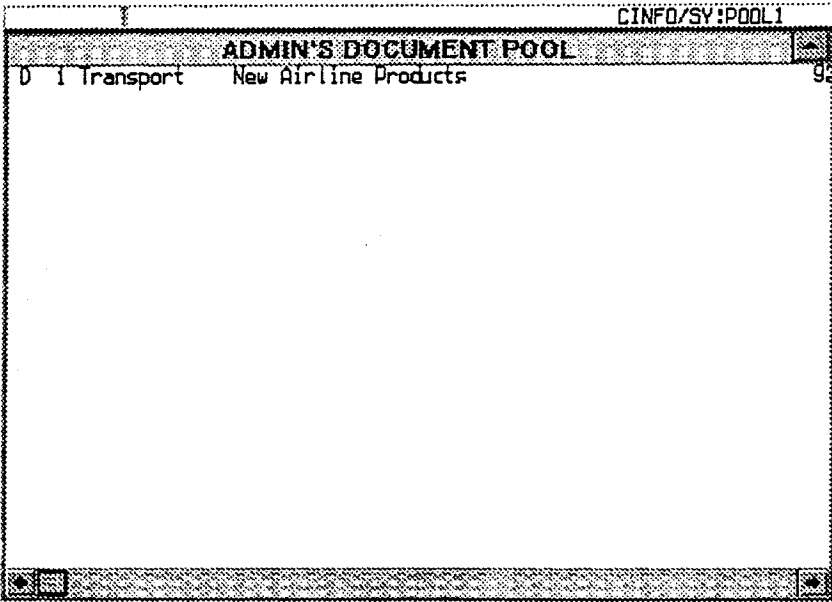


Figure 5-5 Document Pool Menu

Use the move, copy and delete functions to relocate the items in the document pool to the appropriate menus.

Section 6

Account & Application Registration

6.1 Account and Application Registration

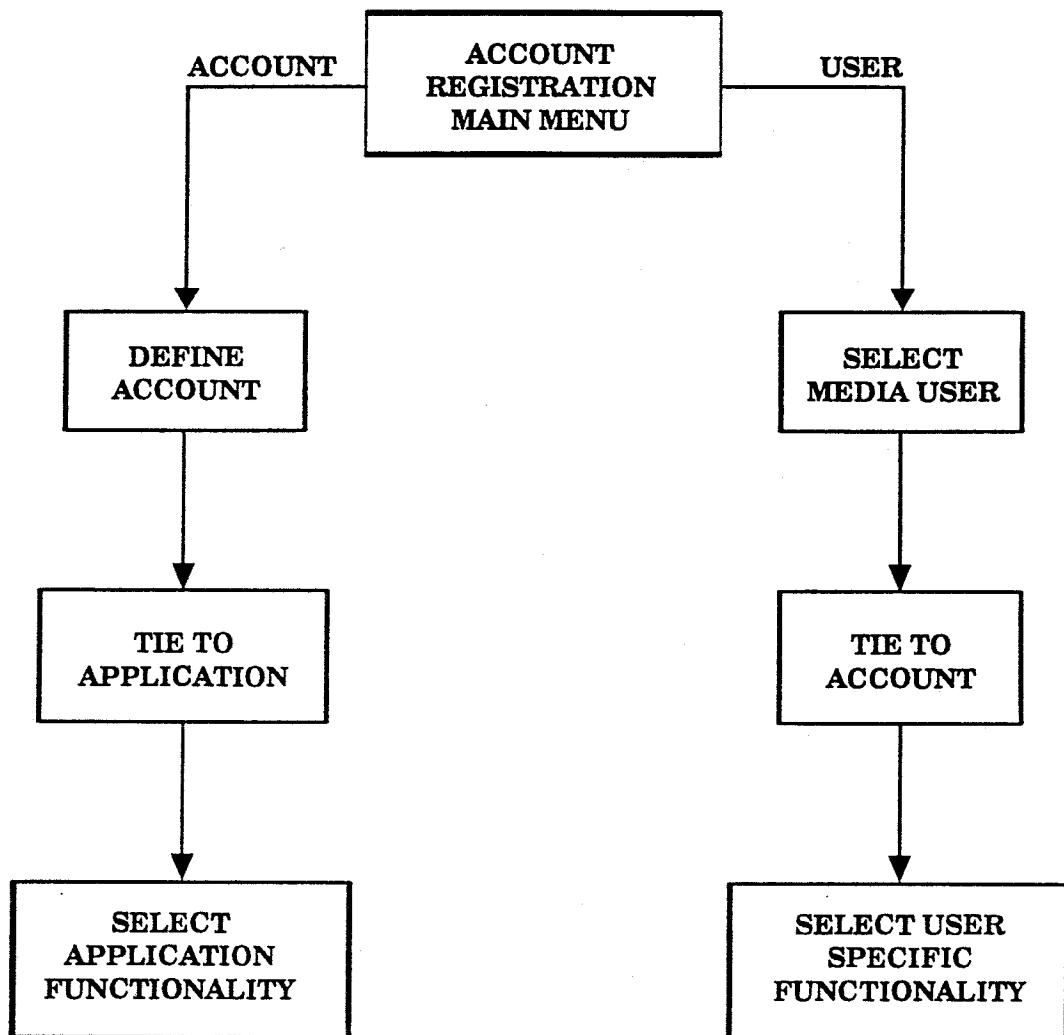


Figure 6-1 Account & Application Registration

This process is necessary where access control must be established to specific applications on an account by account basis. An example of this requirement is where the EIC application is utilised as a bulletin board system with user entitlement being subject to contract.

Establishing a New Account and Application

This is done in four separate steps and is variable dependent on the specific registration requirements of the application being established.

These steps are:

- Define the Account.
- Tie the Account to the Application.
- Tie a User to the Account.
- Tie the User to the Application(s) within the Account.

6.1.1 Accessing the Account Registration Module

Select User Registration on the Admin pull-down menu. Then on the User Registration pop-up, select Maintain User Account and Applications.

```
AMC/SY:MAIN1      AMIC: Australian Marketing Information Centre   Ln: 1 of 12
File  Edit  View  Options  Admin  Help                               16:06:08

A 1 BOOKINGS      Booking System
M 2 DEPARTMENTS  Unisys Australia Departments on AMIC
M 3 GO            Index of items in AMIC
M 4 GRAPHICS     Mapper Graphics
      USER - User Registration
      Position the cursor at the function you want. (e ^ to return)
      Then press the transmit key.                |2SM
      -----
       Add, Delete or Change User Information
       Maintain User account and Applications
      -----
      Bottom

Command User _____ 12Cancel
1      2      3Exit 4Refresh 5      6      7      8      9      10
```

Figure 6-2 Registration Selection Pop-up

The main menu of the Account/Application registration module will now be displayed.

```

EIC/SY:MAIN          MAINTAIN USER ACCOUNT AND APPLICATION MAIN MENU          16:57:55
FILE    VIEW    HELP

|Remove User      : Transmit at Account#
|Reg New User    : Transmit at User-ID (Fast path: Enter Acc #)      More : +
|Mtn User In App: Transmit at User-ID (Fast path: Enter App)
|Mtn Account     : Press FKS (Fast path: Enter "FKS,Acc#[,App]" in command line)

|-----|
| User-ID      | User Name          | Org | CCC | Account | Application |
|-----|-----|-----|-----|-----|-----|
| ABDI         | - Iqtedar Abdi    | 0505 | 0510 | test1   | -           |
| ABEL         | - Mike Abel       | 0505 | 0682 | test1   | -           |
| ABERNETHY    | - Sandra Abernathy | 0505 | 0702 |         |             |
| ADAMS        | - David Adams     | 0505 | 0005 |         |             |
| ADMIN        | - System Administrator | 0505 | 0810 |         |             |
| AFFAT        | - Laura Affat     | 0505 | 0033 |         |             |
| ALEX         | - Alex Stevenson  | 0505 | 0810 | TEST2   | -           |
| ANDERSON2    | - John Anderson   | 0505 | 0312 |         |             |
| ANTHONY      | - Barbara Anthony | 0505 | 0720 |         |             |
| ATKINSON     | - Tricia Atkinson | 0505 | 0611 |         |             |
|-----|-----|-----|-----|-----|-----|
| Command  |-----|-----|-----|-----|-----|
|1Help  2      | 3Exit  4Refrsh 5MntAcc 6Mark  7      8Fwd  9      |12Cancel 10Action
  
```

Figure 6-3 Account & Application Registration - Main Menu

Each user registered in EIC will be listed in this module.

For each user, note the following details:

- User ID - Mapper User-ID of the user.
- User Name
- Organisation number
- Cost Centre number
- Account name to which User is tied

Note the following functionality:

An input field adjacent to the User-ID allows access for tying the User-ID to an account.

An input field adjacent to the Account field is used in the User-ID removal process.

An input field for Application name is used in tying account to application.

Function Key 5 (F5) is used for Account maintenance.

6.1.2 Defining a New Account

Select Function Key 5 (F5) on main menu to access the Account list.

```

EIC/SY:MTNACC          MAINTAIN ACCOUNT
FILE    HELP                               10:30:31

Account Detail : Press Transmit at Account Entry
Remove Account : Press Transmit under Row      More : +
Register Account : Press F6

A/C ID      Name                Start  End    Review Create Update  Row
-----
os1100 - profile os1100          911031 921231 921020 911108 911108 -
ADVANCE - Advance Bank          911002 921231 920131 911002 911002 -
CATHAY - CATHAY                 911018 911130 911130 911018 911018 -
CITICORP - Citibank             911001 921231 920131 911001 911001 -
DASACT - Dept Admin Serv ACT    911001 921231 920131 911001 911001 -
Fordanst - Ford Australia       911001 921231 920131 911001 911001 -
jowl - jow test                 911101 911231 911215 911107 911107 -
Jul/Ans - From Julian          901201 921201 921201 911203 911203 -
Jul/Pace - From Julian         901201 921201 921201 911203 911203 -
mtisa - Mt Isa Mines           911001 921231 920131 911001 911001 -
nswattge - NSW Attorney General 911002 921231 920131 911002 911002 -

More..
Command  _____ 12Cancel
1Help 2 3Exit 4Refresh 5Copy 6Addacc 7 8Fwd 9Main 10
    
```

Figure 6-4 The Account List

Account details may be copied from an existing Account by moving the cursor to the desired account name then selecting Function Key 5 (F5).

To add a new account, select Function Key 6 (F6).

The New Account entry pop-up will be displayed. Details for up to 6 new accounts may be entered at this time. Once necessary fields are completed, transmit to save and return the main account list.

```

EIC/SY:MTNACC          MAINTAIN ACCOUNT
FILE    HELP                               10:30:31

Account Detail : Press Transmit at Account Entry
Remove Account : Press Transmit under Row      More : +
Regis          NEW ACCOUNT
| Enter New Account Data and press Transmit to register
A/C I|
-----|SQ Identity Name                Start  End    Review
os11|01 [TEST001 ] [Documentation Test ] [920201] [920202] [920202]
ADVAN|02 [ ] [ ] [ ] [ ] [ ] [ ]
CATHA|03 [ ] [ ] [ ] [ ] [ ] [ ]
CITIC|04 [ ] [ ] [ ] [ ] [ ] [ ]
DASAC|05 [ ] [ ] [ ] [ ] [ ] [ ]
Forda|06 [ ] [ ] [ ] [ ] [ ] [ ]
jowl |
Jul/A|Note : Date should be in format YYYYDD
Jul/P|
mtisa - Mt Isa Mines           911001 921231 920131 911001 911001 -
nswattge - NSW Attorney General 911002 921231 920131 911002 911002 -

More..
Command  _____ 12Cancel
1 2 3Exit 4Refresh 5 6 7 8 9 10
    
```

Figure 6-5 New Account Entry Pop-up

6.1.3 Account Maintenance - Review Dates

On the main account list, type in the Account Name on the Command Line or roll to select the account. This will cause the maintenance screen for the selected account to be displayed.

```

EIC/SY:MTNAPP      MAINTAIN APPLICATION IN ACCOUNT      10:39:09
FILE      HELP

Display detail      : Press Transmit at Application entry
Remove Application  : Press Transmit under Rmv
New Application     : Press F6
Maintain A/C Date  : Press F5

Account Number TEST001      Name Documentation Test
      Start 920201      End 920202

Application      Start      End      Review      Create      Last
-----      -----      -----      -----      -----      -----
                                         Update      Rmv
                                         -----      ---

Bottom
    
```

```

Command 
1Help 2      3Exit 4Refrsh 5AcDate 6Addp 7      8      9Main 10      12Cancel
    
```

Figure 6-6 Account Maintenance Screen

To maintain the account action and review dates, select Function Key 5 (F5) on the Account Maintenance Screen. The Account Review Pop-up will be displayed. Alter the details as required and TRANSMIT. On completion, the Application Maintenance Screen will be redisplayed.

```

EIC/SY:MTNAPP      MAINTAIN APPLICATION IN ACCOUNT      10:39:09
FILE      HELP

Display detail      : Press Transmit at Application entry
Remove Application  : Press Transmit under Rmv
New Application     : Press F6
Maintain A/C Date  : Press F5

Account Number TEST001      Name ACCT05      TEST001
      Start 920201      End      Enter new date and press transmit to amend
                                         Date format is YYMMDD
      Creation : 920114      Last Update : 920114

Application      Start      Account Name ..... [Documentation Test ]
-----      -----
                                         Start Date ..... [920201]
                                         End Date ..... [920202]
                                         Review Date ..... [920202]

Command 
1      2      3Exit 4Refrsh 5      6      7      8      9      10      12Cancel
    
```

Figure 6-7 Account Review Date Pop-up

6.1.4 Tie the Account to the Application

Select Add Application Function Key 6 (F6).

The New application pop-up will be displayed. Enter the application name to be registered (in this case 'MIP'). Note that the start, end and review dates may be altered at this time. For first time through, default dates are taken from the Account registration process.

```
EIC/SY:MEMAPP      MAINTAIN APPLICATION IN ACCOUNT
FILE      HELP                                           10:46:47
```

Display detail	:	Press Transmit at Application entry			
Remove Application	:	Press Transmit under Rmv			
New Application	:	Press F6			
Maintain A/C Date	:	Press F5			
Account Number	TEST001	Name	ACCT04	TEST001	
Start	920201	End	Enter new Application data and press		
Application	Start	Transmit to register			
-----	-----	Application Name	[]
		Sub Account Code	[] (if any)
		Start Date	[920201]	
		End Date	[920202]	
		Review Date	[920202]	

Command

1	2	3Exit	4Refresh	5Prompt	6	7	8	9	10Cancel
---	---	-------	----------	---------	---	---	---	---	----------

Figure 6-8 New Application Pop-up

Enter the data then press TRANSMIT. The application will now show up on the Account Maintenance Screen. Note that there are two entry fields for the Application. The field alongside the application name allows setup of the application specific details. The RMV (remove) field removes the application from this account, once the application specific details have been reset.

```

EIC/SY:MEHAPP      MAINTAIN APPLICATION IN ACCOUNT      10:51:02
FILE      HELP

| Display detail      : Press Transmit at Application entry
| Remove Application : Press Transmit under Rmv
| New Application    : Press F6
| Maintain A/C Date  : Press F5
|
| Account Number TEST001      Name Documentation Test
|      Start 920201      End 920202
|
|      Application      Start      End      Review      Create      Last
|      -----      -      -      -      -      -      -
|      mip              - 920201  920202  920202  920114  920114  -
|
| Bottom

```

```

Command 
1Help  2      3Exit  4Refrsh 5AcDate 6AddAp 7      8      9Main 10      12Cancel

```

Figure 6-9 Application Registered for Account

6.1.5 Define Application Specific Details

Each application may have specific details necessary to be supplied for proper functioning or to identify the specific facilities and functionality to be attached to the account.

To establish the application specific details (in this case for the MIP - Mapper Interface to PRIMUS application), tab to the entry field for the selected application and TRANSMIT.

Account & Application Registration

The MIP account profile screen will be displayed. Specific functionality will be added to this screen for use by the account.

```

EIC/SY:ACCT01      MAINTAIN ACCOUNT PROFILE IN MIP
FILE VIEW HELP                                10:59:09

Remove Specific : Enter Y Alongside and Press Transmit
Add Specific : Press F6
Amend Appl Date : Press F5

Appl : Start 920201 End 920202 Review 920202
Account : ID TEST001 Name Documentation Test
<----- Primms ----->
Site Id Application Library Doc Type Start Rmv
-----
Bottom
  
```

```

Command □
1Help 2Set 3Exit 4Refresh 5ApDate 6Add 7 8 9Main 10Action 12Cancel
  
```

Figure 6-10 MIP Account Profile Screen

To add specific functionality for MIP, select Function Key 6 (F6). It is possible to tailor functionality to a sub-account. Select Function Key 5 (F5) for this. MIP is the PRIMUS access application and requires a number of separate document selections. These could be entered one at a time using the ADD SPECIFIC pop-up window.

```

EIC/SY:ACCT01      MAINTAIN ACCOUNT PROFILE IN MIP
FILE VIEW HELP                                13:19:46

Remove Specific : Enter Y Alongside and Press Transmit
Add Specific : Press F6
Amend Appl Date : Press F5

Appl : Start 920201 End 920202 Review 920202
Account : ID TEST001 Name
<----- Primms ----->
Site Id Application Library Doc Type Start Rmv
-----

ACCT02 ADD MIP SPECIFIC TO ACCOUNT
Enter specific and Press Transmit
Primms Site ID ....[SY- ]
Primms Appl .....[PRIMUS ]
Library .....[A-SERIES ]
Doc Type .....[ ]
Start Date .....[920201] YMMDD
  
```

```

Command □
1 2 3Exit 4Refresh 5Prompt 6 7 8 9 10 12Cancel
  
```

Figure 6-11 MIP-Specific Functionality Pop-up

To add multiple documents, select Function Key 5 (F5) PROMPT. This provides a pop-up window which displays the possible documents available via MIP. Any of these can be selected by tabbing to them and transmitting, or multiple selections may be made by entering '/' in each entry field. Transmit or Roll (Function Key 8) F8 saves the selection. When selections are finished, selecting Function Key 6 (F6) creates the document list.

```

RUC/SY:ACCT01      MAINTAIN ACCOUNT PROFILE IN MIP
FILE  VIEW  HELP                                     13:19:46

----- PROMPT -----
| Press Transmit at entry for single select |
|-----|
| Application Library Document |
| PRIMUS ASERIES CHG - |
| PRIMUS ASERIES FILE - |
| PRIMUS ASERIES UCF - |
| PRIMUS B1000 CHG - |
| PRIMUS B1000 FILE - |
| PRIMUS B1000 UCF - |
| PRIMUS COM CHG - |
| PRIMUS COM FILE - |
| PRIMUS COM UCF - |
| PRIMUS FINANCIAL CHG - |
|-----|
| Note : Enter "/" along entry for multiple |
| selection and Press FK6 to create |

Command 
1 2 3Exit 4Refresh 5 6 7 8Fwd 9 10 12Cancel
    
```

Figure 6-12 Example Document Selection for MIP

On returning to the MIP account profile screen, the selected functionality is displayed.

```

RUC/SY:ACCT01      MAINTAIN ACCOUNT PROFILE IN MIP
FILE  VIEW  HELP                                     13:19:46

----- PROMPT -----
| Press Transmit at entry for single select |
|-----|
| Application Library Document |
| PRIMUS ASERIES CHG / |
| PRIMUS ASERIES FILE / |
| PRIMUS ASERIES UCF / |
| PRIMUS B1000 CHG / |
| PRIMUS B1000 FILE / |
| PRIMUS B1000 UCF / |
| PRIMUS COM CHG / |
| PRIMUS COM FILE / |
| PRIMUS COM UCF / |
| PRIMUS FINANCIAL CHG - |
|-----|
| Note : Enter "/" along entry for multiple |
| selection and Press FK6 to create |

Command 
1 2 3Exit 4Refresh 5 6 7 8Fwd 9 10 12Cancel
    
```

Figure 6-13 Selected MIP Functionality Assigned to the Account

The necessary actions to tie the selected application to the account are now completed. Return to registration main menu for the next step - selecting Function Key 9 (F9) returns to the main screen.

6.1.6 Add User to an Account

Select the user to be added. In this case select 'ADAMS'.

Tab to the user entry then TRANSMIT. The account list will be displayed. Roll the window to locate the account, tab to the account entry then TRANSMIT.

The user 'ADAMS' is now tied to the account - in this case Account Number TEST001.

```
RIC/SY:MAIN          MAINTAIN USER ACCOUNT AND APPLICATION MAIN MENU
FILE   VIEW   HELP                                     13:38:53

|Remove User      : Transmit at Account#
|Reg New User    : Transmit at User-ID (Fast path: Enter Acc #)   More : +
|Mtn User In App: Transmit at User-ID (Fast path: Enter App)
|Mtn Account     : Press Fk5 (Fast path: Enter "FK5,Acc#[,App]" in command line)

|-----|
| User-ID      | User Name          | Org  CCC  | Account | Application |
|-----|-----|-----|-----|-----|-----|
| AEDI         | - Iqtedar Abdi    | 0505 0510 | test1   | -           |
| ABEL         | - Mike Abel       | 0505 0682 | test1   | -           |
| ABERNETHY    | - Sandra Abernethy | 0505 0702 |         | -           |
| ADAMS        | - David Adams     | 0505 0005 | TEST001 | -           |
| ADMIN        | - System Administrator | 0505 0810 |         | -           |
| AFFAT        | - Laura Affat     | 0505 0033 |         | -           |
| ALEX         | - Alex Stevenson  | 0505 0810 | TEST2   | -           |
| ANDERSON2    | - John Anderson   | 0505 0312 |         | -           |
| ANTHONY      | - Barbara Anthony | 0505 0720 |         | -           |
| ATKINSON     | - Tricia Atkinson | 0505 0611 |         | -           |
|-----|-----|-----|-----|-----|

Command  More..
1Help  2          3Exit  4Refresh 5MntAcc 6Mark  7          8Fwd  9          12Cancel
10Action
```

Figure 6-14 User 'ADAMS' tied to Account TEST001

A quicker method of achieving this is to type the account number directly alongside the user entry.

6.1.7 Adding User-Specific Facilities in Account

The facilities added and the screens used are completely application dependent. The example described here applies only to the MIP application.

Select user entry.

Select Application on Application Selection Pop-up. In this case it will be for the MIP application which requires selection of the initial document to be displayed on entry and the document types this particular user may access.

On Application User Profile Screen for MIP, select Function Key 6 (F6), Select All to add all selections or alternatively type 'y' against each selection then TRANSMIT.

The next screen to be displayed allows the administrator to nominate the document which will be displayed for this user on initial entry to MIP. If nothing is selected, the system makes the first document entry the default.

6.2 Deleting Items From the Registration System

6.2.1 Disconnecting a User from an Account

The first step is to delete the User Application specific functions. On the main menu, enter the application name in the blank field alongside the nominated user's entry.

Alternatively, tab to the menu entry for the user and select the application name from the Application pop-up menu. Note if the user is to be completely removed, the process must be repeated for each application to which the user has been attached.

On the Application User Profile Screen, select Function Key 6 - Delete Application on Function key set 2. Delete each of the user specific items.

When completed, return to the Application pop-up window, then back to the main menu.

To finally delete the user from the Account registration system, transmit at the Application entry field for the user.

6.2.2 Disconnecting an Application from an Account

On the main menu, select Function Key 5 (FK5) - Maintain Application.

Enter the Application name in the Command field or select the required Account name from the list then TRANSMIT.

On the Account functionality maintenance screen (Maintain Application in Account), for each application registered, tab to the Application entry field and delete the Application -specific selections. Note that this step is application dependent.

Once the Application-specific selections have been deleted, return to the Application functionality maintenance screen and tab to the Application remove (RMV) field then TRANSMIT. This will delete the Application connection.

6.2.3 Deleting an Account

Select Function Key 5 (FK5) on the main menu - Maintain Account.

Tab to the remove field (RMV) and TRANSMIT.

Section 7

Management Reports

7.1 The Basic Reports

The following Management Reports are provided as part of the basic EIC deliverable.

- User Profile Report.
- Resource Utilization Report.

The Management reports may be accessed via the Admin pull-down menu and choosing Reports.

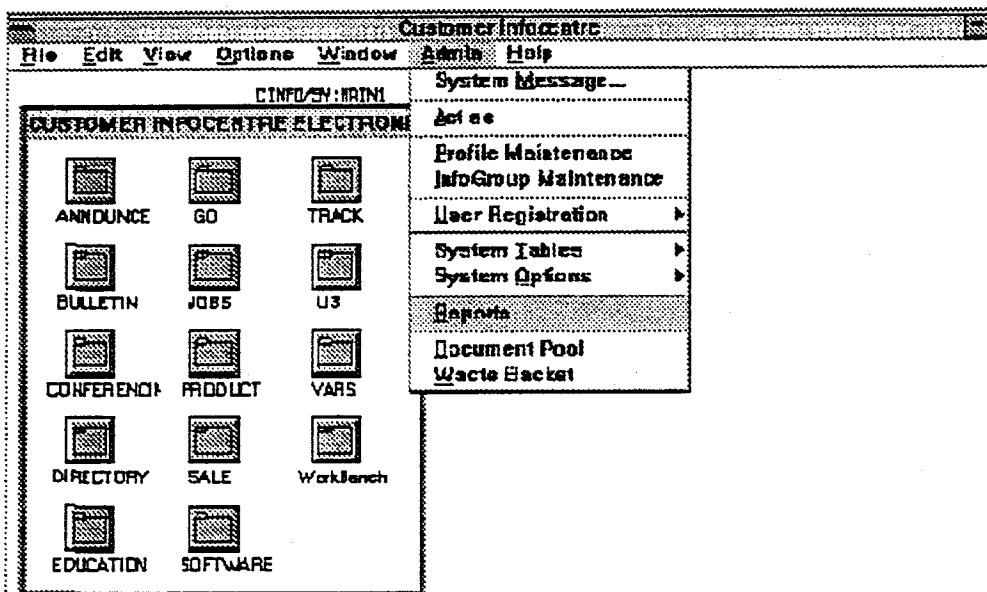


Figure 7-1 Admin pull-down Report Selection

Management Reports

The system will display a selection window, select the required report then TRANSMIT.

```

EIC/SY:MAINF1      AMIC: Australian Marketing Information Centre      Ln: 1 of 12
File Edit View Options |Admin | Help                               15:10:04 □
                                REPORTS - Management Reports
-----
M 1 BOOK      | Press Transmit Key with cursor positioned to the |
M 2 DEPARTMENTS | Subject you want.                               |
M 3 GO      | -----|
M 4 GRAPHICS |  Report - Profile And Associated User |
M 5 INDUCTION |  Report - Resource Utilization |
A 6 INFOCENTRE |  Report - Operation |
A 7 MAP25M |  Chart - Resource Utilization |
A 8 OLD-AMIC |  Chart - Operation |
M 9 PRESS
M 10 SELL
M 11 SYSTEMS
M 12 WORKBENCH
-----
Command □
1 2 3Exit 4Refresh 5 6 7 8 9 10 Bottom 12Cancel

```

Figure 7-2 Management Report Selection Window

7.2 Profile and Associated User Report

Two options are presented:

- A summary report; this details the Parent and Child profiles in use and the number of users registered in each.
- Report by specific User Profile.

7.2.1 Summary Report

```

EIC/SY:MRPRO01      Profile Summary 92/02/14      Ln: 1 of 155
File View Options Help                               16:02:41 □
-----
EIC/SY Management Report <|
MRPRO01 Profile Summary As At 92/02/14
-----
SEQ Parent Prof Profile Description No. Of User
-----
1 ADMIN AMIC Administrator 2
2 ADMINIS Unisys Administrators 0
3 AMIC AMIC-Public User 3
4 AMIC-ADMIN AMIC-ADMIN 2
5 AUSTRALIA Australia 2
6 BA Branch Administrator 3
7 BD Business Development 0
8 BM Branch Managers 5
9 BR-ADMIN BR-ADMIN 1
10 BR-SUPPORT Branch Support Managers 2
11 BSM Branch Support Managers 0
12 BUS-PLAN-MGR Business Planning Managers 0
-----
More..
Command □
1Help 2 3Exit 4Refresh 5 6Right 7 8Fwd 9Main 10Action

```

Figure 7-3 Profile Summary Report

7.2.2 Nominated Profile Report

On selecting this report, a selection window is presented. To select the Profile(s) required, enter '/' character in the field associated with each Profile, then TRANSMIT. (Rolling forward saves the selection.)

```

EIC/SY:MRPRO01          Profile Summary 92/02/14          Ln: 1 of 155
File  View  Options  Help                               16:02:41 □
-----
EIC/SY M| Enter choice of report.  Then press transmit key. |
MRPRO01  Profile Sum|-----|
|
| SEQ Parent      Management Report - MRPRO02
|-----|-----|
| 1              | Enter / to select profile.  FKS to next page if applicable.
| 2              | Press transmit to produce report.
|-----|-----|
| 3              | ADMIN  - ADMINIS  - AMIC    - AUSTRALIA
| 4              | BA     - BA-ACT   - BA-NSW-CT - BA-NSW-FIN
| 5              | BA-NSW-FIN2 - BA-NSW-PS  - BA-NSW-VAM - BA-QLD
| 6              | BA-SA   - BA-TAS    - BA-VIC-CT  - BA-VIC-FIN
| 7              | BA-VIC-PS - BA-WA     - ED         - ED-FGD
| 8              | ED-NSW  - ED-QLD    - ED-VIC     - EM
| 9              | EM-ACT  - EM-NSW-CT - EM-NSW-FIN - EM-NSW-FIN2
| 10             | EM-NSW-PS - EM-NSW-VAM - EM-QLD     - EM-SA
| 11             | EM-TAS  - EM-VIC-CT - EM-VIC-FIN - EM-VIC-PS
| 12             | EM-VIC-UT - EM-VIC-VAM - EM-WA      - BR-SUPPORT
|-----|-----|
| Command □                                           More..
| 1          2          3Exit 4Refresh 5          6          7          8Fwd  9          10Cancel

```

Figure 7-4 Nominated Profile Report

The following report details are presented by the system

```

EIC/SY:MRPRO02          Nominated Profiles 92/02/14          Ln: 1 of 15
File  View  Options  Help                               16:05:20 □
-----
EIC/SY Management Report
MRPRO02  Nominated Profiles As At 92/02/14
|
| Parent Prof  Profile  - - - - - U S E R  N A M E - - - - -
|-----|-----|-----|-----|
|          ADMIN  Sharon Boler  Alex Stevenson
|          ADMIN  - AMIC Administrator  Total = 2
|
| BA          BA-NSW-FIN2 - BA-NSW-FIN2  Total = 0
|
| BA          BA-TAS    Patricia Curran
| BA          BA-TAS    - BA-TAS  Total = 1
|
|          ----- END OF REPORT MRPRO02 -----
|
| Command □                                           Bottom
| 1Help  2          3Exit 4Refresh 5          6Right 7          8          9Main 10Action

```

Figure 7-5 Nominated Profile Report

7.3 Resource Utilization

The objective of this report is to provide system usage details (in MAPPER terms) for charge-out purposes.

Individual reports may be selected as follows:

- Summary by InfoGroup.
- Details by Nominated InfoGroup.
- Details by Organisation and Cost Centre.

A 12 month history is also available from the selection window.

7.3.1 Summary by InfoGroup

```
EIC/SY:MRUTL01      Utilization Summary By InfoGroup 92/02/14      Ln: 1 of 85
File  View  Options  Help                                     16:09:27 □
```

EIC/SY Management Report				
MRUTL01 Utilization Summary By InfoGroup As At 92/02/14				
Info Group	Orga Code	Cost Cntr	----- T o t a l -----	
			Lines	Bytes (K)
DOCUMENTPOOL	0000	0000	35	4.07
HELP	0000	0000	37	4.28
MAIN	0000	0000	198	20.44
MMENU	0000	0000	679	83.78
NEWS	0000	0000	105	11.56
PATC	0505	0173	69	8.01
SOFTWARE	0505	0211	115	11.80
SYNERCOM	0505	0250	18	2.25
2200-PM	0505	0312	36	4.17
ASERIES-PM	0505	0312	36	4.17
PC-PM	0505	0312	36	4.17

Command □ More..

1Help 2 3Exit 4Refresh 5 6Right 7 8Fwd 9Main 10Action 12Cancel

Figure 7-6 Detail Summary by InfoGroup

7.3.2 Summary of Nominated InfoGroup

A selection window detailing all available InfoGroups will be displayed. Enter '/' character in the input window for each report required, then TRANSMIT. Note that the selections are saved if the window is rolled forward.

```

EIC/SY:MRUTL01      Utilization Summary By InfoGroup 92/02/14      Ln: 1 of 85
File  View  Options  Help                               16:09:27  □

Resource Utilization
MRUTL01 | Enter choice and press transmit key at date of report you want. |
-----|-----|
Management Report - MRUTL02
Inf | Enter / to select InfoGroup. FKS to next page if applicable. |
---| Press transmit to produce report. |
DOC |-----|
HEL / 2200          2200-PM          ACC-REC          ACCOUNTING
MAI | ADMIN          ASD          ASERIES          ASERIES-PM
MDM | ASIA          AUSTRALIA        BAD          BARINA
HEW | COMMS          CONF          CONNECT          CTOS
PAT | CTOS-PM        DATABASES        DOC          DOCUMENTPOOL
SOF | EDI          EDUCATION        F&A          FINANCE
SYN | FLASH          GOVT          HELP          HR
220 | INDEX          INDUCTION        INFOCENTRE      INFOIMAGE
ASE | INFORMIX        LEGAL          LINC          LOB-MKTG
PC- | M-SYNERCOM      MAIN          MAPPER          MKTG
-----|-----|
More..
Command □                               12Cancel
1      2      3Exit  4Refrsh 5      6      7      8Fwd  9      10
    
```

Figure 7-7 InfoGroup Selection Window

The summary report is displayed, giving details of MAPPER usage for the selected InfoGroup(s).

```

EIC/SY:MRUTL02      Utilization By InfoGroup 92/02/14      Ln: 1 of 18
File  View  Options  Help                               16:13:28  □

EIC/SY Management Report
MRUTL02 | Utilization By InfoGroup As At 92/02/14 | <
-----|-----|
Info Group  Orga Cost      D      Count      Average
Code Cntr  Cab R Siz Type  Report  Total Ln  Ln / Rpt
-----|-----|
2200      0505 0681  028 B 100 MISC      2      85      43
2200      0505 0681  028 E 080 DOCU      1      2      2
2200      0505 0681  028 H 100 SCRN      4      69      17
2200      0505 0681  028 I 132 DOCU      1      20      20
2200      InfoGroup Total = 176 Lines ( 20.30 K Bytes)
-----|-----|
More..
Command □                               12Cancel
1Help  2      3Exit  4Refrsh 5      6Right 7      8Fwd  9Main 10Action
    
```

Figure 7-8 Nominated InfoGroup MAPPER usage details

7.3.3 Details by Organisation and Cost Centre

The following report is displayed.

```

EIC/SY:MRUTL03      Utilization By Org & CCC 92/02/14      Ln: 18 of 329
File  View  Options  Help                               16:18:09 □

MRUTL03      Utilization By Org & CCC As At 92/02/14      <|
-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
Orga Cost      D      ----- Count -----      Average
Code Cntr  Cab R  Siz Type  Report  Total Ln  Ln / Rpt
-----|-----|-----|-----|-----|-----|-----|-----|-----|
0505 0173  028 B 100 MISC      2        17          9
0505 0173  028 E 080 DOCU      2          4          2
0505 0173  028 H 100 SCRN      3         48         16
0505 0173      CCC Total =      69 Lines (      8.01 K Bytes)

.EJECT

                        EIC/SY Management Report
MRUTL03      Utilization By Org & CCC As At 92/02/14

Command □
1Help  2      3Exit  4Refresh 5      6Right 7Bkwd 8Fwd  9Main 10Action

More..
12Cancel
    
```

Figure 7-9 Report by Org and Cost Centre

7.3.4 History Report

Choose a basic report selection, then tab to the History Selection date entry and TRANSMIT.

```

EIC/SY:MRUTL03      Utilization By Org & CCC 92/02/14      Ln: 18 of 329
File  View  Options  Help                               16:18:09 □

                        Resource Utilization
MRUTL03      Enter choice and press transmit key at date of report you want.
-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
Orga|
Code| [ ]  1. MRUTL01 - Summary By InfoGroup
-----|-----|-----|-----|-----|-----|-----|-----|-----|
0505|      2. MRUTL02 - Detail by Nominated InfoGroup...
0505|      3. MRUTL03 - Detail by Org & CCC
0505|
0505|      ----- Current Status As At -----
0505|      _ 920214
.EJECT      ----- History As At (Max 12 Month History Available) -----
MRUTL03      _ 9201 _ 9112

Command □
1      2      3Exit  4Refresh 5      6      7      8      9      10
Bottom
12Cancel
    
```

Figure 7-10 History Report Selection

Management Reports

InfoGroup Menu Activity

Enter selection 1 and the date range necessary from Section A (current status) or Section B (history).

A pop-up will be presented to allow InfoGroups to be selected for reporting.

```

EIC/SY:MROPR01          InfoGroup Menu Activity 92/03/06          Ln: 1 of 16
File  View  Options  Help                                     15:13:12

                                Report - Operation
-----
MROPR01  Enter choice and press transmit at Section A or B if applicable.
-----
MROPR01  Section A B
-----
                                Management Report - MROPR01
                                Enter / to select InfoGroup. FKS to next page if applicable.
                                Press transmit to produce report.
-----
InfoGroup
-----
2200     / 2200          - 2200-PM          - ACC-REC          - ACCOUNTING
          - ADMIN          - ASD              - ASERIES          - ASERIES-PM
          - ASIA           - AUSTRALIA       - BAD              - BARTEA
          - COMMS          - CONF            - CONNECT          - CTOS
          - CTOS-PM        - DATABASES       - DOC              - DOCUMENTPOOL
          - EDI            - EDUCATION       - F&A              - FINANCE
2200     - FLASH           - GOVT            - HELP             - HR
          - INDEK          - INDUCTION       - INFOCENTRE      - INFOIMAGE
          - INFORMIX       - LEGAL           - LIRC             - LOB-MRTG
          - M-SYNERCOM    - MAIN            - MAPPER           - MRTG
-----
Command  _____ More..
1        2        3Exit  4Rfrsh  5        6        7        8Fwd  9        10Cancel
  
```

Figure 7-12 InfoGroup Selection - Reporting

The system will report against the InfoGroup(s) selected.

The following example is for a single selection.

```

EIC/SY:MROPR01          InfoGroup Menu Activity 92/03/06          Ln: 1 of 16
File  View  Options  Help                                     15:13:12

                                EIC/SY Management Report
MROPR01  InfoGroup Menu Activity As At 92/03/06
-----
InfoGroup  Item          Menu  Month  Last  Last 12
           Description  ID    To Date  Month  Months
-----
2200      Conference Menu  220010  0      0      0
           Menu          220011  0      0      0
           220012      0      0      0
           22009       2      0      0
-----
2200      Total          2      0      0
-----
                                --- END OF REPORT ---
-----
Command  _____ Bottom
1Help  2        3Exit  4Rfrsh  5        6Right  7        8        9Main  10Action
  
```

Figure 7-13 Sample Menu Growth Report - Single Selection

InfoGroup Growth Rate

This report is based on historical growth rates. Enter the selection number then choose the required history period from Section B of the input menu.

A pop-up will be presented which allows specific InfoGroup(s) to be chosen to report against.

The system will display a report showing growth by InfoGroup.

InfoGroup Update Rate

Select item 3 from the menu selection.

A pop-up will be displayed, select the required InfoGroups and the date range.

```

MRC/SY:MROPR01          InfoGroup Menu Activity 92/03/06          In: 1 of 16
File  View  Options  Help                                     15:13:12
Management Report - MROPR03
-----
Enter Date, Section A & B selection. Press transmit to create report.
-----
MR: Update rate between [920101] to [920401] (YYMMDD)
-----
-- Section A ----- Select InfoGroup by / -----
/ 2200          2200-PM          ACC-REC          ACCOUNTING
In ADMIN          ASD          ASERIES          ASERIES-PM
-- ASIA          AUSTRALIA          BAD          BARINA
22 COMMS          CONF          CONNECT          CTOS
  CTOS-PM          DATABASES          DOC          DOCUMENTPOOL
  EDI          EDUCATION          F&A          FINANCE
  FLASH          GOVT          HELP          HR
--
2200 -- Section B ----- Select Item Type by /, blank input for all -----
  Conference Menu          Bulletin Board          Conference Item (Ope
  Document          Form          Graphics
-----
Command                                     More..
1  2  3Exit  4Refresh  5  6  7  8Fwd  9  10Cancel

```

Figure 7-14 Update Rate Selections

Section 8

User Education

This section tells you what the different kinds of people using EIC need to know in order to use EIC effectively.

8.1 Users

Users use EIC as a source of information. They need to know how to:

- Log on to EIC;
- Use the Menu Bar in EIC;
- Locate information in the menus keyword, text search;
- Use their private MyMenu and NotePad;
- Send Electronic Mail with EIC, as documents or data from a form, print;
- Get help on problems.

8.1.1 Logging on to EIC

Logging on to EIC involves several things which can be specific to each individual user.

They are:

- The type of machine that they use, for example, a dumb terminal or a workstation.
- The type of data communication link between the machine and the EIC host system. This could be via a local area network, a dial-up connection using a modem, or a permanent circuit which uses a leased line.
- Any terminal emulation software used by a workstation.
- Security access to the host computer, ie username and password. If a user needs help with anything mentioned above, help may need to be obtained from either a technical specialist at the user's site, or, in the case of security access, from your MAPPER coordinator.

8.1.2 Use of the Menu Bar within EIC

Initially, you should show a new user how to use the Menu Bar. The options are documented in the EIC User's Guide.

8.1.3 Locating Information

The instructions you can give a new user are:

To locate the information, start at the main menu and look at its contents. Select the most relevant item, and repeat the process while the item you selected is a sub-menu. You can use a keyword search to help you locate an item within a menu. If you should wish to search for information within a document, you can use a text search when the document is displayed on the screen.

8.1.4 Using "MyMenu" & the NotePad

The instructions you can give a new user are:

Your MyMenu contains information you access frequently. You can copy specific information from the main menu area to your MyMenu and vice versa. You can use your notepad to create documents or hold notes.

8.1.5 Printing Documents

Documents can be printed to the screen, a printer connected to your terminal/workstation, or a printer connected to the host computer.

8.1.6 Information Providers

Information providers generate information with EIC. They need to know everything a user knows about EIC, as well as how to:

- Enter information into EIC;
- Categorize information by using keywords;
- Restrict access by profiling information;
- Create summaries for documents where appropriate;
- Put new information into the appropriate menu.

8.1.7 Entering Information into EIC

You can either import documents and graphic images from the host computer or enter them from your terminal/workstation. You should know how to use the update facility to enter information into a document or into the notepad.

8.1.8 Categorize Information by Using Keywords

Before you categorize an item in a menu, you should check the keyword list for that menu. If possible, use existing keywords to classify your information. If this is not possible, you should create a keyword which has a clearly separate meaning from any previously defined keywords.

8.1.9 Restrict Access by Profiling Information

Profiling information is done so that the information is available only to people who have certain roles within the corporate structure. If there are no profile keywords available which can be used to define access to the document, then the system administrator should be contacted to arrange for changing the profiling system.

8.1.10 Create Summaries for Documents Where Appropriate

You should summarize information when you are able to give a brief overview of what the information is about.

8.1.11 Put Information into the Appropriate Menu

If you cannot find an appropriate menu to put new information in, it may be appropriate to create a new menu or modify an existing menu. When you do this, it should be clear to other people how the organisation of the information has changed. If necessary, you can create a summary as an item in part of the menu.

8.2 InfoGroup Owner

An InfoGroup owner is responsible for all of the information within a specific InfoGroup. The owner of the InfoGroup may have up to 36 assistant owners. The owner and assistants all have read and write access to all information within the InfoGroup. An InfoGroup owner (or assistant) needs to know everything that an information provider knows about EIC, as well as how to:

- Organise information within the menus;
- Respond to queries about information within the InfoGroup.

8.2.1 Menu Organisation

You should organise menu items so that the distinction between items in any menu is clear.

8.3 Systems Administrator

The system administrator is responsible for the efficient running of EIC . The system administrator may be solely responsible for EIC, or may work in conjunction with other system administrators. The administrators should know everything about the use, operation, structure, and maintenance of EIC. The central issues in being a system administrator are:

- Being aware of how people interact with EIC;
- Communicating with other system administrators about your current EIC information management issues;
- Talking to your MAPPER coordinator about system performance and resource issues;
- Giving training and advice to people on the use of EIC. This advice should centralize on the structuring of information and the answering or redirecting queries from users.

Section 9

Executive View Manager

9.1 Overview

The Enterprise Information Centre (EIC) View Manager is intended to allow business analysts to define end-user views of data, extracted from nominated financial and / or business systems within an enterprise. The required data is extracted or manipulated by small individual programs specific to the reporting requirement which may then be stored in a Management Report Library (MRL) associated with EIC. End-users are able to access this information by selecting prestructured views from an EIC menu, with each view able to be further manipulated by the end-user using EIC workstation functionality. Access control, security, administration and entitlement is managed by EIC.

9.1.1 User's View

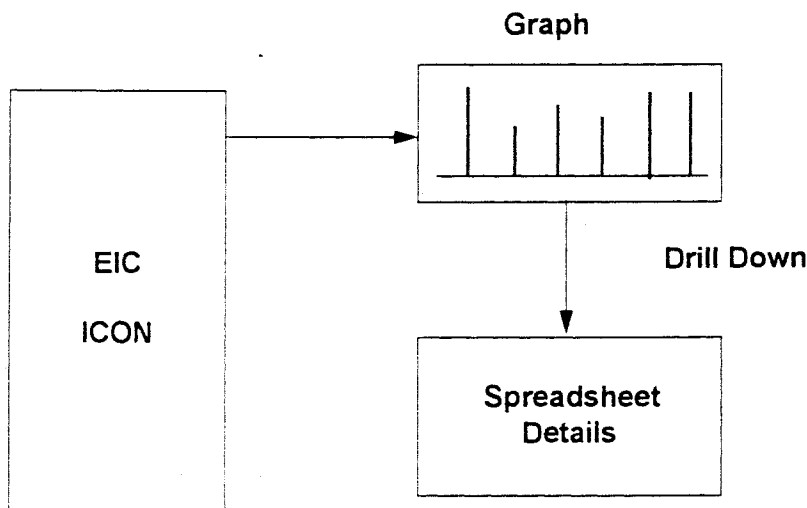


Figure 9-1 User's View - Simple Case

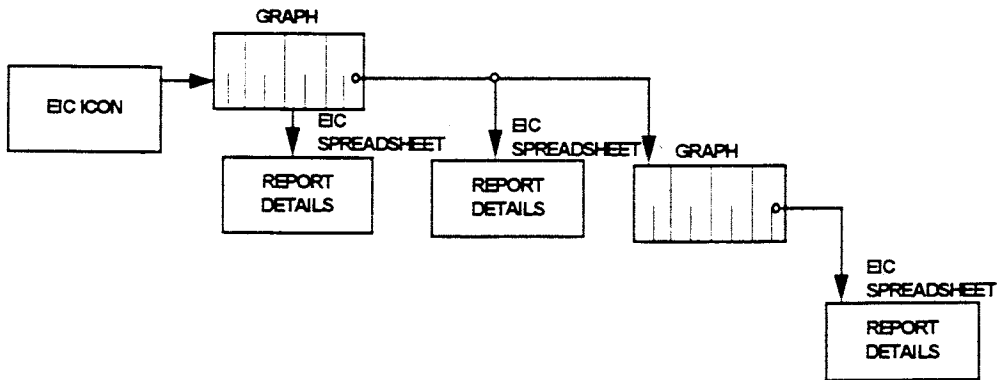
In this illustration of the simplest case, the user positions the mouse pointer then 'clicks' on the required Icon on the EIC menu of available views. The system then downloads all of the available views attached to that root Icon to the user's workstation and displays the first view, which in this case is a graphical chart. Using the workstation functionality, the user can then drill-down further to the underlying spreadsheet.

The EIC workstation functionality allows the user to change the graphical presentation or the underlying spreadsheet for redisplay. The result can be exported to an external spreadsheet package, stored as a DOS file, comma-separated file, printed, etc.

9.1.2 Chained Views

The EIC workstation software allows graphical presentations to have active areas. If the user positions the mouse pointer and 'clicks' on an active graph area, an information box is displayed which shows the numeric value of that section of the graph. If another view is 'chained' off the selected portion, the information box displays a 'Chained View' Icon. On 'clicking' on this Icon, the next lower view is presented. The process may be repeated for as far down in the chain as there are graph charts, until the final view is presented. The final view is always a spreadsheet report of data selected from the Management Report Library.

USER'S VIEW - DRILL DOWN



◦ REPORT DETAILS ARE DISPLAYED AS SPREADSHEETS ON EIC WORKSTATION

Figure 9-2 User's View - Drill Down

9.1.3 Constructing Views

Figure 9-3 shows the relationship between the major components that make up the Executive View Manager capability of EIC. Data is brought into the system dynamically or into a local repository from which selected row and column information is brought together to form discrete end-user defined views. A business analyst defines each view using the Administrative capability of the View Manager. The Database access manager is used to define the source of the data for a particular view - views may be constructed from periodic data (MRL) or by realtime access to a remote database or application.

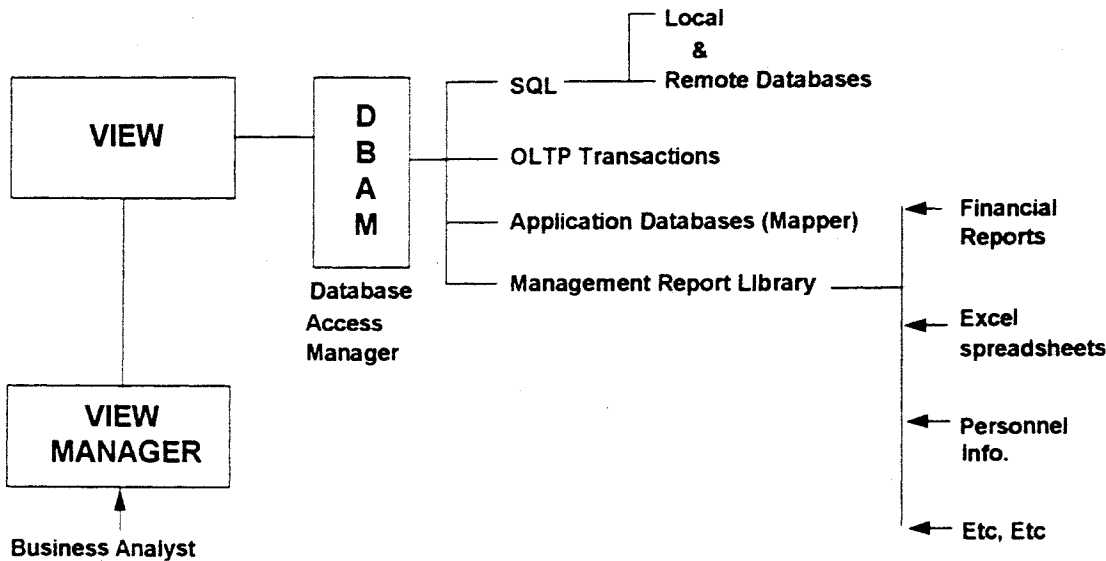


Figure 9-3 Overview - Constructing Views

9.1.4 Support Domains

Figure 9-4 shows an overview of the general areas of organisational responsibility so far as system establishment, maintenance or support is concerned. Development and maintenance of views is seen as the responsibility of the business analyst function and clearly rests in the end-user domain. Maintenance of the Management Report library table structure, data sources or application access is the responsibility of the IT organisation (database support function).

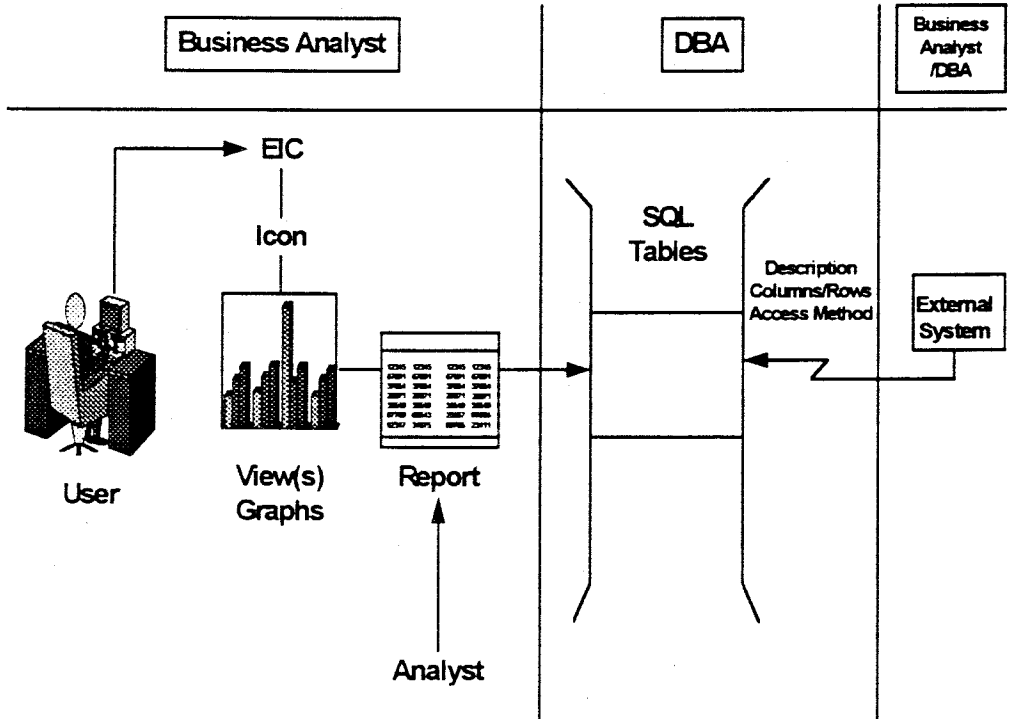


Figure 9-4 Support Domains

9.1.5 User Registration

User registration and access control to the EIS capabilities constructed with the EIC Executive View manager functionality, is managed within the normal EIC User registration capability.

9.1.6 View Manager - Administration

Note: Terminology used in this description of the View Manager is based on SQL standards and at times may be at variance to Unisys proprietary MAPPER terms.

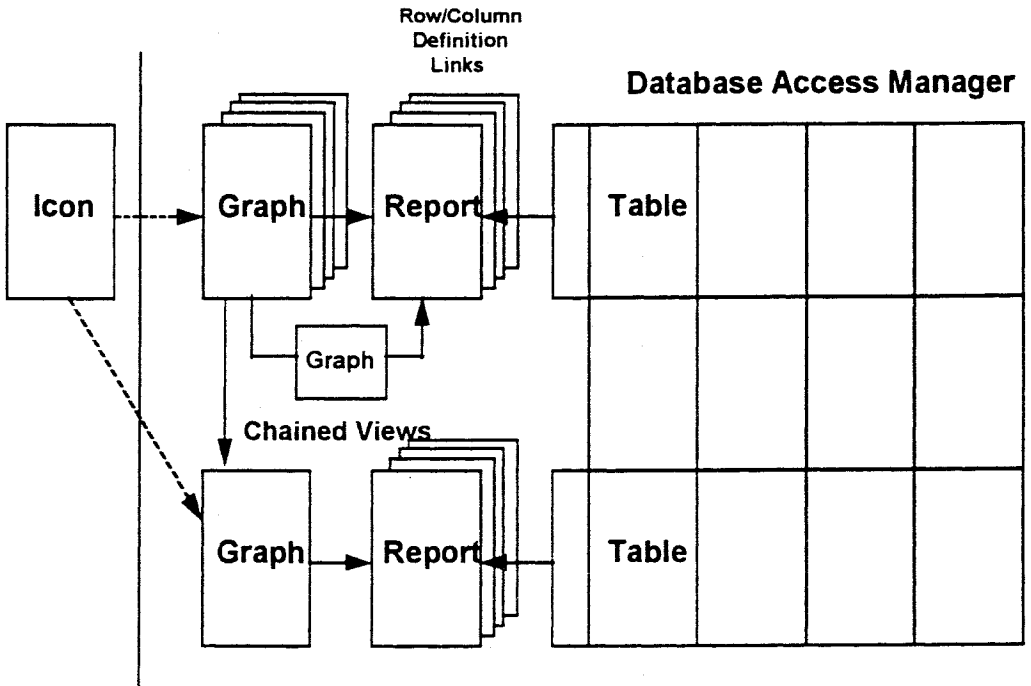


Figure 9-5 View Administration Flow

The View Manager administration capability is broadly structured as shown in the preceding diagram and the three major elements which have to be defined are:

- Tables which define the data elements which will be selected from the Database Access Manager.
- Reports which present the selected data elements in tabular format.
- Graphs which allow the report to be shown in chart form.

9.1.7 View Chaining

Views may be chained together in a hierarchical manner so that the required 'drill-down' capability may be implemented. The underlying reports may be displayed and manipulated at each level of the 'drill-down'. This is illustrated in Figure 9-6.

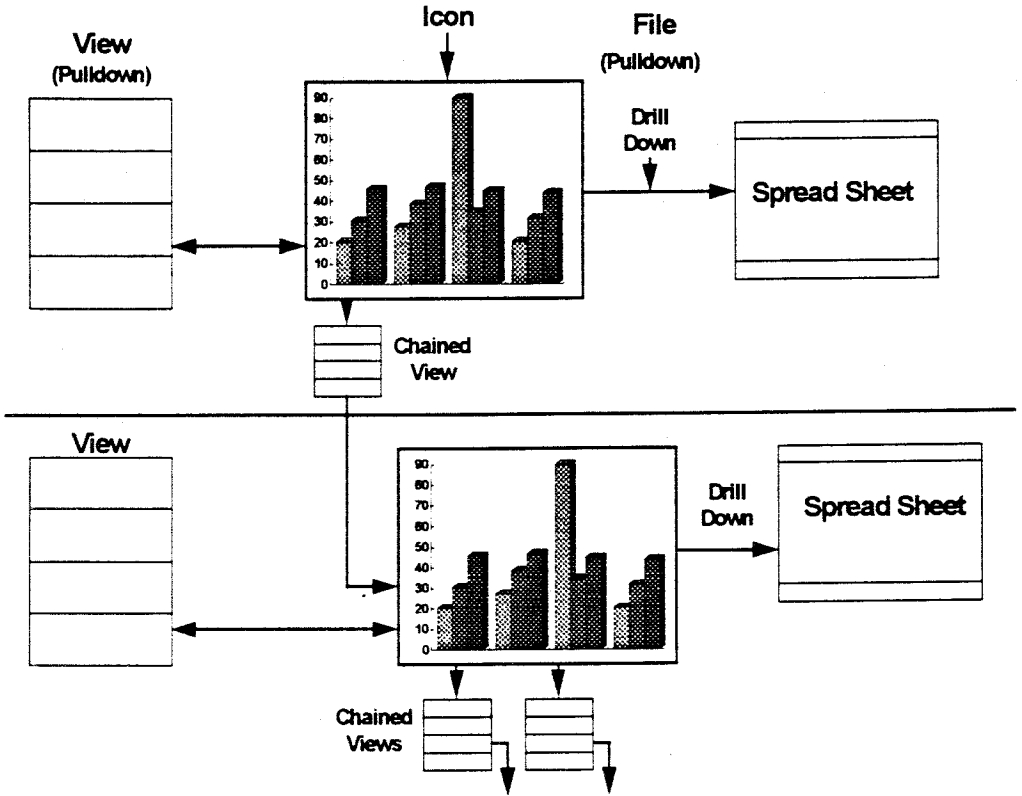


Figure 9-6 Drill-Down

It must be remembered that the mechanism is completely flexible and that the structures described in the following sections are examples of possible approaches. The functionality utilises Windows 'point and click' functionality. The presence of prompt lists or additional fields is indicated by buttons or scrollbars - do not hesitate to investigate these.

9.1.8 Working with EIC View Manager

In building Tables, Reports and Graphs, each window is displayed on the workstation screen (see Figure 9-7). This means that it is possible to move back and forth between each functional step by 'clicking' on the top of the required window. It is also possible to display the resultant graph, cancel then return to the Graph admin function. This means that the output can be progressively checked as the Graph is built.

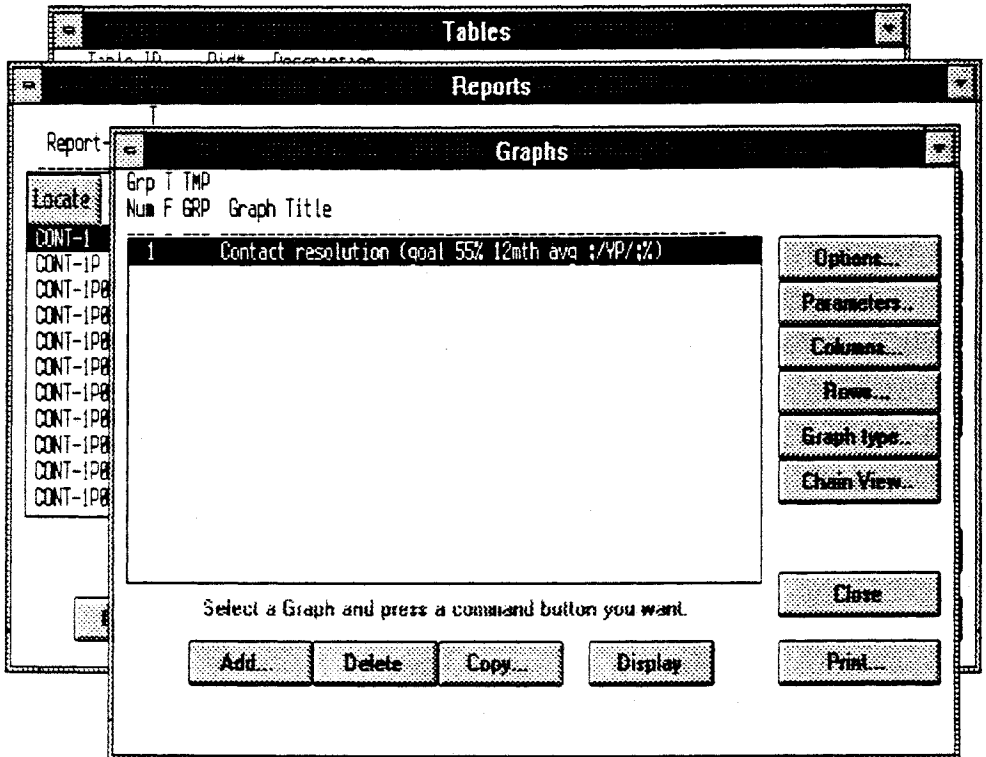


Figure 9-7 Working in the Functional Windows

9.2 Tables

9.2.1 View Manager Index Table Relationships

Table relationships are shown in Figure 9-8.

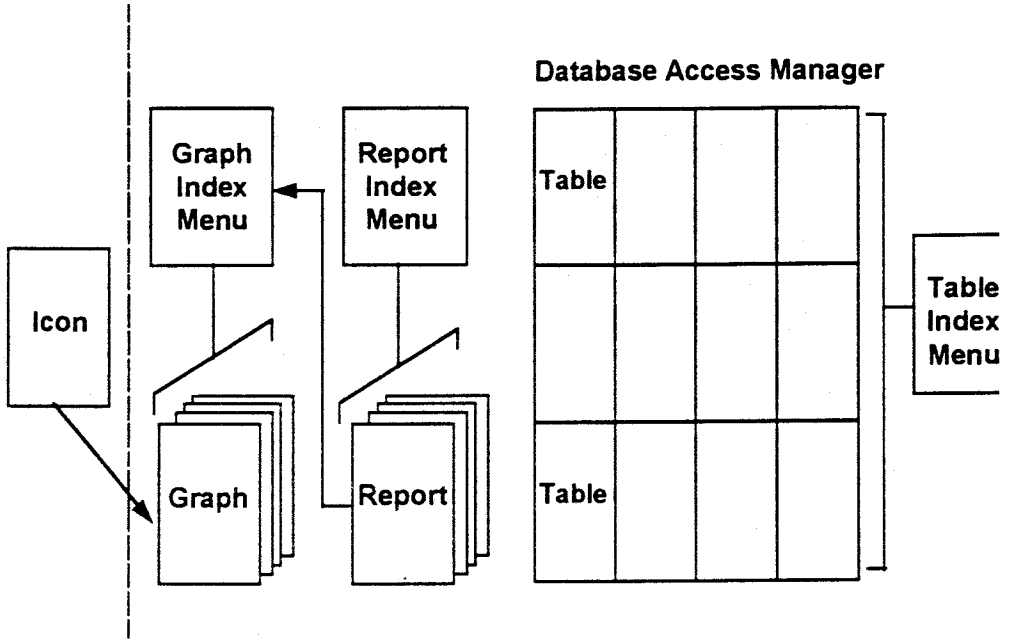


Figure 9-8 Table Relationships

9.2.2 The Database Access Manager Table Index

The View Manager Administration capability is accessed from the EIC Admin pull-down. The initial menu is an indexed list of available tables within the Data Access Manager.

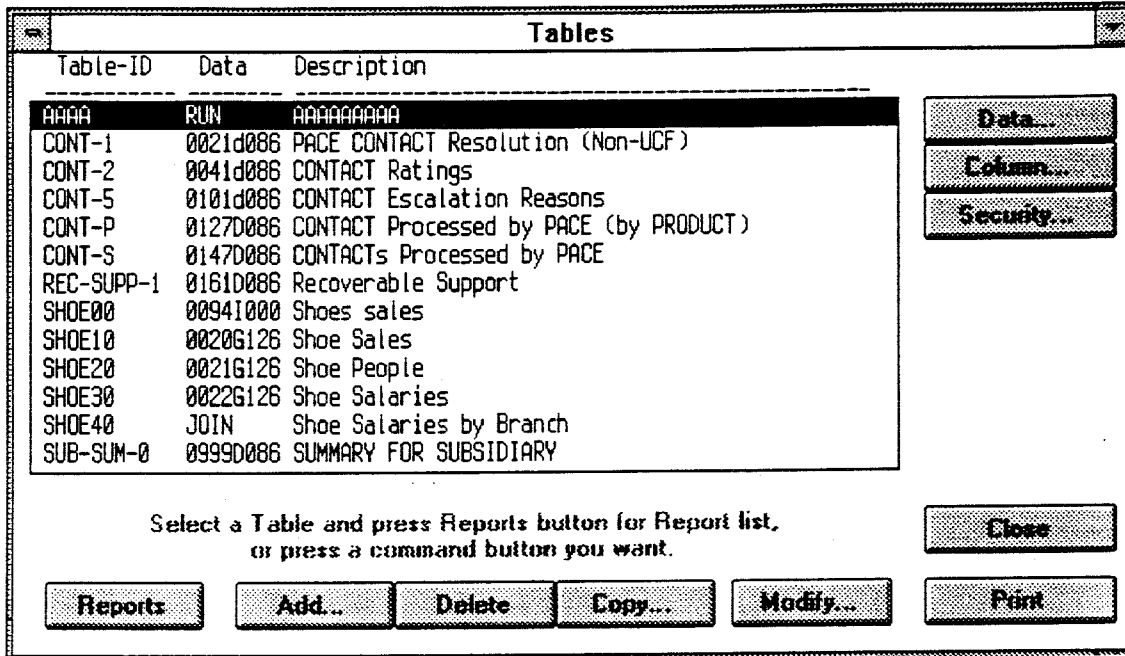


Figure 9-9 Data Access Manager Table Index

As indicated by the function buttons at the bottom of the menu screen, tables may be managed by selecting the appropriate function. The required table may be selected by clicking once on the table entry before selecting the function to be performed.

The reports attached to a table may be selected by double-clicking on the required table entry, or by selecting the required table entry then selecting the reports function.

Table-Id	User assigned table name.
RID ##	MAPPER Report (RID) number in the Management Report
Description	Library which will be referenced by this table. User-assigned description for this table.

Function buttons

Reports	Display reports list assigned to selected table.
ADD	Add a new table.
Delete	Delete the selected table.
COPY	Copy the selected table.
Modify	Modify the selected table.

9.2.3 Adding or Modifying a Table

When the Add or Modify functions are selected the following definition screen will be displayed. Figure 9-10 shows example data for an existing definition.

Figure 9-10 Table Definition

Item descriptions:

- Table Id User assigned table name.
- Default Report-Id User assigned View Id. (Used for identification in a View list)
- Description Summary description of table.
- Cab/Drw/Rid# MAPPER Cabinet / Drawer / Rid in which the table resides.
- InfoGroup Id InfoGroup in which this table is to be registered.
- Data Source Data Included : MAPPER Run ;
Join table : SQL Relational Database.
Identifies the source of data to be included in the table.

9.2.4 Accessing Data Table

Select the DATA function. the following MAPPER run call menu will be displayed. Enter the MAPPER run call statement, then OK.

Figure 9-10.1 Data table run call

9.2.5 Column Data format

Select the COLUMN function button, the following function menu will be displayed. This is intended to allow column data default formats to be specified. To specify a format for a particular column, first select the column from the list then select the format button. The selection will be noted against the Column descriptor in the table.

Column Name	Val Format
Locate	Line: 1
SU	Numeric
YMM	Left justified
Month	YMMDD
P/P/S	Right justified
ORG	
GROUP	
<-- #	
---AVG RES	

Select column(s) and press appropriate button.
Default format is Left Justified text.

Figure 9-10.2 Column Data format selection

9.2.6 Date and Time format

Column data can be displayed in preset Date and Time format by first selecting the target Column from the list box then selecting the DATE & TIME function. Select the default format from the following table.

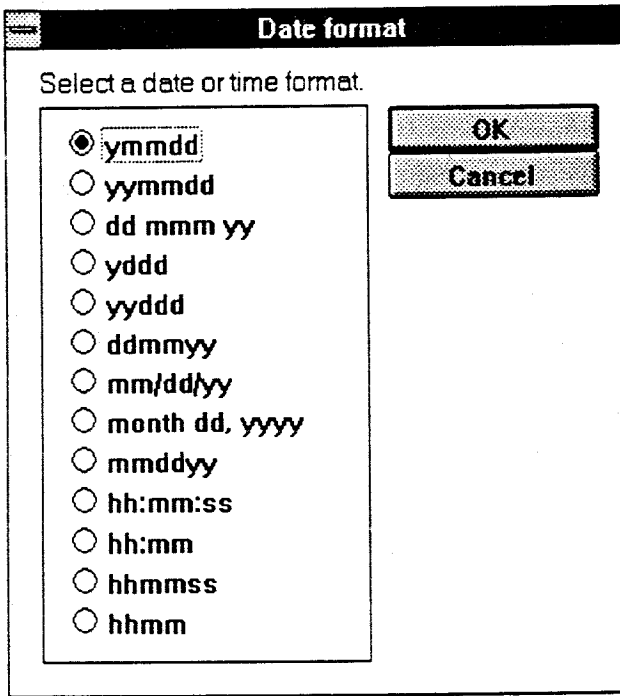


Figure 9-10.3 Date and Time format

9.2.7 Column Security

Column security is based on the standard EIC security approach where access rights are dependent on the User's role definitions. Column security can be implemented by first selecting the target Column from the list box then selecting the SECURITY function. The following security definition table will be displayed - enter the role definitions that are able to access this column. Follow the instructions accompanying the table. To assist in selecting the correct profiles, a Profile List function is provided at the bottom of each column in the table.

Access security Profile

Enter profiles to be matched against user profile.
 [** Note: Vertical is OR, Horizontal is AND condition]

Save

Cancel

Go back

Profile list 1

Profile list 2

Profile list 3

Profile list 4

Figure 9-10.4 Column Security definition table

9.3 Reports

A Report is the underlying spreadsheet that is displayed when Drill Down is selected on the FILE pull-down menu. The following process describes how to select the data required to construct this spreadsheet (Report).

9.3.1 Maintaining Reports

When a table entry is selected, the system displays the list of Reports (views) associated with that table. Note that as there may be an extensive number of reports, scroll bar and locate facilities have been provided in order to help locate the required report.

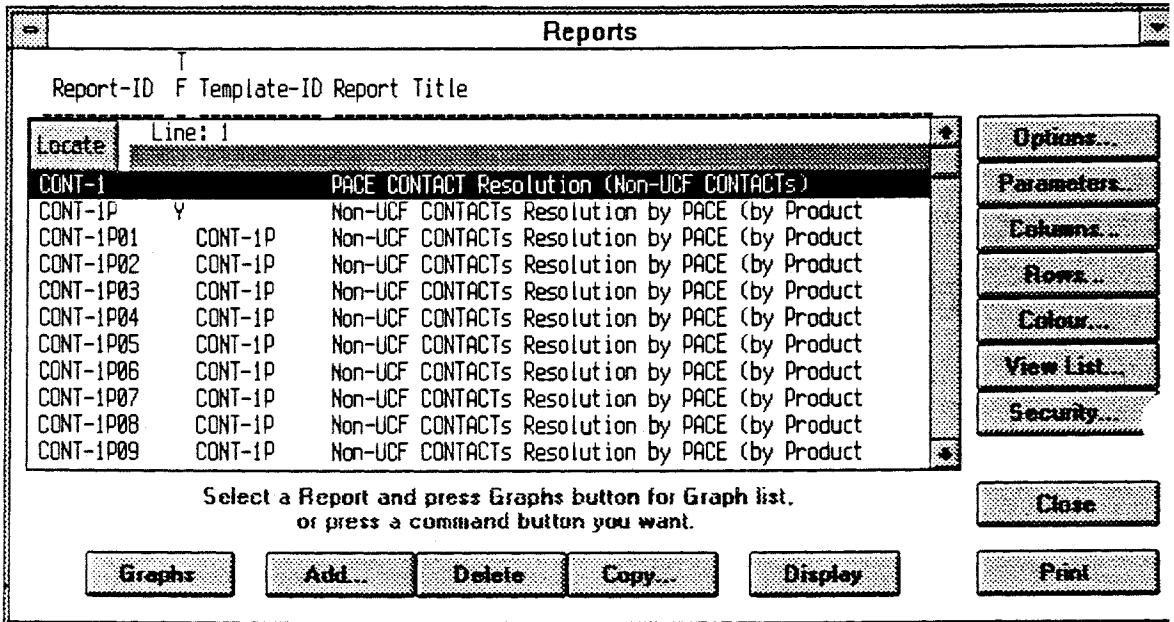


Figure 9-11 Report Index Menu

Item descriptions:

- Report Id
- Template Id
- Description
- Locate Locate required report in index.
- Graphs Access graph index attached to selected report.
- Add / Delete / Copy Report maintenance functions.
- Display Display the selected report.
- Close Exit the report maintenance facility.
- Print Print the screen on display.

Item descriptions:**Operation function buttons (right hand side)**

Options	Report definition options.
Parameters	Report input parameter definition.
Columns	Column selection definition.
Rows	Row selection definition.
Colour	Colour definition
View list	Defines the views which will be attached to this report.
Security	Define table security . (See Figure 9-10.3 for definition)

9.3.2 Adding / Modifying a Report

Add - Select the ADD function.

Modify - Select the OPTIONS function.

On selecting the required function, a report definition menu is displayed as shown in Figure 9-12. Provide the required details then select the OK function - this screen can be cancelled by selecting Cancel. Template reports can be selected by accessing the Template Report List function.

Template Report

If this is to be a report template, enter Y (yes) in the Template Report/Graph Definition field.

Standard Report

If this is to be a standard report, simply enter the report title then select OK.

The screenshot shows a window titled "Report Definition". It contains the following elements:

- Report-Id**: A text input field.
- Option**: A checkbox labeled "Template Report definition".
- Title**: A text input field.
- InfoGroup-Id**: A text input field with a dropdown arrow icon to its right.
- Template Report**: A text input field with a dropdown arrow icon to its right.
- Buttons**: Two buttons labeled "OK" and "Cancel" are positioned to the right of the "InfoGroup-Id" field.

Figure 9-12 Report Definition Entry Menu

Item Descriptions:

- Report Id**: User defined report number.
- Template Report Id**: ID of the template report to be copied (or use Template report list- access by clicking on selector).
- Template Report/Gr**: If Y (yes) indicates this is to be a template.
- Title**: User defined report title.
- InfoGroup Id**: Nominate the IngoGroup to which this report belongs. This is an access security requirement.

Item Descriptions:

Parameter name	User-assigned parameter name.
Parameter type	Type of parameter.
- Column-first	Parameter value equals Column name (first line).
- Column-last	Parameter value equals Column name (last line).
- Value	User defined constant value.
- Input	Takes the parameter value from another report - this is used for Template reports only!
Constant value if type is value .	Constant to be used if a Value type is selected
Column name to extract value if type is Column	Name of the column from which Value is to be selected if type is Value.
Partial field	Column Number, number of characters.
Description	Description of the Parameter.

9.3.5 Defining Row Selections

The row definition table is accessed by selecting the Column operation button. A table as shown in Figure 9-15 will be displayed. Note that prompt lists of parameter selections are provided for selected columns in the table, these are selected by clicking on the associated button indicators or the entry field itself.

File Help		Column Name	Partial Field	Operator	Value 1
1	P/P/S	[-]	Equal	sub	
2	ORG	[-]	Equal	total	
3	GROUP	[-]	Equal	total	
4					
5					
6					
7					
8					
9					
10					
11					

Figure 9-15 Defining Row Selections

File Help		Column Name	Partial Field	Value 1	Value 2
1	P/P/S	[-]	sub		
2	ORG	[-]	total		
3	GROUP	[-]	total		
4					
5					
6					
7					
8					
9					
10					
11					

Figure 9-16 Defining Row Selections - Showing Value 2 Field

9.3.6 Defining Colour Selections

The colour definition table is accessed by selecting the Colour operation button. A table as shown in Figure 9-17 will be displayed. Note that prompt lists of parameter selections are provided for selected columns in the table, these are selected by clicking on the associated button indicators or the entry field itself.

The functionality allows individual and groups of items to be specially coloured. Also bands of colours to be established to allow row types to be grouped or simply to make it easier to differentiate between rows.

File		Help						
	FROM Row No.	TO Row No.	Increment	Colour SET 1 Fore Ground	Colour SET 1 Back Ground	Colour SET 2 Fore Ground	Colour SET 2 Back Ground	
1	1	1		Black	Yellow Dark			
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								

Figure 9-17 Colour Definition Table

File		Help						
	FROM Row No.	TO Row No.	Increment	Colour SET 2 Back Ground	Column Name	Key?	Y/N	
1	1	1						
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								

Figure 9-18 Colour Definition Table - Showing Column Name & Key Fields

Item Descriptions:

- From row no. start of range
- To row no end of range

Item Descriptions

Column name	select name from the column selection entry.
Partial field the	where a partial column is to be selected, this defines starting character position of the selection, within the field / number of characters.
Operator include,	logical operators which compare the contents of the selected row with the value in Value 1 field and / Value 2 field. Operators are : LT, LE, EQ, NE, GT, GE, IN = EX = exclude, TP = top, BT = bottom.
Value 1	target value for row selection
Value 2 OR'	used in association with Value 1 contents as a 'logical function.

9.4 Building Graphs

9.4.1 Graph Index Table

The Graphs attached to a report may be accessed by 'double-clicking' on the target report or 'single click' then 'clicking' on the Graphs maintenance button at the bottom of the Report window. Figure 9-21 shows an example graph table index.

This index window has maintenance buttons at the bottom and operator buttons on the right-hand side. The maintenance buttons are used to add, delete or modify graph tables and to display the results of the selections so far built in a current table. The operator button (Options, Parameters, etc) are laid out in the logical order of progression.

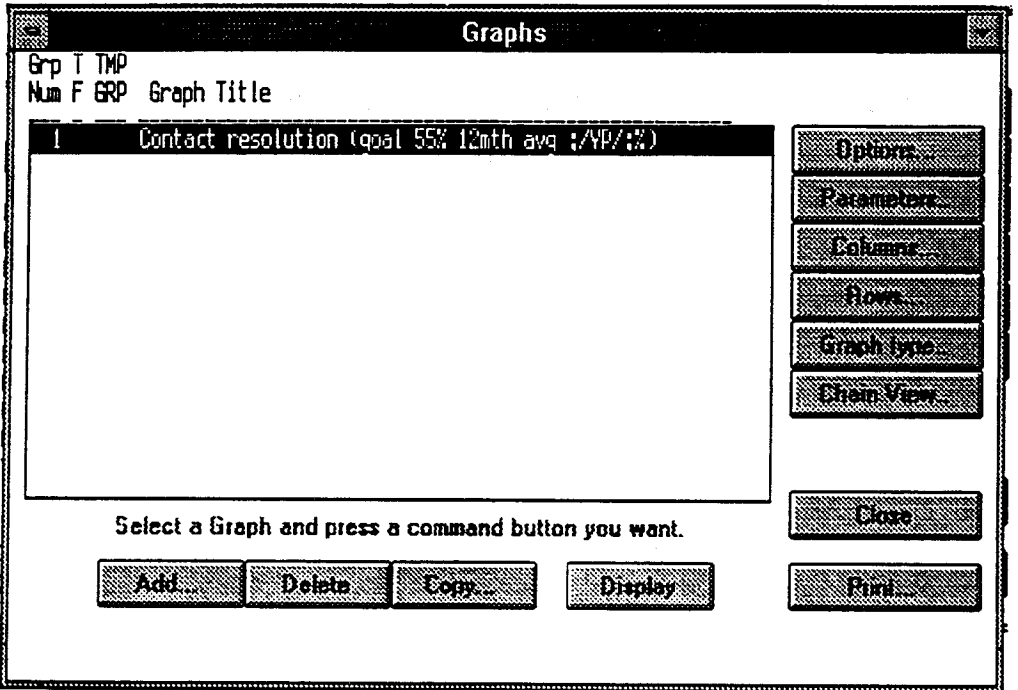


Figure 9-21 Graph Table Index

9.4.2 Changing Graph Title and Options

The graph title and options may be changed by selecting the Options operator button. The entry table is displayed as shown in Figure 9-22. Note that in this instance no Template Graphs have been developed. If available, these are displayed in the Template Graph area as a selection menu.

Provide the required details then select the OK function - this screen can be cancelled by selecting Cancel.

Template Graph

If this is to be a graph template, enter Y (yes) in the Template Graph Definition field.

Standard Graph

If this is to be a standard graph, simply enter the report title then select OK.

Figure 9-22. Graph Options

Item Descriptions:

Graph Number	User defined report number.
Template Graph Definition?	If Y (yes) indicates this is to be a template.
Title	User defined report title.
Template Graph	Menu of graph templates.

9.4.4 Defining Graph Column Selections

The Graph column definition table is accessed by selecting the Column operation button. A table as shown in Figure 9-24 will be displayed. Note that prompt lists of parameter selections are provided for selected columns in the table, these are selected by clicking on the associated button indicators or the entry field itself.

File Help		Column Name	Length	Display Order	Sort Level	Sort Option	Partial Sort Position
1		YRMM	004				(-)
2		Month	005				(-)
3		FY/FS	003				(-)
4		ORG	006				(-)
5		GROUP	007				(-)
6		Total Response	007				(-)
7		Total Escalate	009				(-)
8		Total Return	007				(-)
9		Total	007				(-)
10		Non UCF response	007	1			(-)
11		Non UCF Escalate	009	2			(-)
12		Non UCF Return	007				(-)
13		Non UCF Total	007				(-)
14		UCF Escalate	009				(-)
15		UCF Return	007				(-)
16		12MTD Total Response	007				(-)
17		12MTD Total Escalate	009				(-)
18		12MTD Total Return	007				(-)
19		12MTD Total	007				(-)
20		12MTD Non UCF Response	007				(-)
21		12MTD Non UCF Escalate	009				(-)
22		12MTD Non UCF Return	007				(-)
23		12MTD Non UCF Total	007				(-)
24		12MTD UCF Escalate	009				(-)

Figure 9-24 Graph Column Selections

Item Descriptions:

Column name the	the name for the particular column that will appear in the user's view.
Length	length of the column field
Display order displayed	indicates the order in which the column will be in the user view.
Sort level	Indicates the order in which the columns will be sorted, (default is the order in which they are entered).
Sort option ascending.	N = numeric, D = descending default is alpha / ascending.
Partial sort position	Where a column field is to be selected, this defines the starting character position within the field then the number of characters.

Hide Y/N?

Indicates whether the column is to be displayed in this view (may be made visible for other views).

9.4.5 Graph Row Selections

The Graph row definition table is accessed by selecting the Column operation button. A table as shown in Figure 9-25 will be displayed. Note that prompt lists of parameter selections are provided for selected columns in the table, these are selected by clicking on the associated button indicators or the entry field itself.

File		Help		Column Name	Length	Display Order	Sort Level	Sort Option	Partial Sort
1		Y/M	004						(-)
2		Month	005						(-)
3		P/P/A	005						(-)
4		GRG	005						(-)
5		GROUP	007						(-)
6		Total Respond	007						(-)
7		Total Escalate	008						(-)
8		Total Return	007						(-)
9		Total	007						(-)
10		Non UCF respond	007	1					(-)
11		Non UCF Escalate	008	2					(-)
12		Non UCF Return	007						(-)
13		Non UCF Total	007						(-)
14		UCF Escalate	008						(-)
15		UCF Return	007						(-)
16		12MTD Total Respond	007						(-)
17		12MTD Total Escalate	008						(-)
18		12MTD Total Return	007						(-)
19		12MTD Total	007						(-)
20		12MTD Non UCF Respond	007						(-)
21		12MTD Non UCF Escalate	008						(-)
22		12MTD Non UCF Return	007						(-)
23		12MTD Non UCF Total	007						(-)
24		12MTD UCF Escalate	008						(-)

Figure 9-25 Graph Row Selections

Item Descriptions

Column name the	the name for the particular column that will appear in user's view.
Length	length of the column field
Display order displayed	indicates the order in which the column will be in the user view.
Sort level	indicates the order in which the columns will be sorted, (default is the order in which they are entered).
Sort option ascending.	N = numeric, D = descending default is alpha /
Partial sort position	Where a column field is to be selected, this defines the starting character position within the field then the number of characters.
Hide Y/N?	Indicates whether the column is to be displayed in this view (may be made visible for other views).

9.4.6 Selecting the Graph Type

The Graph type selection table is accessed by selecting the Graph Type operator button.

The selection table is displayed as shown in Figure 9-26- note that the current graph type selection and row label are displayed at the top of the table..

The screenshot shows a dialog box titled "Graph Type and Text". It has several input fields and options:

- Graph type:** A scrollable list box containing "Bar (3D) Stacked".
- Row label:** A scrollable list box containing "Month".
- Options:** A group box containing two checkboxes: "Auto Scaling" (unchecked) and "Transpose Row and Column" (unchecked).
- Window Caption:** A text field containing "P A C E Management Reporting".
- Main Title:** A text field containing "Non-UCF Contact Resolution".
- Y-Axis:** A text field containing "#".
- Row Title:** A text field containing "[Goal: ;/gp/:% ;/mmm/: ;/yy/: ;/p/:% 12MTD: ;/yp/:%]".
- Column Title:** A text field containing "Month".

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Figure 9-26 Graph Type Selection Table

Item Descriptions:

- Graph type** Selection scrollbar allows required type to be selected.
- Row label** Selection scrollbar allows Row Label to be selected.
- Options** Allows rows and columns to be transposed on the output.
- Titles** Allows the various sections of the graph to be annotated.

