Introduction to Elliott® V8.0

Overview

Version 8.0 brings major improvements in user experience and database security to Elliott. At the same time, however, it remains database-compatible and feature-compatible with Elliott V7.5. In fact, an organization can run both V7.5 and V8.0 at the same time. Individual users can switch back and forth between versions for different tasks, or even run both versions on their desktops at the same time. Because of this database-compatibility and feature-compatibility, upgrading to Elliott V8.0 is a low-risk opportunity.

New Features

There are many new features and enhancements in this release:

- **Navigation:** A new Microsoft Office®-like Control Center replaces the V7.5 menu system.
- **Three User Interface Options:** For PC, tablet and mobile devices.
- **Tasks and Fonts:** Each task is launched in a separate window, referred to here as a Legacy Screen, with more intuitive control of fonts.
- **Security:** A revamped directory structure enhances database security and simplifies updates.
- **Help:** Web-based Help ensures the latest documentation is always available.
- **Reporting:** Reporting improvements include multiple, simultaneous destinations; Deferred Processing improvements; and a new, more powerful Report Viewer.
- **Spooled Reports Manager:** A new Office-like Spooled Reports Manager program improves the access and management of spooled reports.
- **Spooled Reports Structure:** A new Spooled Reports architecture removes previous limitations, eliminates need for archiving, enhances security of reports and greatly reduces disk space requirements.
- **Drill Down:** Drill-down limitations are removed and capabilities improved.
- **eContacts Processor:** A more intuitive eContacts Processor (Mass Email) includes the ability to send HTML content.
- **SMTP Email:** Industry-standard SMTP improves Email capabilities.
- **Continuous Notes:** Elliott notes that are not Tickers and do not have labels are treated as continuous notes, with word-wrap, traditional cut/copy and paste, and the ability to see the entire content of the note on a single screen.

Requirements

Pervasive® PSQL Database

Elliott V8.0 will require the Pervasive® PSQL 11 or PSQL 12 database engine to run. You may obtain a copy of PSQL 11 or 12 from your Elliott reseller, if you do not already own a copy. For the best performance, we recommend the 64-bit version of PSQL 12. The 64-bit PSQL 11 and 12 database engines require a 64-bit server (e.g., Windows 2008

R2 or Windows 2012). Since Elliott itself is a 32-bit application, we will continue to support 32-bit operating systems like Windows XP through Windows 8.

Client Operation Systems Support

Elliott V8.0 will run on the following client operating systems:
> Windows XP (all versions)
> Windows Vista (all versions)
> Windows 7 (all versions)
> Windows 8 (all versions except Windows RT)
> Windows 10

Server Operating Systems Support

Elliott V8.0 will run on the following server operating systems:
> Windows 2003 Server (32- or 64-bit)
> Windows 2008 Server (32- or 64-bit)
> Windows 2012 Server (64-bit)

Microsoft® .NET Framework V3.5

This version of Elliott requires Microsoft.NET Framework V3.5. If it is not already installed on your computer, you may download it from www.microsoft.com . All new PCs come with Microsoft.NET Framework V4.5 or 4.6 preinstalled. However, .Net 4.5 or 4.6 is not 100% backward compatible with .Net 3.5. Therefore, if your PC does not have .Net 3.5 installed, we suggest you manually download .Net 3.5 from the Microsoft website.

Platform Requirement Cross Check

To assist you in determining if Elliott 8.0 will work in your environment, we are listing the requirements of .Net & PSQL by operating system as follows:

Operating System	.NET Framework 3.5	PSQL Version Supported
Windows XP	Not included on OS, but installable	PSQL 11
Windows Vista	Not included on OS, but installable	PSQL 11 & 12
Windows 7	Included on OS	PSQL 11 & 12
Windows 8	Included on OS, but require enabling	PSQL 11 & 12
Windows 8.1	Included on OS, but require enabling	PSQL 11 & 12
Windows 10	Included on OS	PSQL 11 & 12
Windows 2003	Not included on OS, but installable	PSQL 11
Windows 2008 SP2	Not included on OS, but installable	PSQL 11 & 12
Windows 2008 R2 SP1	Included on OS	PSQL 11 & 12
Windows 2012	Not included on OS, but	PSQL 11 & 12

	installable	
Windows 2012 R2	Not included on OS, but installable	PSQL 11 & 12

Setup and Configuration

Planning Elliott 8.0 Installation

Typically, Elliott is installed on a central server shared folder where all users map a remote drive to that shared folder. If you previously used Elliott 7.x, then chances are you already have a mapped drive and folder like the following:

     M:\Elliott7

You may not be using the same drive letter M: or same \Elliott7 directory. But all your users in the local area network need to map the same drive letter and path in order to use Elliott. The same principle stays true for Elliott 8.0.

In Elliott 7.x, some programs are stored in the Elliott root directory (e.g., M:\Elliott7), and some programs are stored in Elliott Programs subdirectory (e.g., M:\Elliott7\Programs). On the other hand, in Elliott 8.0 all executables, DLLs, and program libraries are stored in a central subfolder of the Elliott directory. By default, this subfolder is the "Bin" folder (e.g., M:\Elliott7\Bin). This eliminates the need to give users read and execute rights to the Elliott root directory, and makes securing Elliott directories a lot easier to manage. With Elliott 8.0, only the "Traverse and List Folder" rights are needed for the Elliott root directory.

If you are already running Elliott 7.x and want to upgrade to Elliott 8.0, then you may use the ELLIOTT8.EXE installation package, which will create the BIN subdirectory in your existing Elliott root directory and copy all the program files to that directory.

If you are installing Elliott 8.x from scratch, then you may use the ELLIOTT8.EXE installation package for the installation. By default, "C:\Elliott8" will be used for installing, but you may install to any network drive and path. The whole Elliott folder and subfolders like "Bin" and others will be created.

Set Up Elliott Desktop Shortcut

Elliott installation utilities are intended for setting up or updating the shared folder on a remote network drive only. There is no separate Elliott client installation utility to install on each workstation. In order to run Elliott 8.0 from the workstation, you will need to go to each workstation and make sure you have the remote drive mapped and can access the Elliott 8.0 folder like M:\Elliott7 or M:\Elliott8.

Throughout this document, when we mention <root>, it means the root directory for your Elliott installation. This can be, for example, "M:\Elliott7" or "F:\Elliott8." Whenever, we mention the <root>, replace it with the actual drive letter and path where your Elliott is installed.

To allow a workstation to run Elliott 8.0, go to the <root>\Bin directory and run CreateElliott8Shortcuts.exe.
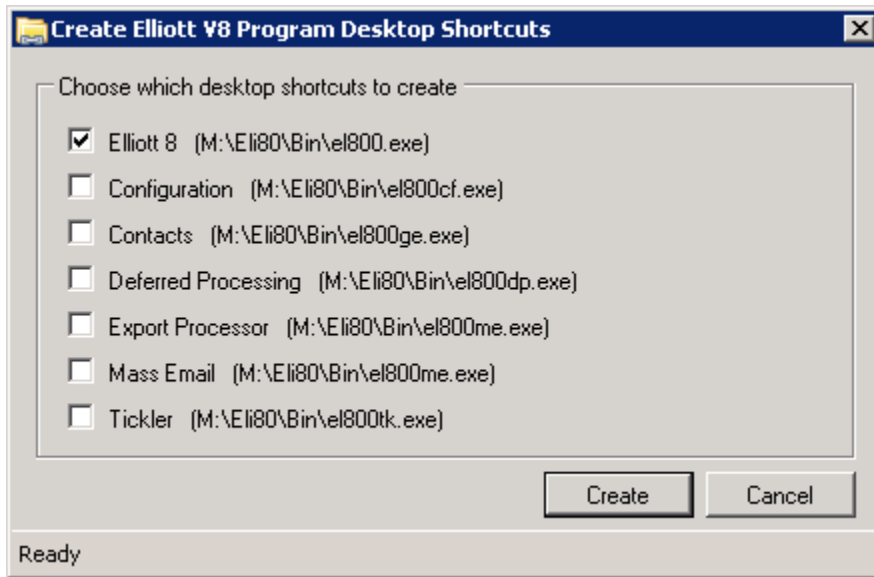
This program will allow you to choose which desktop icons you would like to create. There are several options available. The program will pre-select the Elliott 8 shortcut. At your discretion, there are several other EXEs in the same <root>\Bin folder you can set up on user's workstation as well:

EL800CF.EXE	Elliott V8 Configuration Utility
EL800DP.EXE	Elliott V8 Defer Processing
EL800GE.EXE	Elliott V8 eContacts
EL800ME.EXE	Elliott V8 Mass Email
EL800ME.EXE –E	Elliott V8 Export Processor
EL800TK.EXE	Elliott V8 Tickler

If a workstation has never run Elliott before, then chances are you will need to install Pervasive PSQL Client V11 or V12.

Configuring Elliott V8.0

After installing Elliott V8.0, you need to make some configuration changes. If this is **the first time** you have **started Elliott**, the system will detect that the EL800.CFG file does not exist in your startup <root>\Bin directory (e.g., M:\Elliott7\Bin). Therefore, the ElliottV8.0 System Configuration utility will start up automatically. You can also use EL800CF.EXE in the Bin folder (<root>\Bin) to set up Elliott Configuration first.

The following form will be displayed:

Descriptions of the configuration entries follow:

Default Printer Port

This is to specify the default LPT port for the "Raw Data Pass Through" feature. You should leave it at "LPT1" unless you have a special reason to change it.

Country

The Canadian version is different from the US version. Make sure you are using the right version for your country.

Options

- **Use Elliott Deferred Processing:** Check this box to indicate that you intend to run Elliott Deferred Processor on the server console, and preferably on a 24x7 basis to serve as a report engine. If this box is not checked, you will not be able to

use Deferred Processing or the new Run Now reporting feature in the printing option window.

- **Share Configuration Info with NETcellent (recommended):** Checking this box allows Elliott to occasionally send configuration (setup) information to NETcellent. Because NETcellent wants to focus on improving features that our users actually use, this will help us with development of future improvements.

Email Settings

These email settings describe the primary way in which your installation will be sending email. These settings can be individually overridden by any user by using the Misc. tab in the Setup process on the Control Center Toolbar.

- **SMTP (recommended):** Select this option to indicate that your installation primarily will be using SMTP for sending email. When you select this option, more fields will be available for specification.
- **MAPI:** Select this option to indicate your installation primarily will be using MAPI for sending email. You might choose this option if your email service provider does not support SMTP, even if authentication information can be provided. Sometimes, your ISP may disable SMTP traffic. You may need to discuss this with your ISP to enable SMTP support, or use MAPI.

If you specify SMTP, you will have the following options in the *SMTP Settings* group:

- **Server:** Enter your email server name. If the port number is not 25, enter the server name, followed by a colon, followed by the port number.
- **Use Authentication:** Check this box if your server requires authentication, and enter the following parameters as well:
    - o **Ignore Certificate Errors:** Check this box if your server has a self-signed certificate and you wish to ignore certificate errors.
    - o **User Name:** Enter the user login name.
    - o **Password:** Enter the user's password.
    - o **Enable SSL:** Check this box if your server requires SSL encoding.
  Because no legitimate SMTP server can be an open relay server due to spamming issues, chances are that you will need to provide authentication information if your mail server is hosted outside of your company. If you have an internal SMTP server (like Exchange), you could skip the verification since you can configure your internal mail server to relay emails from the internal IP addresses in your company.
- **Admin Email:** Enter the email address and name for the default From name and address. In Elliott, any outgoing Elliott-generated SMTP email will get its From name and address from User Setup in the Password Setup function. In the event that the From name and email are not specified or not valid in User Setup, this default Admin name and email will be used.

Additional Options

- **Amigos…:** Amigos is a term in Elliott referring to Notes, eContacts, Attributes, Events and Links. Pressing this button will display the following dialog:
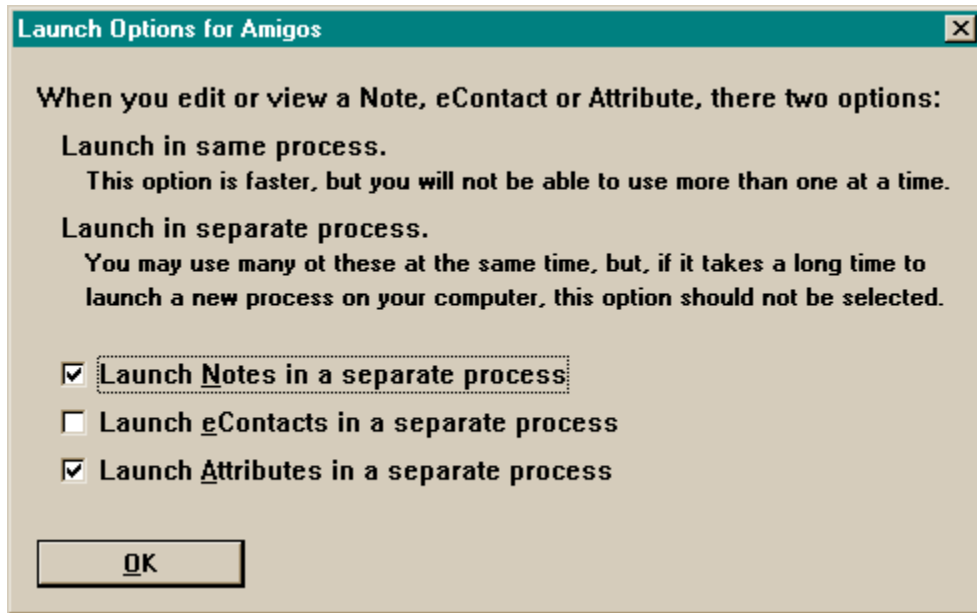
Here you specify how your users, by default, will interact with the Notes, eContacts and Attributes lists. When you check an option here, whenever you select a Note from the list of Notes, etc., it will appear in a separate process, independent of the process you are on. This allows you to view multiple Notes at the same time.

However, it takes longer to launch a separate process than to simply display the screen in the same process, and it takes more memory. If the majority of your users have workstations that are slow or have minimum memory, you should not check these options. Each user can override these system-wide defaults in the User Preferences screen.

- *Reports…:* Pressing this button will display the following dialog:
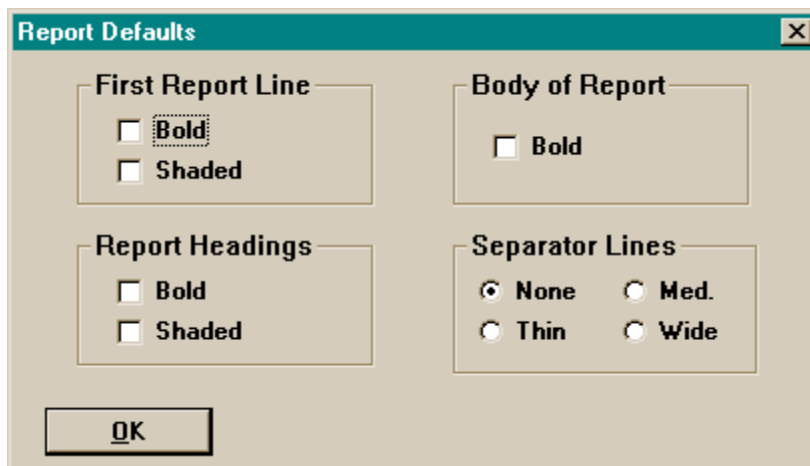
Check any of these options to alter the appearance of printed reports in Elliott.

- *More…:* Pressing this button will display the following dialog:
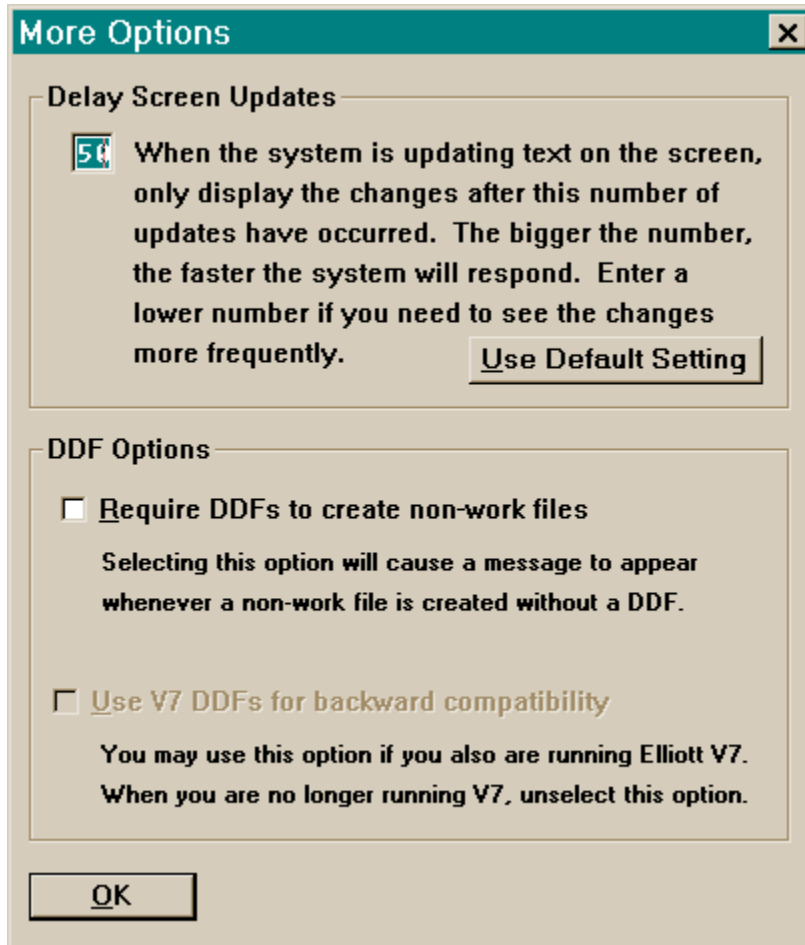
- **Display Screen Updates:** This is for changing the screen update interval. By default, the Elliott legacy screen updates for every 50 display actions or when there is an input field or condition that is waiting for a keystroke. For example, in customer file maintenance, Elliott displays all literals at one time instead of individually. This is for performance purposes. Sometimes, from a developer's standpoint, when you animate a program and do not see updates as the action is taking place, it can be confusing. This is one reason you may wish to change the default setting from 50 to 1, for example.
- **DDF Options:**
    - **Require DDFs to create non-work files:** Checking this box will cause a message box to be displayed whenever any non-work file is created without a matching DDF definition. This alerts the user that a file has been created that may not be SQL compliant and ODBC compatible and may prevent you from using tools like Crystal Reports to access the file.

When such a message box is displayed, make note of the file name. If SQL compliance is desired for that file, you need to obtain a DDF for it and run DDF2BTR.Exe against that file to bring its SQL definition up-to-date. SQL compliance is often desirable if you need to access the table through Report Writer or if another application depends on ODBC or ADO.NET integration.

- **Use V7 DDFs for backward compatibility:** If you are still running Elliott V7, you should select this option. It will make sure that any newly-created non-work files will use V7 DDFs. V8 DDFs have some structural differences, including single-column account numbers, which could conflict with Crystal Reports programs that use V7 DDFs.

  When you no longer are running Elliott V7, you need to unselect this option and run DDF2BTR.Exe on all your database files. That will make sure your database files match the V8 DDFs. You should also test and correct any external code (e.g., programs developed in Crystal Reports) -- there could be mismatched column names for account numbers.

Manual Configuration Settings

There are a few additional configuration options that most users will not need. If you want to specify any of the following options, use a text editor to modify EL800.CFG in the <root>\Bin directory. In the [Configuration] section, you can add the following options:

- **HideCCToolbar=Yes:** Specify *Yes* if you do not want your users to have access to the toolbar functions of the Elliott Control Center (main menu). We suggest that you not check this option since it will limit your users' Elliott V8 experience.
- **HideCCFreq=Yes:** Specify *Yes* if you do not want your users to see the Frequency columns for tasks in the Control Center.
- **HideCCProgram=Yes:** This will hide the *Program* column in the Control Center.
- **HideCCSeq=Yes:** This will hide the *Sequence* column in the Control Center.
- **HideCCLastRunByMe=Yes:** This will hide the *Last Run By Me* column in the Control Center.
- **DisableHelp=Yes:** Specify *Yes* if you do not wish give your users access to Elliott Help on the Internet.

User Email Settings

The Email Settings you specified previously will be used as the system default email settings. However, at each individual desktop level, you may override the default Email Settings. To override the settings, go to Setup/Preference -> Misc. tab -> Email Settings button. See sample screen below.

Whenever you change the entries in this section, you can press the *Test email...* button to verify your new settings.

Control Center

Logging into Elliott V8.0

When you launch Elliott V8.0 from a desktop icon or by typing EL800.EXE from the <root>\Bin directory, the following form will be displayed:
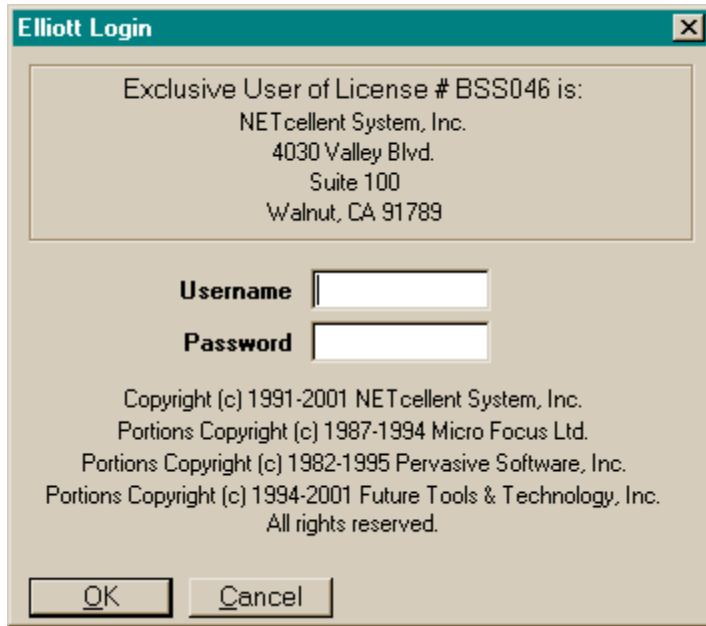
Initially, passwords are turned off, and the Username will default to SUPERVISOR. Just press *Enter* or click the *OK* button to log in. After passwords are turned on, a valid Username and Password will be required.

Elliott V8.0 Control Center

The Control Center replaces the Elliott main menu and module menus from previous releases. From the Control Center, you can launch nearly every feature of Elliott into a new process, independent of all other Elliott processes. The Control Center looks like this:
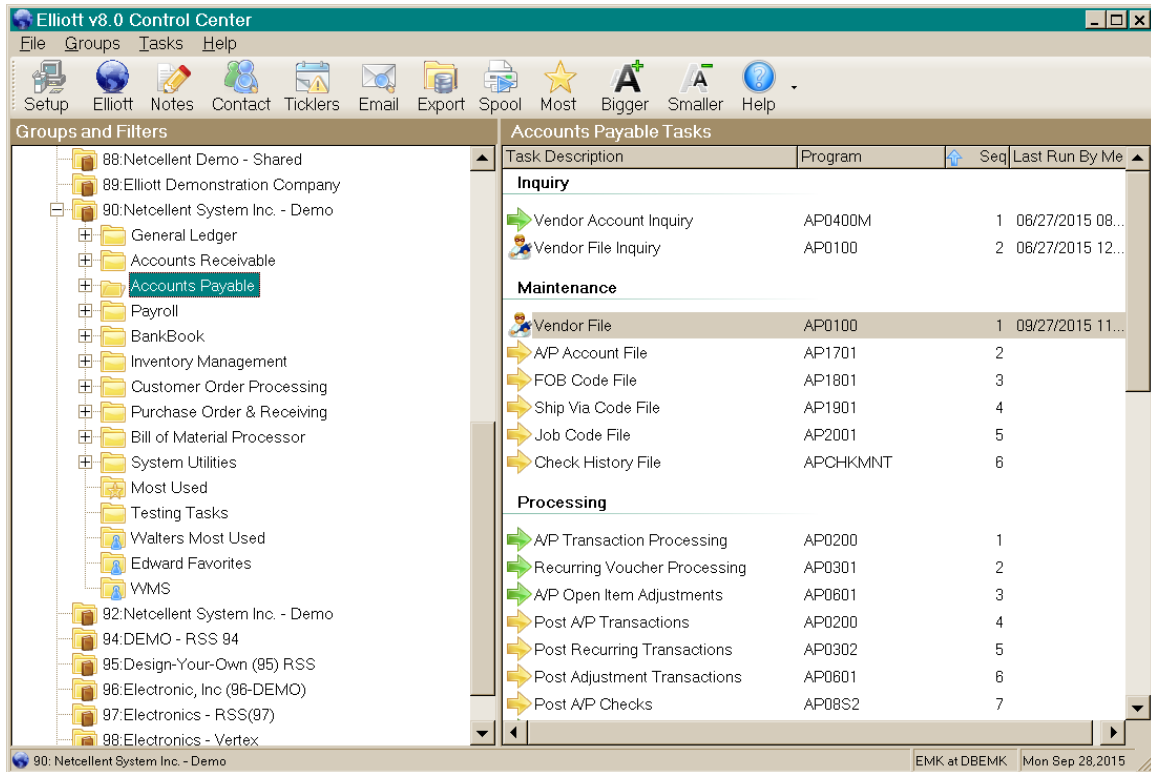
Across the top is a toolbar that provides access to common tasks. Hover the mouse over a toolbar button to see a brief description of the task.

Down the left side is a hierarchical treeview named *Groups and Filters* containing a list of the companies, and within the company a list of modules, and within the module a list of task types the user may run. There also is a special group of MostUsed tasks that is maintained automatically by Elliott. The user may also create one or more favorite groups of tasks by right clicking on the company node and choosing "Add New Group." Once new groups are created, you can populate the groups with tasks from multiple modules and types by just dragging and dropping tasks onto the new group. Selecting a node in this treeview will cause the applicable tasks to be listed on the right.

The right side contains a list of Elliott tasks that belong to the selected treeview node.

You may change the size and location of your Control Center window, and it will be saved the next time you start the Control Center. Similarly, you can adjust the relative width of the treeview and listview portions of the screen, and that will be saved as well.

Toolbar Tasks

- **Setup (User Preferences):** Click here to override the system-wide defaults for Elliott processing -- for example email settings. The changes you make here only apply to your particular desktop.

- **Elliott (Next Elliott Process):** Click this button (or press F9) to go to the next open Elliott process on your computer. This functionality is available on all Elliott processes.
- **Notes (User Notes):** Click this button to launch the notes application for notes related to your user id.
- **eContacts (Global eContacts):** Click here to launch your Global eContacts task. You can also launch this function by using EL800GE.EXE in the Bin folder.
- **Ticklers (Supervisor Ticklers):** Click this button to launch your Supervisor Ticklers where you can see your ticklers and those of your subordinates.
- **Email (eContacts Processor):** Click here to start the eContacts Processor (a.k.a., Mass Email). You can also launch this function by using EL800ME.EXE in the Bin folder.
- **Export (Export Processor):** Click this button to launch the Export Processor. You can also launch this function by using "EL800ME.EXE –E" in the Bin Folder.
- **Spooled (Spooled Reports):** Click here to launch the new Spooled Reports Manager.
- **MostUsed (Most Used Tasks):** Click this button to see a list of the tasks you have used most recently. This list is maintained automatically by the Control Center.
- **Bigger (Make fonts and icons bigger):** Press this button to make the fonts and icons bigger for the Control Center.
- **Smaller (Make fonts and icons smaller):** Press this button to make the fonts and icons smaller.
- **Help:** Click here to bring up Web-based help information for the highlighted treeview node or listview task, or help for the Control Center.

Groups and Filters

This area is used primarily to select a corresponding list of tasks in the listview to its right. There are some additional options also, depending on the node that is selected:
- **Top node (Elliott Business Software):** Right click on this node to select one of the following tasks:
  - **Add New Company**
  - **Password Setup**
  - **Setup (User preferences)**
  - **Hide Companies:** Select this option if you have some companies that you rarely use. Check off the companies you don't want to see every day. Later, you can use this option to make some companies visible once again.
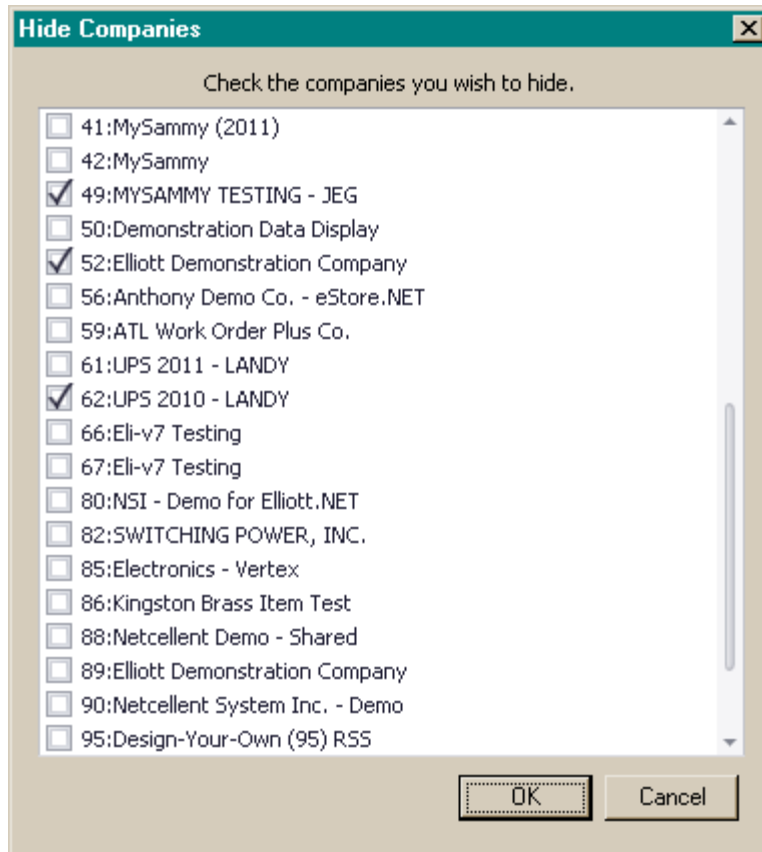
- **Company nodes:** When you click on a company node, the list of tasks you can use in that company is created, if it hasn't already been created (you will see a small "+" sign to the left of the company name when it is done). Further, you can right click on a company node to select one of the following options:
    - **Add new group:** Select this option to create a favorite group that you can then populate with the specific tasks that you want in that group (see *Customizing Control Center*, below).
    - **Spooled Reports:** This option will start a Spooled Reports Manager task for the selected company.
- **Module nodes:** When you click on a module node, like Accounts Payable, you will see the available tasks for that module to the right. When you double click on a module node, it will expand to show the task types for that module, or contract back to just the module, if the task types were shown. Right click on a module node to select one of the following options:
    - **Run:** Use this option to start a module-specific menu (like the A/R menu) if you want to use the V7.5 menu structure instead of launching separate tasks from the Control Center.
    - **Spooled Reports:** This option will start a Spooled Reports Manager task for the selected company with the selected module highlighted.
    - **Help:** This option will bring up Web-based help for the selected module.
- **Task Type nodes:** When you click on one of these nodes (like *Inquiry*, *Maintenance*, etc.), the tasks on the right will be restricted to that kind of task.

Available Tasks

The right side of the screen, below the toolbar buttons, is the listview containing the tasks that are available, according to the treeview node selected on the left. It has the following columns:

- **Task Description:** This is a short description of the task, preceded by an icon -- an arrow for most tasks or a star for the most-used tasks. The color of the icon indicates the relative risk of running the task, from green (low risk) to yellow (moderate risk) to red (higher risk).
- **Frequency columns:** For *Processing* and *Report* task types, there are six frequency columns: (D)aily, (W)eekly, (M)onthly, (Q)uarterly, (Y)early and (O)ther. Tasks can have multiple frequencies. For other task types, the frequency columns are hidden.
- **Program:** The Elliott program (Help-ID) called for this task.
- **Sequence number:** This represents the default sequence of the task within task type.
- **Last Run By Me:** Each time you run the task, this timestamp is updated.

You may sort the tasks by clicking on any column header.

To launch a task, highlight it and press the *Enter* key or double click a task. You may launch up to 10 tasks at once – simply highlight multiple tasks and press the *Enter* key.

If you right click on a task, the following options will appear:

- **Rename:** If you logged in as SUPERVISOR, you can select this option to change the name of the task as it will appear for all users.
- **Restore name:** This option allows the SUPERVISOR only to restore the original name of the task.
- **Run:** This is the same as double clicking the task.
- **Copy:** Select this option to copy a task into a user group by dragging and dropping it.
- **Delete:** This option allows you to delete a task from a custom user group only; for standard groups, it will be grayed out.
- **Frequency:** This allows you to change the frequency of a *Processing* or *Report* task, or to restore the original frequency.
- **Risk:** If you logged in as SUPERVISOR, you can change the risk level of the task here.
- **Sequence:** Selecting this option presents two more options:
  - **Move task(s):** Allows you to change the sequence of tasks by dragging them up or down in the list. This only works when you do <u>not</u> have multiple task types in the list.
  - **Restore default:** This option sorts the list back into the original sequence.
- **Help:** This will launch Web-based help for the selected task.

Running Special Programs

If you need to run a program that is not available in the Control Center navigation, you can use the *Run Special...* pulldown from the main *File* menu (this replaces the MSPL=FIX option in Elliott V7.x). For security reasons, this menu item is available only when you log in as SUPERVISOR.

After the File -> Run Special menu item is chosen, the following dialog is shown:
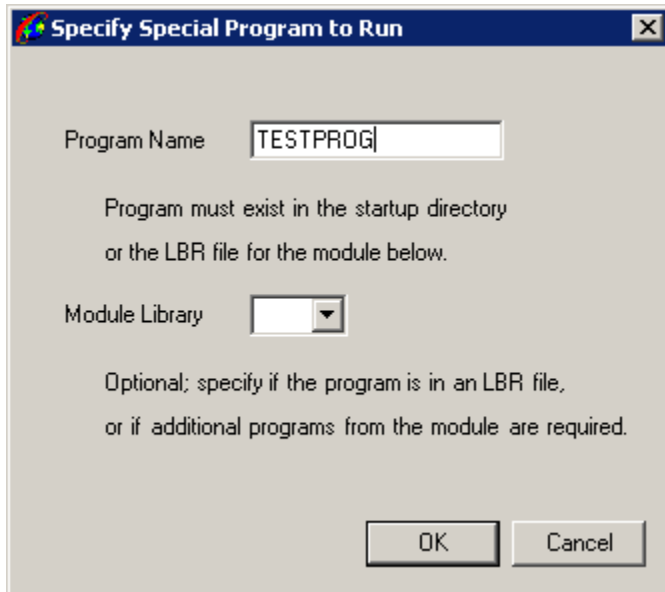
Here, you enter the name of the COBOL program you wish to run and, optionally, the abbreviation of the package where it exists or from which the special program will call additional programs. When you specify a module library, the .LBR files associated with that package are opened and the programs in those .LBR files are made available. If you leave *Module Library* blank, the INT or GNT extension program must exist in the startup (i.e., <root>\Bin) directory. When you press OK, the special program is launched in a separate process. Generally speaking, special programs are used for data conversion or fixing on a one-time basis. Therefore, they are not part of the Elliott Control Center navigation system.

The values on this dialog are saved in the registry and will be the default values the next time you use this function on this workstation.

Customizing the Control Center

The tasks in the Control Center may be customized at two levels:
- When user SUPERVISOR customizes the Control Center, those changes will apply to everyone using the company that was customized.
- Further, each user may create user groups for his/her purposes only, containing tasks from any module or task type within the same company.

To add a new custom group, highlight the company node in the treeview on the left and do the following:

- Right click on the company node.
- Select *Add new group*.
- Type the name of the new group and press *Enter*.
- Click on any module node or task type node in the same company and drag-and-drop one or more tasks from the list of tasks onto the new user group node.

You may add additional tasks from any other module or task type in the same company.

Any user can make the following customizations to the tasks in the listview on the right:

- Change Frequency by right clicking on the task and selecting *Frequency*.
- Change the sequence in the list by dragging the task up or down the list when the treeview node on the left has a Task Type selected.

Additionally, SUPERVISOR can change the description of the task and the risk level.

Note: All customizations to a company done by SUPERVISOR will be the defaults for all other users in that company.

Task Icons

The SUPERVISOR user has the ability to assign different icons for the tasks that each user will see across all companies.

To change the image associated with a task, the SUPERVISOR user can right-click on the task, select *Change Image,* then *Select Image...* and a list of available images will be displayed:

The SUPERVISOR user can select an image, then press *OK*, and that selected image will be shown for that task in the Control Center for all users of all companies.

Command Line Options

The Control Center can be started with the following options to change its initial behavior:

- **EL800CC /CO:nn /G:xxxx:** This option tells Control Center to position to the specified company and group.
- **EL800CC /CO:nn /R:xxxx:** This options tells Control Center to position to the selected company and group and start all the tasks associated with that group.

The following example tells the Control Center to position to company 01 and the group called "Accounting Tasks," and to start all the tasks in that group:

```
EL800CC /CO:01 /R:"Accounting Tasks"
```

Note that the company must be specified as a 2-digit number and that group names with embedded spaces must be enclosed in quotes.

Legacy Screens

The less graphical screens in Elliott, like Customer Maintenance, are referred to as Legacy Screens. They all have a similar appearance, except for the content in the main area of the screen:

```
90: Customer File Maintenance - [Netcellent System Inc. - Demo]          _ □ ×
 Add  Change  Delete  Numeric-list  alPha-list  Labels  eXit

 ✗ 🌐 ☐ 📋 📋 ⚙ 📝 📋 👥 🔗 ⚡ 📋 fx T_T A⁺ A⁻ ❓

    *   Customer No    BSS046   1. Bill To No
    2.  Sort Name      NETcellent System, Inc.
    3.  Corresp Name   NETcellent System, Inc.
    4.  Address-1      4030 Valley Blvd.
    5.  Address-2      Suite 100
    6.  City           WALNUT                   22. Slsmn Start    /  /
    7.  State          CA CALIFORNIA            23. Location     LA
    8.  Zip Code       91789                    24. Territory    CA
    9.  Country        U.S.A.                   25. Acct No 11100-00000
   10.  Contact        Edward M. Kwang              ACCOUNTS RECEIVABLE - TRADE
   11.  Phone No       909-598-9019             26. Ship Via    UG UPS GROUND
   12.  Fax No         989-598-9039             27. Terms Code  30 NET 30
   13.  Acct Date      10/25/93                 28. Discount %
   14.  Cust Type                               29. Taxable  ?  Y
   15.  Bal Method     O                        30. Exempt No
   16.  Stmnt Freq     M                        31. Tax Code 1  CA
   17.  Crdt Limit     999,999,999-Unlimited        CALIFORNIA SALES TAX
   18.  Crdt Rate      60N                      32. Tax Code 2  OC
   19.  Crdt Hold ?    N                            ORANGE COUNTY SALES TAX
   20.  Collector      EMK                      33. Tax Code 3
   21.  Salesman No    H    House Account
 Field Number ? ▯

 Netcellent System Inc. - Demo                004 EMK at DBEMK   ARCUSMNT
```

There are a few differences between V7.5 and V8.0 Legacy Screens:

- V8.0 Legacy Screens operate in their own process, independent of the Control Center. You may launch as many of these as the resources of your computer allow.
- In V8.0, the 2nd toolbar button, a globe, has the purpose of going to the next Elliott process. By repeatedly pressing this button (or the F9 key) you can cycle among the open Elliott processes.
- The font processing is more intuitive in V8.0:
    - Press the Font button (it looks like two letter "T"s) to bring up a combobox that displays a list of scalable font names (like "Lucida Console") and some specific non-scalable fonts and sizes (like "08x12 Terminal").
    - Change the font by selecting a font name in this combobox.
    - You can change the size of the selected <u>scalable</u> font in two ways:
        - Clicking the Font Bigger ("A+") button or Font Smaller ("A-") button button to the right of the Font button will increase or decrease the size of the font, respectively.
        - Resize the window by dragging the bottom right corner of the screen. When you are done changing the size of the window, Elliott will use the size of the selected font that is closest to the new screen dimensions.
    - If you select a <u>non-scalable</u> font in the combobox (one with a dimension and font name), the "A+" and "A-" buttons on the toolbar will be grayed out, and you will not be able to resize the screen – the size of the screen is determined by the size of the font.
- Each task you launch from the Control Center will remember its location on your desktop for the next time it is used.

- V8.0 legacy screens support a new auto-link feature for telephone numbers and email addresses. If the user right-clicks on a piece of text on the screen that is in the format of a telephone number or an email address, a popup menu will display an option to dial the number or start an email.
  - Currently, 10- or 12-digit phone numbers that contain only 0-9, dash and period are supported. Elliott supports this function through Windows Telephony API. To use this feature, you will need a digital phone system that supports Telephony API.
  - Valid email addresses are supported.

Three Application User Interfaces for Legacy Screens

Elliott V8.0 legacy screens can be run in three different user interface modes:
- **PC:** This mode is the standard mode. It has small toolbar buttons and its menus are normal Windows menus that are meant to be used with a mouse.
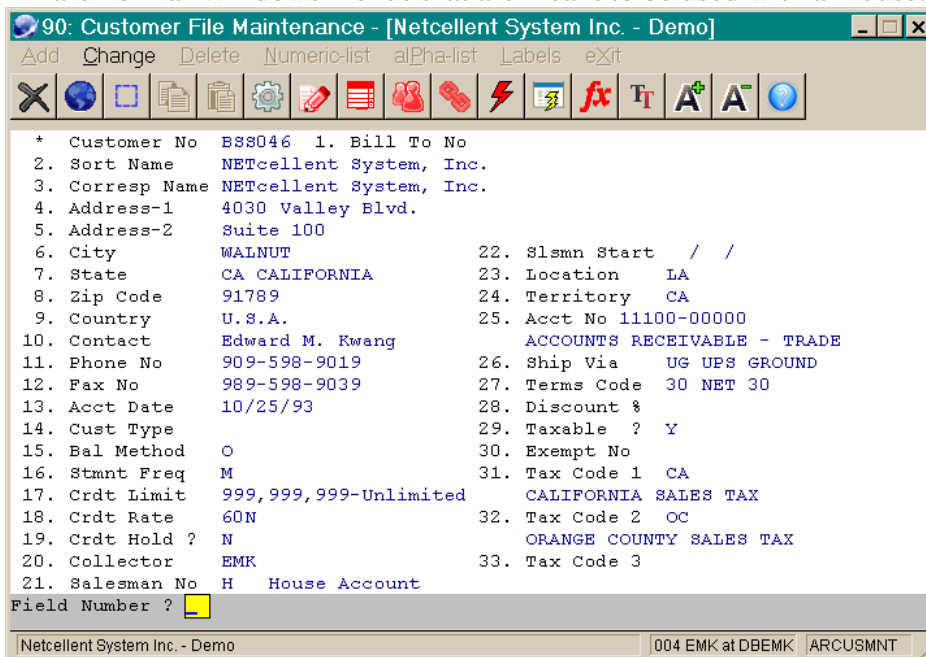

- **Tablet:** This mode is suitable for running on tablet devices (like iPads, Surface Pros or Android tablets). It favors a touch interface over a mouse. It has two rows of toolbar buttons and its menus are presented as buttons.
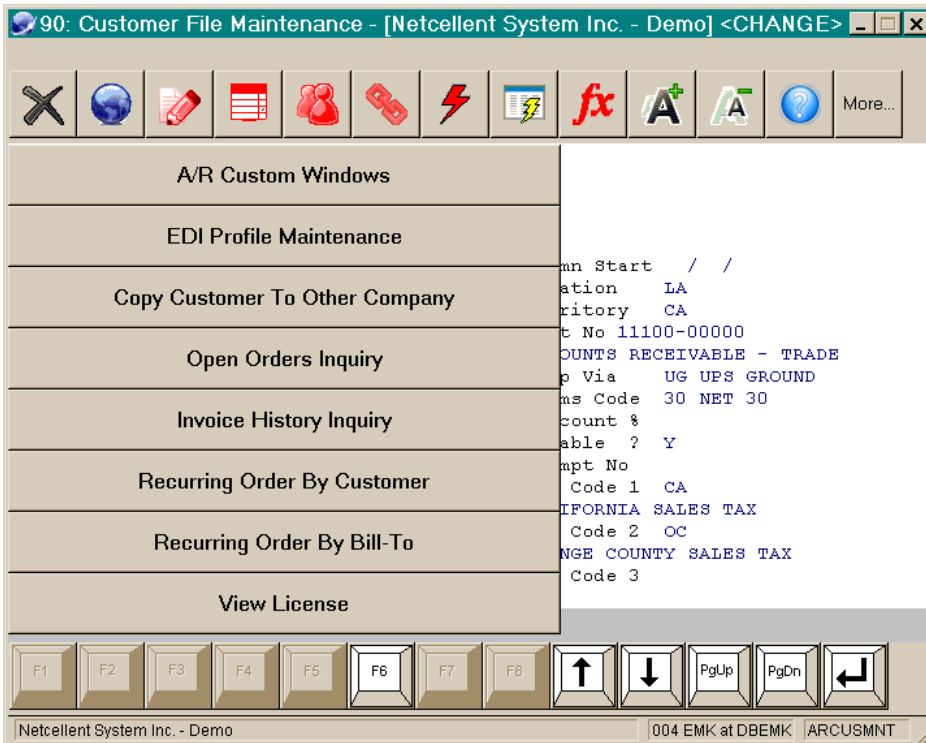
- **Mobile:** This mode is for running on mobile devices with very little screen area. It has two rows of large toolbar buttons and its menus are presented as buttons.
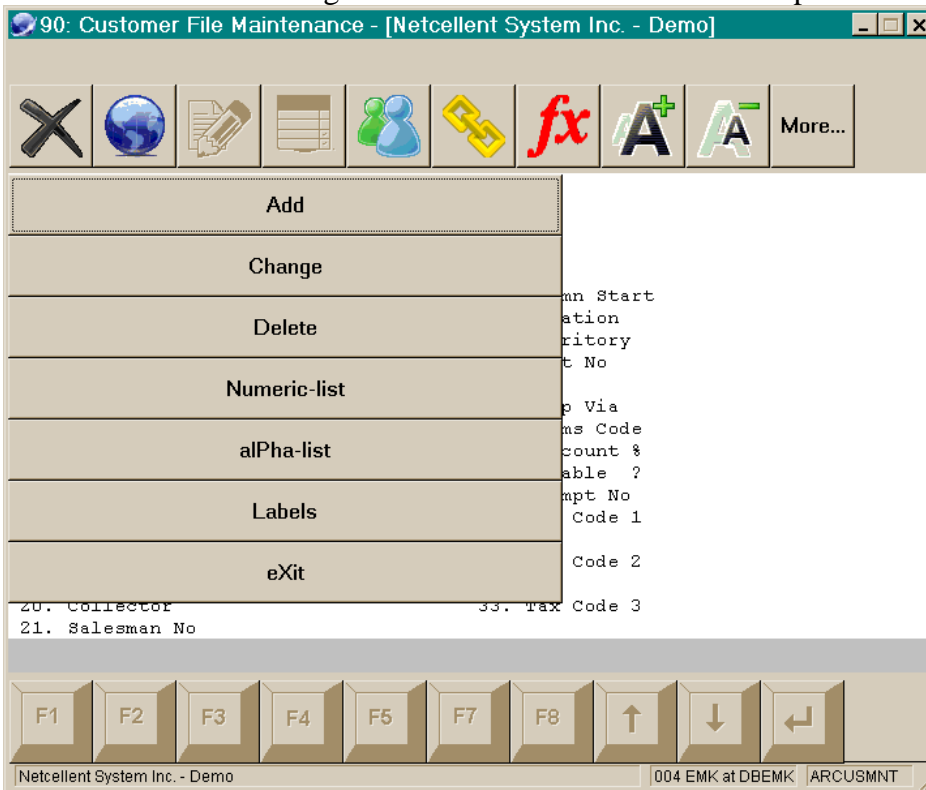
Each user may select the application UI style by clicking the *Setup* button on the Control Center, then the *Change format…* button on the *Input/Fonts* tab:
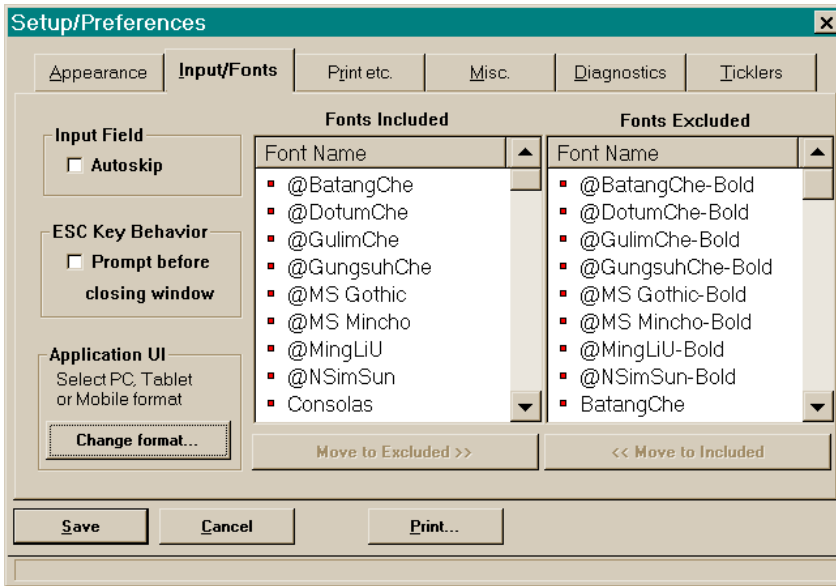
The following dialog box will appear where the desired user interface can be selected:
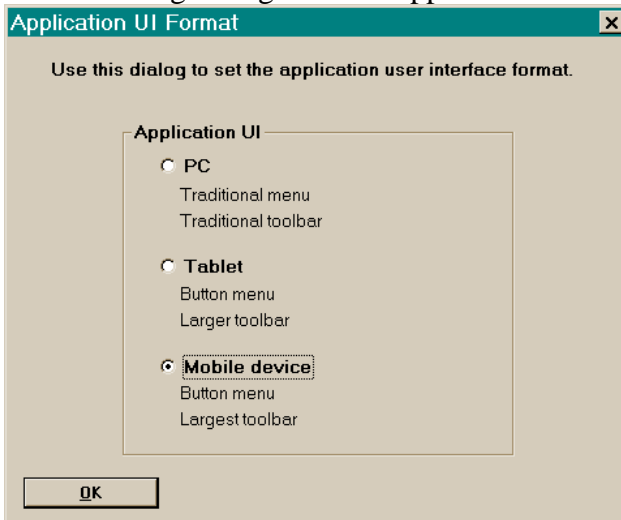
Support Function Keys through Barcode Scanning

With the Tablets and Mobile user interface, you may now touch the function keys on the screen instead of touching the keyboard. In some situations, it may be more efficient if you don't touch the keyboard and the screen at all. Certain applications for the warehouse, like "Shipping Verification", are designed for barcode scanning as the primary input. If the user can scan a barcode to cause Elliott to think that a certain function key is pressed, then user can just operate with a barcode scanner, improving efficiency.

To support this function in Elliott V8.0, if you can make the following characters as "code 128" barcode, then Elliott will recognize them as the corresponding function keys:

- ~UP

- ~DOWN
- ~PAGEUP
- ~PAGEDOWN
- ~ENTER (recommend implementing as generic ASCII Code 13)
- ~ESCAPE (recommend implementing as generic ASCII Code 27)
- ~F1
- ~F2
- ~F3
- ~F4
- ~F5
- ~F6
- ~F7
- ~F8
- ~F9

Within Elliott V8 applications, inside any input field, the system recognizes the special character tilde "~" and expects to see one of those combinations above to follow. When that happens, Elliott will convert the input "~" value into the corresponding function key.

You may produce these function key barcodes through any commercial barcode software like Bartender. For your convenience, we are providing these barcodes below. You can simply print this page out and use it.

~DOWN | ~F1 | ~F2

~F3 | ~F4 | ~F5

~F6 | ~F7 | ~F8

~F9 | ~PAGEDOWN | ~PAGEUP

~UP

Keep in mind that these barcodes are only recognized as function keys inside Elliott V8 applications. If you scan them outside of Elliott V8, they would just be recognized as their corresponding ASCII values.

Since the Enter and Escape keys are ASCII codes, they can be implemented as generic Code 128 barcodes directly. They are provided below for your convenience. Keep in mind that these two barcodes are not only recognizable when you scan in Elliott V8, they can be recognized by other applications as well:


«CR»

«ESC»

Legacy Screen Behavior Alternative

By default, when a task returns to its first menu, pressing the *ESC* key will terminate the process. Some users of V7.5 may find this behavior difficult to adapt to. There are two things that may help:

- Instead of launching individual tasks from the Control Center, instead launch a legacy screen that starts with a module's main menu, like ARMENU. When started in that way, as a task is completed, pressing the *ESC* key will return to the module menu rather than terminating the process. To launch a module's main menu, highlight a module node in the treeview, right click it and choose *Run*.
- In *Setup / Preferences*, on the *Input\Fonts* tab, in the *ESC Key Behavior* section, select the *Prompt before closing window* option. This option, when checked, will not terminate the process when the task has returned to the original menu and *ESC* is pressed – instead, the user will be prompted to confirm the termination, and can decide not to terminate.

A Productivity Example

You can combine a few of the new features of Elliott to create a very productive desktop environment. For example, you can create a new user group, like the one called "My Accounting" in the screen below and then drag several related tasks to the group:
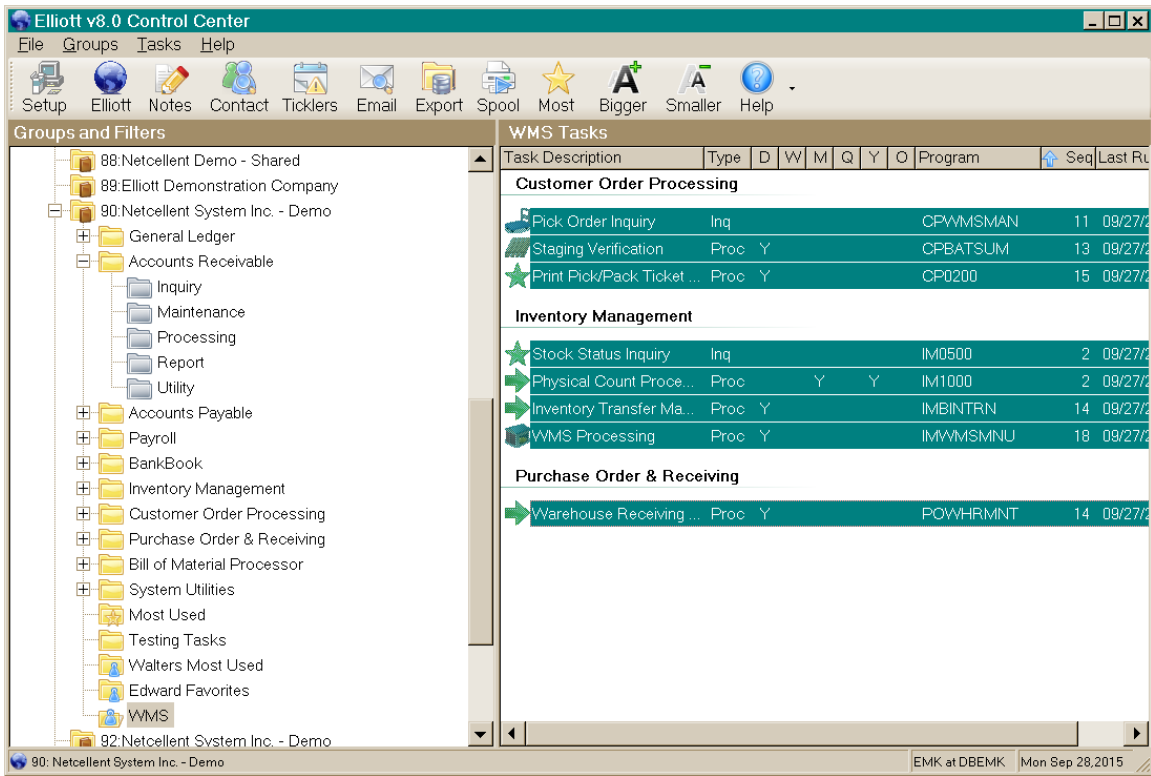
Then highlight many or all the tasks in this group and press the *Enter* key:
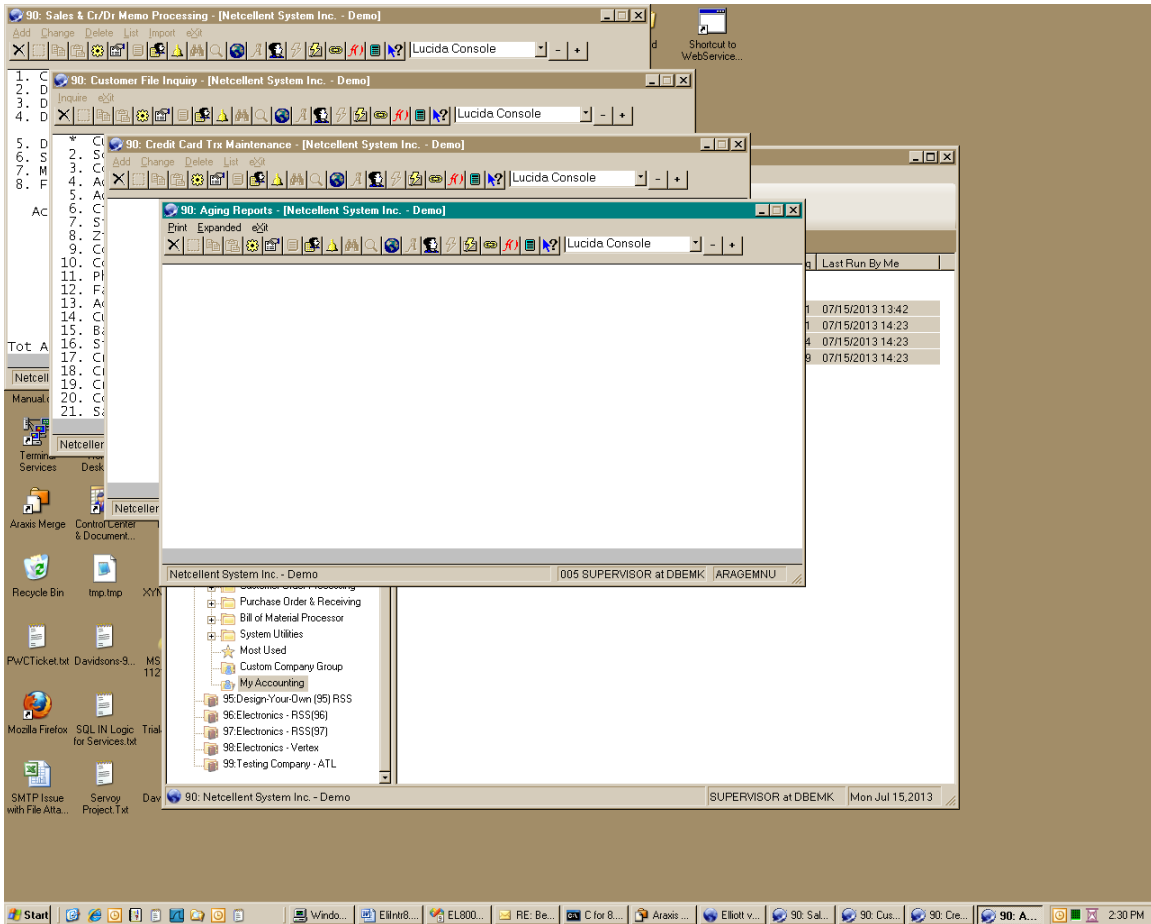
The highlighted tasks are all launched and located where they last were on the desktop. This example shows how you can quickly launch several related tasks onto your desktop to jump-start your work with Elliott.

Directory Structure and Security

Elliott 7.x

To allow easy comparison and understanding of the directory structure in Elliott 8.0, we are providing this review of the Elliott 7.x directory structure:

<root>	System level programs, registration files, USER#999.DAT and ULOG#999.DAT (for user licensing control) and some BTR files that are common to all DATA folder is in <root>. The BTR files include SYSPASS.BTR, SYUSERS.BTR and SYEVENT.BTR which are none company specific. In addition, when a new company DATA_?? folder is created; standard files will be copied from the <root> directory to the DATA_?? Subfolder.
<root>\Data	The Elliott primary company (01) that stores Elliott *.BTR data files, *.DAT data files, Spooled Reports and Log Files.

<root>\Data_02 …	The second company and onward like DATA directory.
<root>\Tutorial	This is a folder for tutorial company just likes DATA. However, no Elliott security apply to this directory.
<root>\Programs	The Elliott application level programs reside in this folder.
<root>\Help	The Elliott file accesses error messages and online help
<root>\Doc	The Elliott electronic documentation in PDF format.
<root>\DDF	Database Definition Files (DDF) in V3.0 format for legacy application to interpret Elliott BTR files content.
<root>\DDF40	DDF in V4.0 format for ODBC access.
<root>\Forms	Elliott Laser Form Template Files
<root>\Wave	Elliott sound files for ticklers and shipping verification
<root>\ other misc. directories	

Elliott 8.0

In Elliott V8.0, the directory structure has been rearranged to make it easier to configure NTFS security:

<root>	• There are no programs in V8 that reside under <root> folder. All root folder program files are moved to <root>\Bin folder. • Elliott no longer creates temporary files like USER#999.DAT and ULOG#999.DAT in root directory for user licensing control purposes. • Only BTR files continue to stay under the <root> directory. In addition to the same BTR files as in 7.x, a few BTR files are added to the <root> folder: USERS.BTR (user licensing control), SYMNUHST.BTR, SYCSTMNU.BTR and SYCSTGRP.BTR (V8 Control Center).
<root>\Data	The Elliott primary company (01) that stores Elliott *.BTR data files, *.DAT data files. Spooled Reports and Log Files are moved to the Reports and Log folder.
<root>\Data_02 …	The second company and onward like DATA directory.
<root>\Tutorial	This is a folder for tutorial company just likes DATA. No Elliott security apply to this directory.
<root>\Bin	All <root> directory program files, DLL files, registration files and <root>\Programs directory program files are moved to this folder. By moving program files away from <root> directory, you only need to give minimum NTFS security to the <root> directory and enhance your Elliott application security.
<root>\Bin\ErrorMsg	It is the same as <root>\Help folder in Elliott 7.x. It is renamed because this folder no longer contains online help files. It is moved under the Bin folder to simplify directory structure.

|	
<root>\Bin\Doc	It is the same as <root>\Doc folder in Elliott 7.x. It is moved here to simplify the directory structure.
<root>\Bin\DDF40	It is the same as <root>\DDF40 folder in Elliott 7.x. It is moved here to simplify the directory structure. In Elliott 8.0, we do not need files in the <root>\DDF folder.
<root>\Bin\Forms	It is the same as <root>\Forms folder in Elliott 7.x. It is moved here to simplify the directory structure
<root>\Bin\NewData	When create a new company, system used to copy standard files from <root> to DATA_?? subfolder in 7.x. Now system copy from the <root>\bin\NewData instead. This simplifies NTFS security requirement. The following is a list of these standard files: • X*.BTR: DYO Forms & Fields • SYZIPCDS.BTR: Zip Code Crosss Reference • ARCOUNTY: County Cross Reference • SYCITY: City Cross Reference • WSORDHDR.BTR: Web Services Order Header • WSORDLIN.BTR: Web Services Order Line • NWSMFORM.BTR: Laser Form Templates We used to copy <root>*.DFF in 7.x to support certain legacy applications require DDF and BTR files in the same DATA_?? folder. We no longer do that in 8.0.
<root>\Bin\Wave	In is the same as <root>\Wave folder in Elliott 7.x. It is moved here to simplify the directory structure.
<root>\Reports	Reports used to reside under DATA folders. It is now moved to this folder to simplify the structure. The subdirectory structure under Reports is like <root>\Reports\<company>\<module>.
<root>\Log	Log used to reside under DATA folders. It is now moved to this folder to simplify the structure. The subdirectory structure under Log is like <root>\Log\<company>\<module>. Most Log files are saved in the Log folders and subfolders, but there are some exceptions. Some may be saved in the Windows %Temp% directory. SimEvent.log file is the online credit card processing log file that is stored in the Bin folder.
<root>\other misc. directories	

NTFS Security in Elliott 8.0

The changes to the directory structure in Elliott 8.0 make it easier to organize Elliott directories with NTFS security.
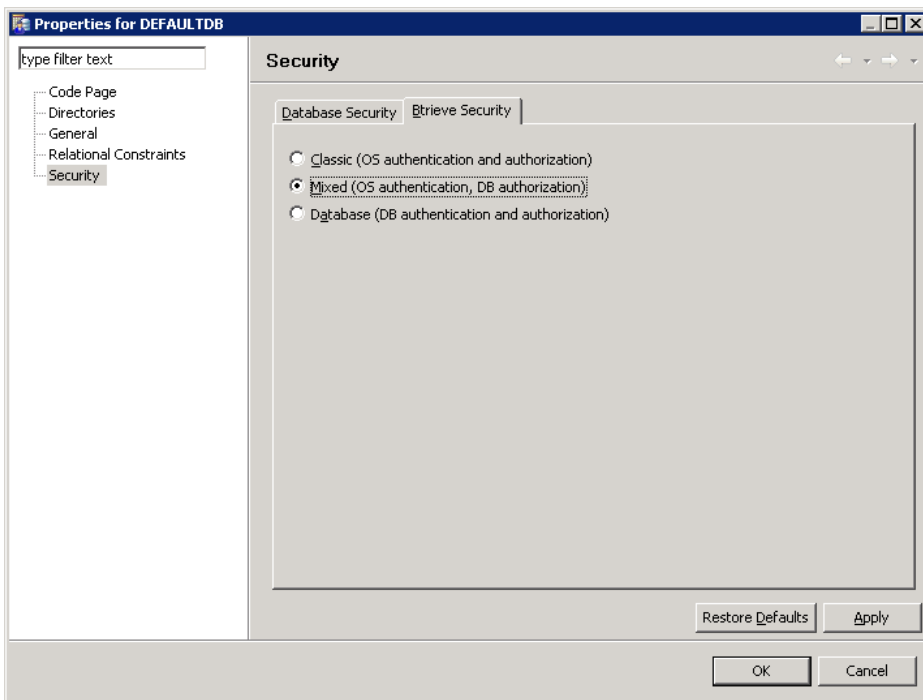
PSQL Mixed Mode

First, configure your PSQL engine to use mixed mode security. Starting in PSQL 8.5, the transaction engine (Btrieve) comes with three different modes to control security:

- **Classic**: This is the old way (PSQL 8.0 or earlier version) that PSQL security works. If you need to read a Btrieve file, you will need to have the NTFS read security. If you need to write a file, you will need to have the NTFS modify security. Elliott has hundreds of tables, and thus hundreds of Btrieve files. It is almost impossible for IT to determine which users should have what NTFS rights for each table. So with this kind of security model, we typically suggest that IT granting users the full rights to our DATA folder. As a result, the NTFS security for the DATA folder is wide open. It's not a desirable situation, but this is the default mode when you install PSQL on a server for backward compatibility.

- **Mixed**: This means the user does not need to have any NTFS rights to a table (i.e., a Btrieve file) in order to read and write to that table. The PSQL engine is running on the server with the "system" user privilege, which is like a local admin. So the PSQL engine will not have any NTFS issue when accessing a Btrieve file. By using this mode, we can restrict the NTFS right to the DATA folder. Then you simply let the application (Elliott Business Software) to control the security. This is much better for security control purpose and is the mode we want to use.

- **Database**: This mode means we need to login to a database user with a password in order to access the proper tables. This method is not applicable to Elliott Business Software.

To change PSQL from classic mode to mixed mode, bring up the PSQL Control Center on the server console. Go to Engines/your server/Databases. Right Click on DEFAULTDB and choose Properties.
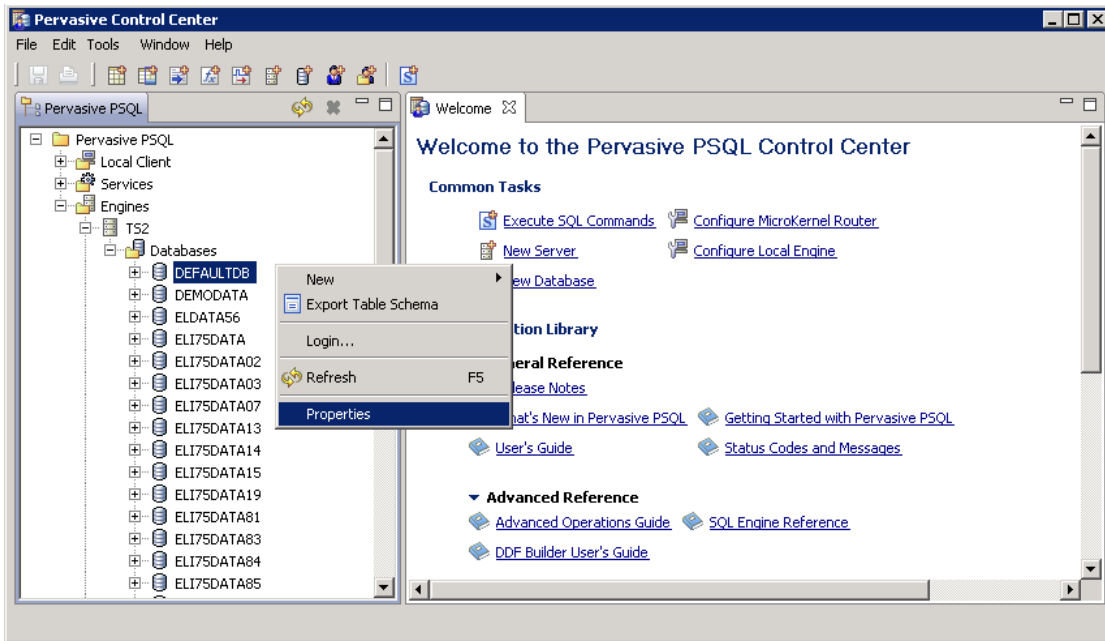
Choose Security and then click on the Btrieve Security tab. Choose the Mixed option and click on Apply. Once you do this, the server will need to be rebooted for the changes to take effect.


Once you have configured your PSQL engine to use mixed mode security, the user does need to have NTFS rights to Elliott's database, which is stored in *.BTR files in the DATA folders. This is the first step to tie down the Elliott folder NTFS security.

## Apply NTFS Security to Elliott Folder and Sub-Folders

<Drive>: After setting up the PSQL server to use "mixed mode" security, you need to at least give the "**Traverse Folder/List Folder**" rights to the mapped Elliott drive-letter level (e.g., M:\). Otherwise, the user can't even map the network drive (e.g., M:) successfully. This is considered the minimum right, which means the user can see the folders and files through Windows Explorer, but the user does not have the right to read the content of the files or copy it and paste it somewhere else. Therefore, all contents under this drive is secure even after you give users this minimum right. The List Folder and Traverse rights are available under the Advanced Security options.

<root>: You don't need to do anything at Elliott root directory level (e.g. M:\Elliott7.) The "Traverse Folder/List Folder" right you define at the drive-letter level is automatically inherited by Elliott root directory.

The following example shows that we assigned the NTFS "Traverse Folder/List Folder" rights to the drive level. As a result, at the Elliott <root> directory level, the same rights are inherited. Because the right is inherited, the check box is "grayed out."
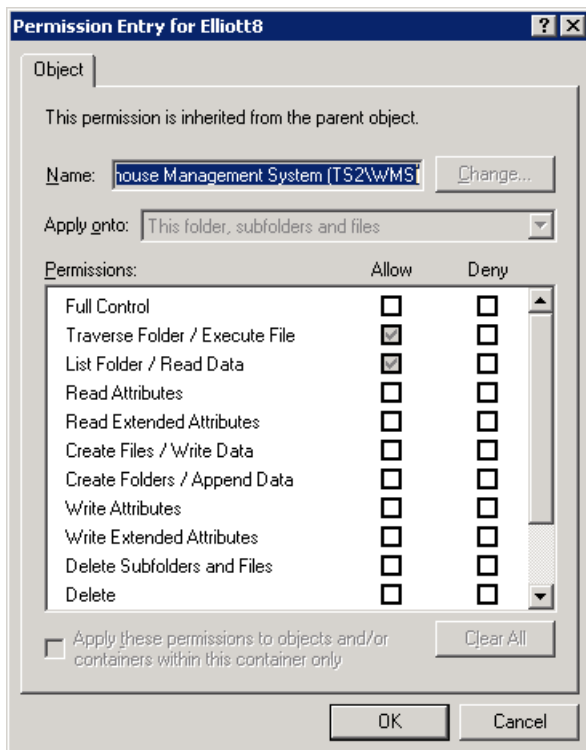
<root>\Bin: You must give non-admin users Read & Execute rights to the <root>\Bin folder. By default, sub-directories will inherit this right too. One exception is that when you use the Elliott online credit card interface, the Payware interface module will create SIMEvent.Log file in the Bin folder. We can't redirect this file to our Log folder due to the interface module's limitation. You will need to give online process credit card users the Write right to this file.
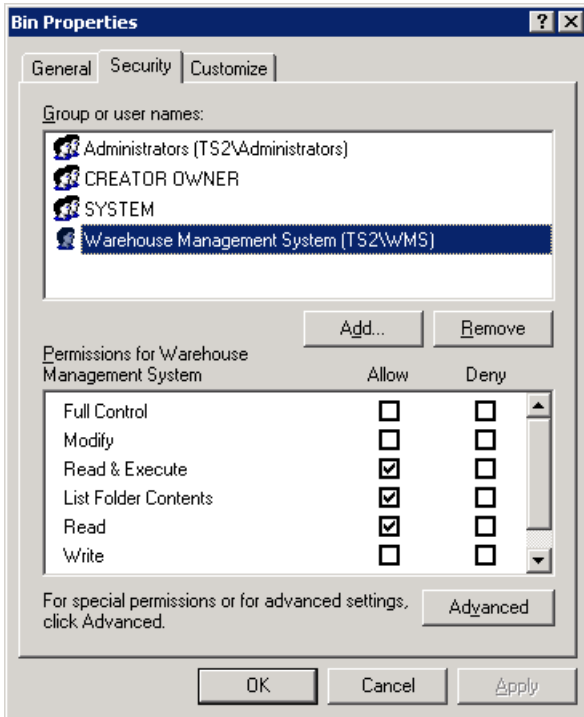
\<root\>\DATA and \<root\>\DATA_??: Assign Write right for the users. This will give the users the right to create work files that are used by certain applications. This right does not give users the read permission. In addition, user cannot modify existing data to corrupt it. Therefore, your DATA folders are secure even after you give your users the "Write" permission.
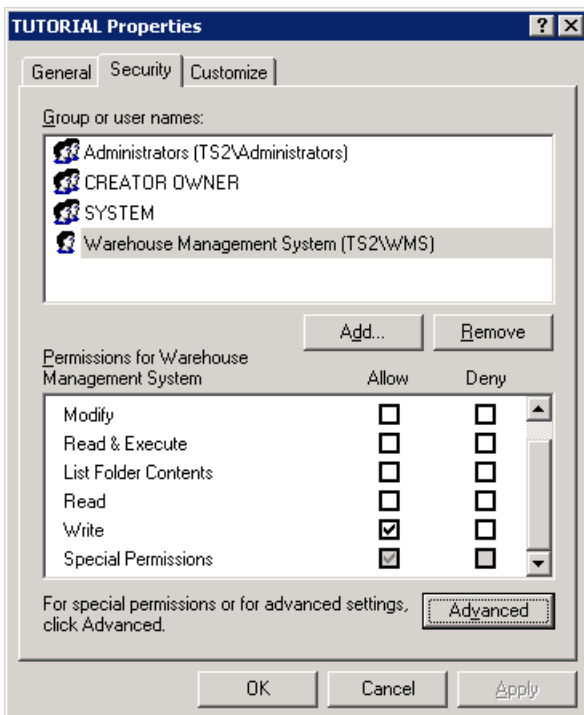
<root>\DATA*.DAT and <root>\DATA_??*.DAT: Assign Modify rights for all users. The reason for this is because *.DAT files are not controlled by the PSQL engine. Elliott directly updates these files. So you will need to give the "Modify" right to all *.DAT files under the DATA, DATA_?? and TUTORIAL folders. In a future version, we intend to phase out *.DAT files and convert them to Btrieve files so this is no longer an issue.
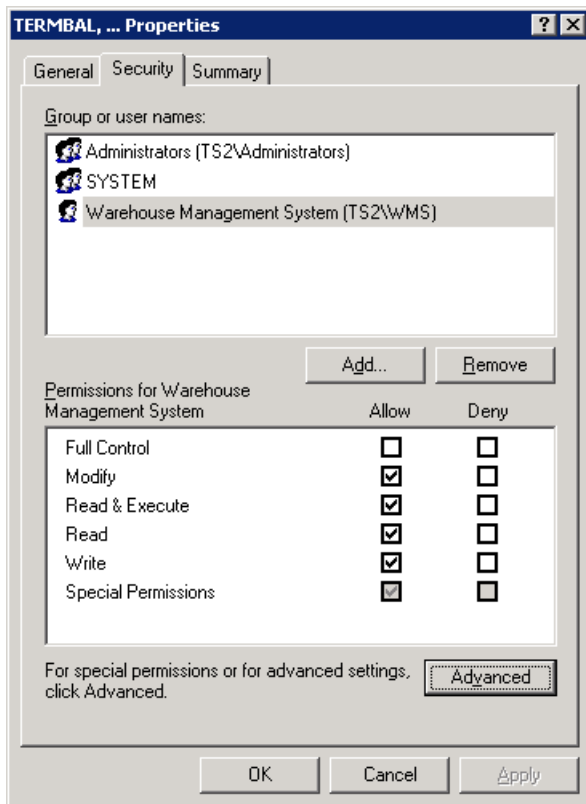
<root>\Reports: You need to give "Write" rights to users. This will also give the user "Create Folder" rights. When the Spooled Reports application is launched for the first time, the company sub-directory under the Reports directory is created along with a directory for every package in the system. If this application is run by a user with full rights to the Reports directory, all of the directories will be created. If a user without "Create Folder" rights attempts to print a report or access the Spooled Reports application, he/she will receive an error stating that the directory cannot be created.
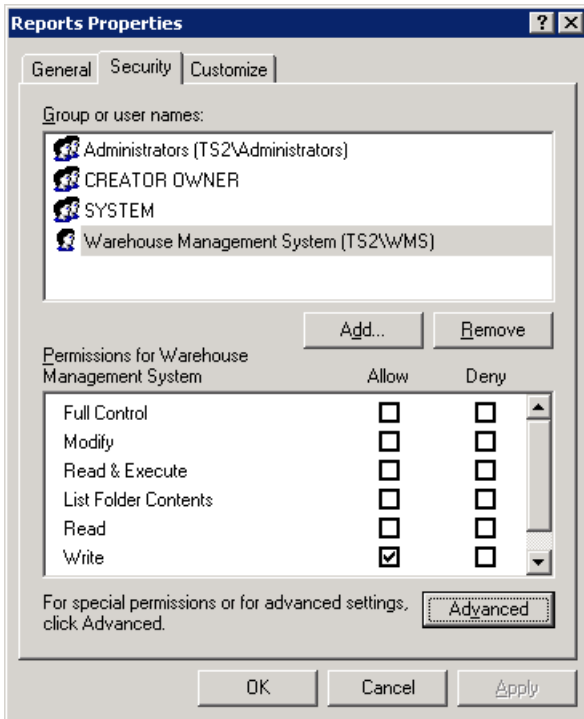
For supervisors who can view, archive or delete other users' spooled reports, it is necessary for IT to assign these users "modify" rights to this folder.

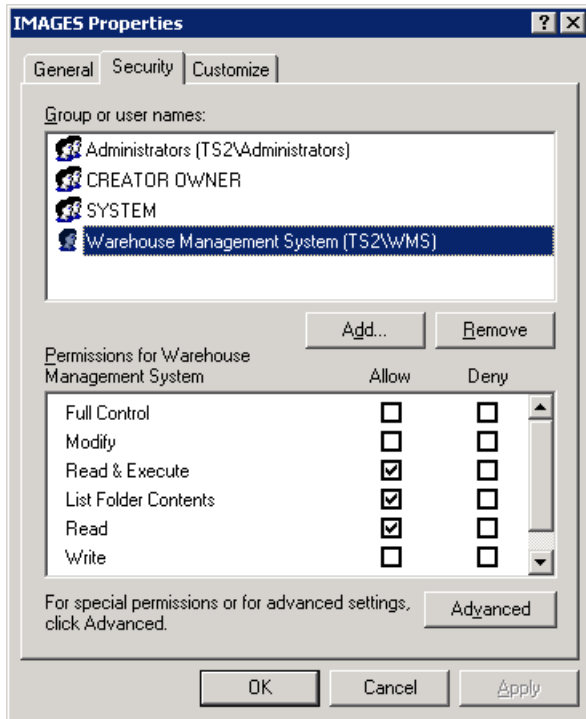**<root>\Log:** It is necessary to give non-admin users Modify rights to the <root>\Log folder so Elliott can update the log files for support and auditing purposes.
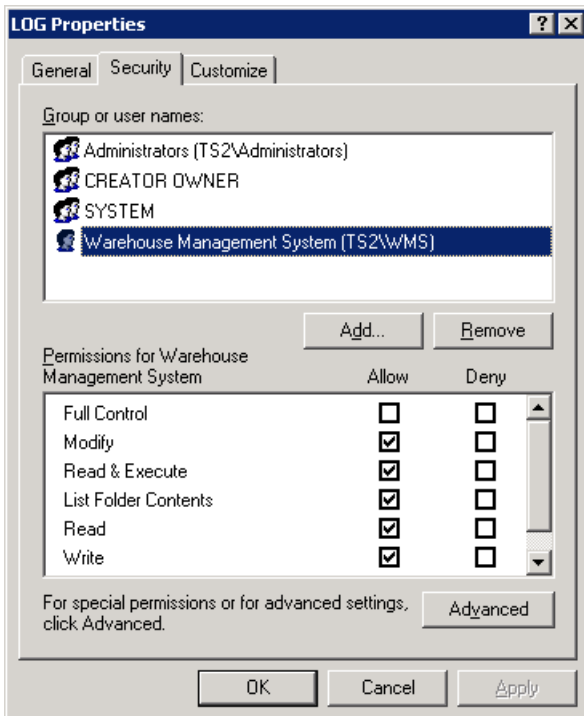
<root>\Images: We suggest giving non-admin users Read & Execute rights to the <root>\Images folder.

The Minimum Right of a Non-Admin User

The following is a re-cap of NTFS rights and the minimum privilege to give to a non-admin user in order to run Elliott 8.0. You may adjust and give more NTFS privileges as needed.

- **<Drive:>**: Follow the explanation above; grant "Traverse Folder/List Folder" right.
- **<root>**: Inherit the "Traverse Folder/List Folder" from the parent folder, so you don't need to do anything.
- **<root>\bin**: Follow the explanation above; grant "Read & Execute."
- **<root>\DATA**: Follow the explanation above and grant "Write" rights.
- **<root>\DATA*.DAT**: Follow the explanation above; grant the "Modify" right to all *.DAT files in DATA, DATA_?? and TUTORIAL folder.
- **<root>\Reports**: Follow explanation above; grant the "Write" rights.
- **<root>\Log**: Follow the explanation above; grant the "Modify" right to this folder.

For more details, please refer to the following Knowledge Base article: http://support.elliott.com/knowledgebase/articles/654601-elliott-8-0-directory-structure-and-ntfs-rights.

Web-Based Help

Help files are no longer installed with Elliott software. Pressing Shift-F1 or using context menus for help will result in launching a process to get the help information from the Web. Because help files are centrally maintained, they can be updated on a timelier basis.

Note: Access to Web-based Help can be removed for the entire installation by selecting the *Disable On-Line Help* option of the Elliott V8.0 Configuration utility (EL800CF).

Continuous Notes Enhancement

New Capabilities

The Notes functionality in Elliott version 8.0 has been enhanced to allow for continuous, free-format notes. The following capabilities have been added:

- **Continuous content:** You will be able to scroll the entire content of the note on a single screen regardless of how many physical records are required to store the note content.
- **Word wrap:** Text can be typed continuously and the content automatically will be split between lines based on word boundaries. You also will be able to insert and delete text on an existing line and have the current and following lines reformat on word boundaries.
- **Cut-and-paste:** You will be able to use the normal text cut and paste operations (and Ctrl-C, Ctrl-X and Ctrl-V keystrokes) that you use in all your other computer applications.
- **Undo:** A single level of Undo is supported.
- **Change to paragraph:** A note created in Elliott v7.5 will have a CR/LF at the end of each line. You can select any sized portion of such a note and use the *Change to paragraph* option to remove the CR/LF pairs and allow the text to word wrap from line to line.
- **Find-and-replace:** You can search for and optionally replace strings in continuous notes.
- **Note copy functionality:** In addition to creating new notes from other notes, you now can append the content of other notes onto a continuous note.
- **Customizable Notes list:** The Notes list window has been enhanced with the following new capabilities:
  - The window is resizable, allowing for more columns and more rows of information.
  - The columns displayed are configurable, allowing you to choose which columns will be displayed and how wide each column will be.
  - The *Subject* column has been expanded to include the first page of content of the note. Hovering the mouse over a row in the *Subject/Content* column provides a popup preview of the content of the note without having to drill down to the note itself.

Restrictions

- **Note types with labels:** Notes that are assigned to Note Types that have predefined labels will continue to use the current single-line, single-record method for viewing and editing the note. Also, the content of such notes cannot be appended automatically onto a continuous note.
- **Ticklers:** Notes that are also Ticklers will continue to use the current single-line, single-record method for viewing and editing the note. Continuous notes that contain more than 10 lines cannot be changed to Ticklers.

Compatibility with Elliott v7.5

Notes created in either version of Elliott (v7.5 and v8.0) can be viewed and edited using the other version. In v7.5, the current single-line, single-record method is used, and in v8.0 the enhanced method is used for non-Tickler, non-labeled notes. There is one restriction: when using v7.5 to edit a v8.0 multi-record note, you are not allowed to insert or delete a line if the note is continued on another record (because it would not adjust the following record(s) properly). You should use v8.0 if you need to insert or delete a line in a multi-record note.

Report Processing

Multiple Report Destinations

Elliott V8.0 report processing now supports multiple report destinations. The *Report Output Options* screen has a new tabbed dialog where you may specify any combination of simultaneous report outputs:
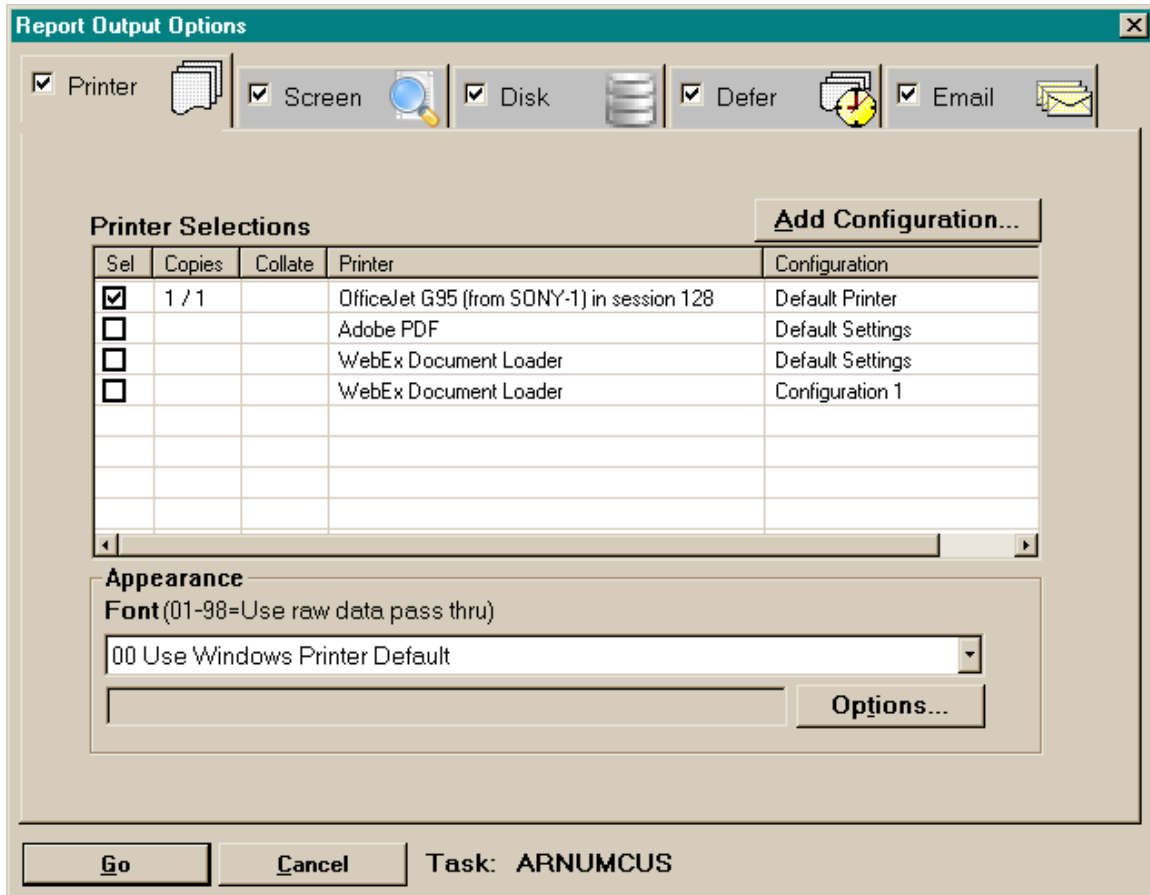
Each of the five tabs has a checkbox, title (e.g., "Printer") and icon. In the example above, the report will be sent to all five destinations (all checkboxes checked). **It is important to know that when you click on different areas of a tab, it means different actions.** Here are the conventions for clicking on areas of the tabs:

- **Click on the checkbox:** If you click on a checkbox, the status of the checkbox will change from checked to not-checked, and vice-versa.
  - o If the status changes to checked, that tab will come to the foreground where output-specific parameters can be changed.
  - o If the status changes to not-checked, that tab will not be brought to the foreground (no output parameters need to be set).
- **Click on the title:** If you click on the title (i.e., the word Printer, Screen or Disk…etc.) or background of the tab, it will bring that tab to the foreground without changing the checkbox status.
- **Click on the icon:** If you click on the icon, that tab will come to the foreground, its checkbox will be checked, and all other checkboxes will be unchecked. Clicking on an icon is a quick way to indicate a single output destination is desired.

Printer Output (see above screen capture)

On this tab, you can add additional printer configurations, specify one or more printer output configurations, change font selection and change additional options, like laser form number. This portion operates like V7.x.

Screen Output
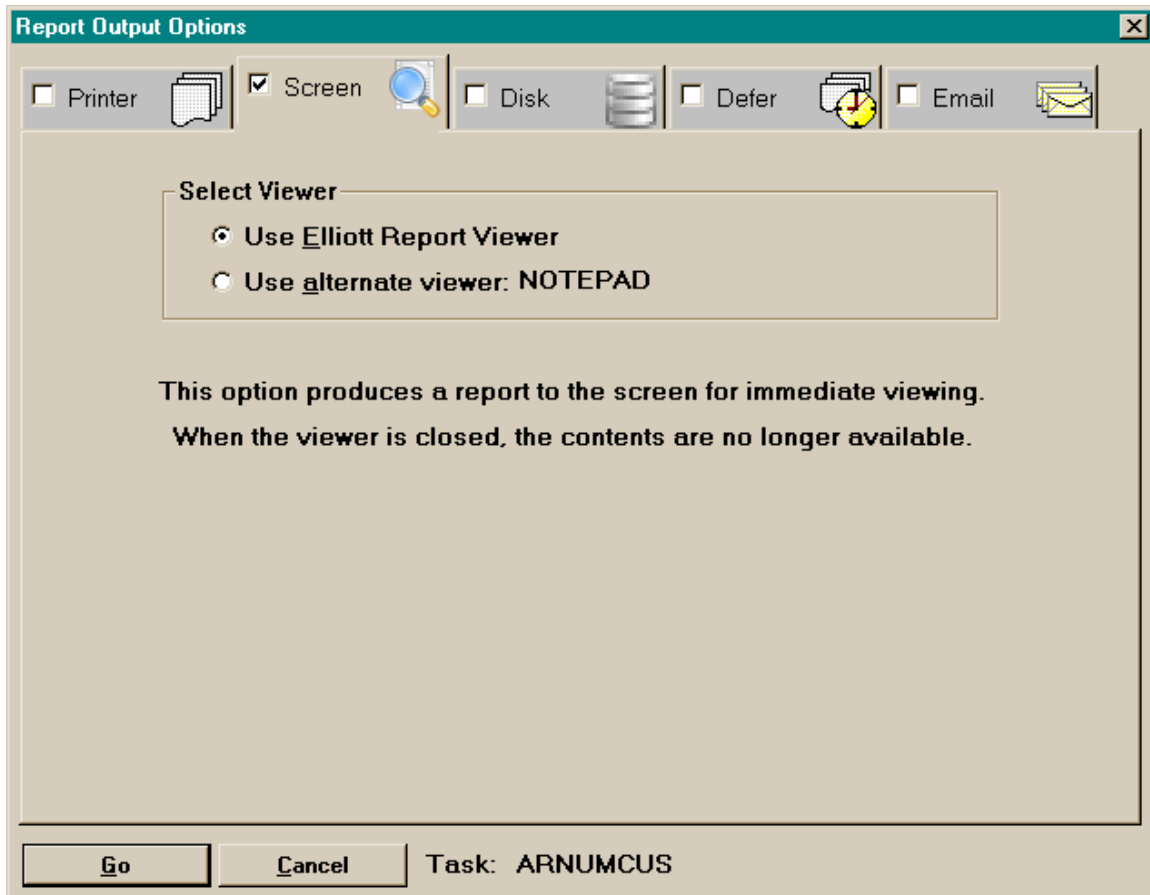
When the checkbox on this tab is checked, the output will go to a report viewer. You may specify one of the following:

- **Elliott Report Viewer:** This program allows for sophisticated viewing of the report and the ability to save it to Spooled Reports, email it or print it using Elliott printing software.
- **An alternate viewer:** The alternate viewing program is the one specified as the *Preferred Editor* on the *Misc.* tab of the *Setup/User Preferences* task, in this case, "NOTEPAD." By default, you should use Elliott Report Viewer to view the report. You should only use the alternate viewer like NOTEPAD if there are issues with using Elliott Report Viewer.

Disk Output

This option sends the report to Spooled Reports for later viewing. For any posting journals, we suggest you send the output to Disk so you can keep a permanent electronic copy for future auditing. The following options can be specified:

- **Description:** You can add some descriptive information to help distinguish this report from others with the same name.
- **Save description for next time:** Check this checkbox to save the above description. Otherwise, the next time it is run, there will be no default description.

Deferred Output

Deferred output now has two flavors: traditional and Run Now:

- **Traditional deferred output:** With this option, enter the following information:
  - **Description:** Information to distinguish this report from others with the same name.
  - **Email completed report:** Check this box if you want the completed report emailed.
  - **Email Options:** Click this button to specify the email options.
  - **Delete after emailing:** This option will delete the report from the Spooled Reports directory after the email is sent.
  - **Starting Date:** Specify the date this report will first run.
  - **Starting Time:** Specify the start time to run this report.
  - **Batch ID:** Specify an identifier for this report.
  - **Recurring Frequency:** Specify how often this report will continue to be processed. If you specify "Once," it will not be run repeatedly. If you specify "Weekly," select the days of the week this report will be processed.
  - **Suspend processing if this report does not run:** Check this box if there are some reports that follow this report that should not be run if this report fails.
- **Run Now:**

Report Output Options ☒

☐ Printer   ☐ Screen   ☐ Disk   ☒ Defer   ☐ Email

☒ **Run Now (Start new process immediately using Deferred Reports processor)**

Description: [   ]

☐ Email completed report   [Email Options...]   ☐ Delete after emailing

Starting Date: 07/14/13

Starting Time: 14:18

Batch ID: RunNow

Recurring Frequency: Once ▾

☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat ☐ Sun

☐ Suspend processing if this report does not run

[Go]   [Cancel]   Task: ARNUMCUS

When you select the *Run Now* checkbox, you are indicating that there is a Deferred Processing server currently running and you are asking this surrogate server to run this report on your behalf. All deferred reports will be spooled to disk. This action frees the user to continue working while the report is processing on the server. The user can request that he/she be sent the report by email when it is completed, and optionally, that it will be deleted after it is emailed.

You may gain significant performance improvement by running Elliott reports on the Deferred Processing server if that machine is also the PSQL server. Network communication is a potential performance bottleneck with running an Elliott report. To avoid this situation, run the Elliott report on the PSQL server, which eliminates the potential network communication bottleneck and could result in significant performance improvement.

In order to take advantage of this function, you must ensure the following:
- In Elliott v8.0 System Configuration, the checkbox "Use Elliott Deferred Processing" must be checked. You may use <root>\Bin\EL800CF.EXE to edit this configuration. If this checkbox is not checked, the defer tab is disabled.
- The defer process <root>\Bin\EL800DP.EXE) is currently running to serve deferred processing tasks, and preferably running on the PSQL

server for best performance. If there is no deferred processing currently running, then when you check the "Run Now" option, you will get the following message:

Run Now Option ✕

ⓘ Run Now option is not available because the Deferred Processor is not running or not responding.

[OK]
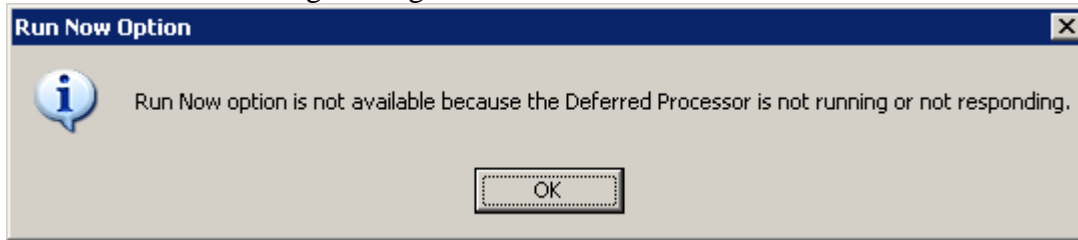
Email Output

When you select Email Output, you must specify the recipients, subject and body text for the email. You may select additional options that will be different, depending on whether you use SMTP (preferred) or MAPI (like V7.5).

- **SMTP version:**
  - o As this example shows, HTML in the body of the email is partially supported. This means you can develop some HTML text using another program, copy and paste it into the message body, and it will be delivered with the formatting specified. Internally, Elliott will consider the body of the email to be HTML if the first character is "<" and "HTML" is found in the first 100 characters. If not, the email will not be considered to be HTML.
  - o **High priority:** Select this option to raise the priority of the email.
  - o **Interact with E-mail client before sending:** This allows you to modify the email after it is prepared but before it is sent.
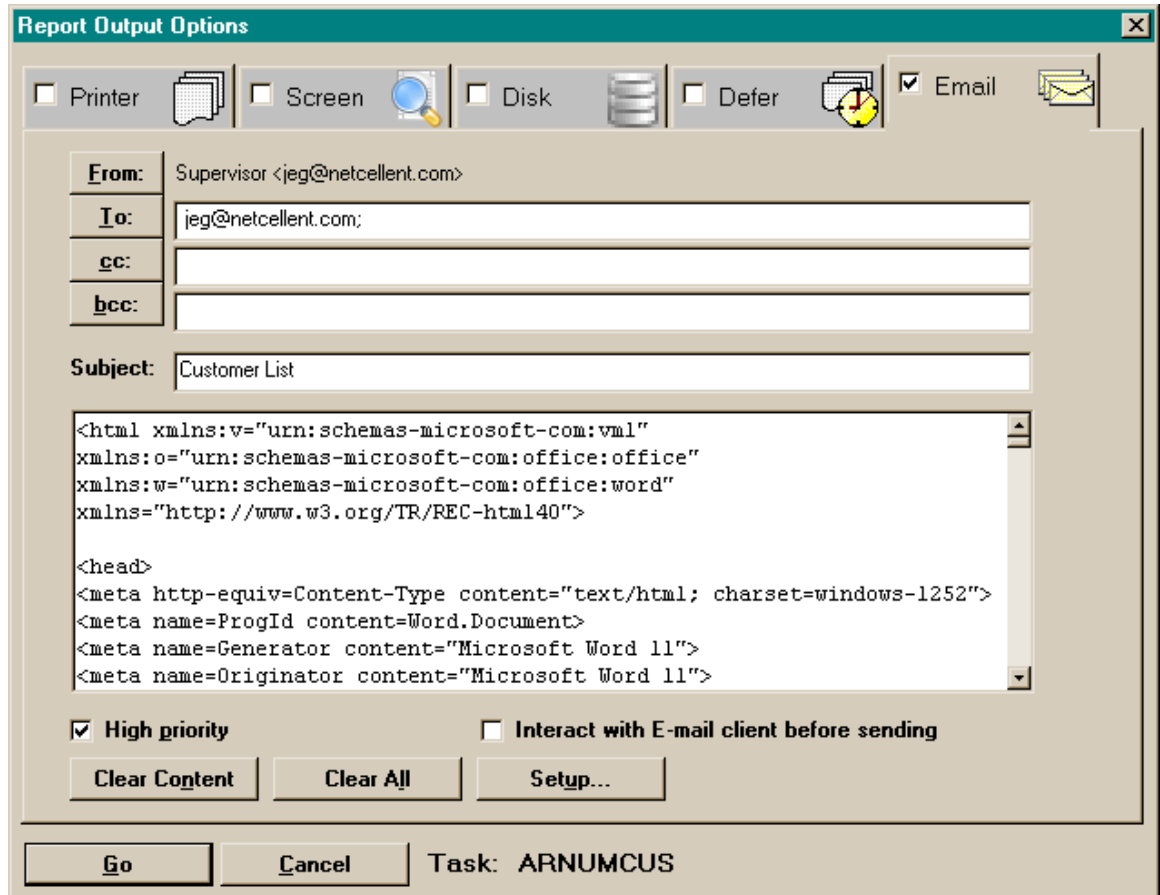
- **MAPI version:**
  - HTML in the body of the email is <u>not</u> supported with MAPI.
  - **Return receipt:** Asks for a return receipt from the recipient's email system.
  - **Interact with E-mail client before sending:** This allows you to modify the email after it is prepared but before it is sent.
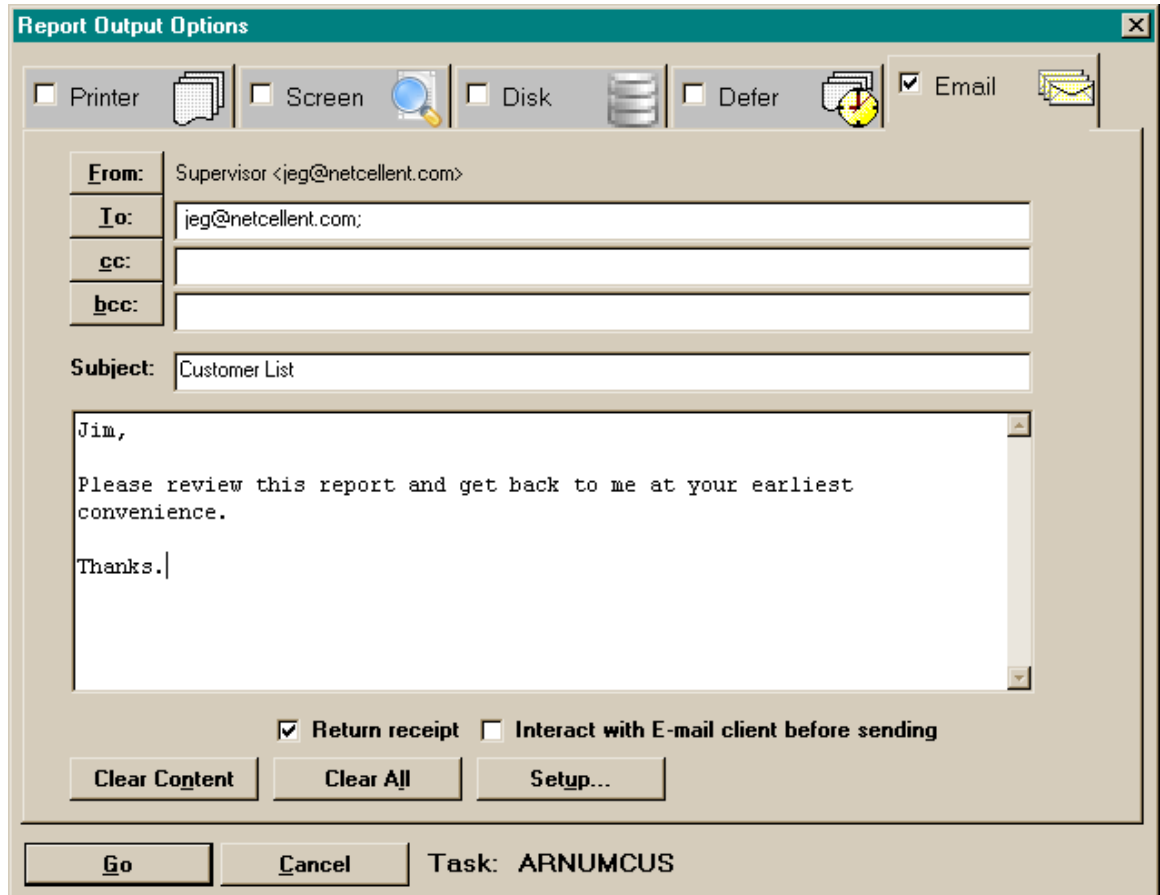
Spooled Reports Manager

Spooled Reports has a new architecture and user interface that makes managing spooled reports much easier. Here is a list of key features in v8.0 Spooled Reports Manager:

- Because of the new file-naming and cataloging conventions, you will never run into the 99 spooled reports limitation that is in 7.x. This eliminates the need for archiving spooled reports periodically.
- V8 spooled reports do not require a cataloging database. Therefore, you could manage the V8 spooled reports in the Reports subfolders through Windows Explorer. If you received a spooled report in an e-mail, you could save that report in the proper Reports subfolder and it would show up in the Spooled Reports manager.
- A new, Office-like Spooled Reports Manager program includes easy access to the reports of all authorized companies and modules from a single screen. The list of reports easily can be grouped, sorted and filtered to help find the desired reports. A drag-and-drop interface allows for easily moving reports among folders.
- V7.x spooled and archived reports are also available through this interface, and, optionally, they can be converted into the new architecture.
- By default, spooled reports are stored in secured, compressed, .Zip file format, reducing storage requirements by 80% or more and protecting the content of

reports from external viewing. The Zip reports are encrypted with a secured password so other users can't view the report content even if they have all NTFS security rights to the Reports subfolders.

- The Deleted folder allows deleted reports to be recovered easily.

The Spooled Reports Manager looks like this:
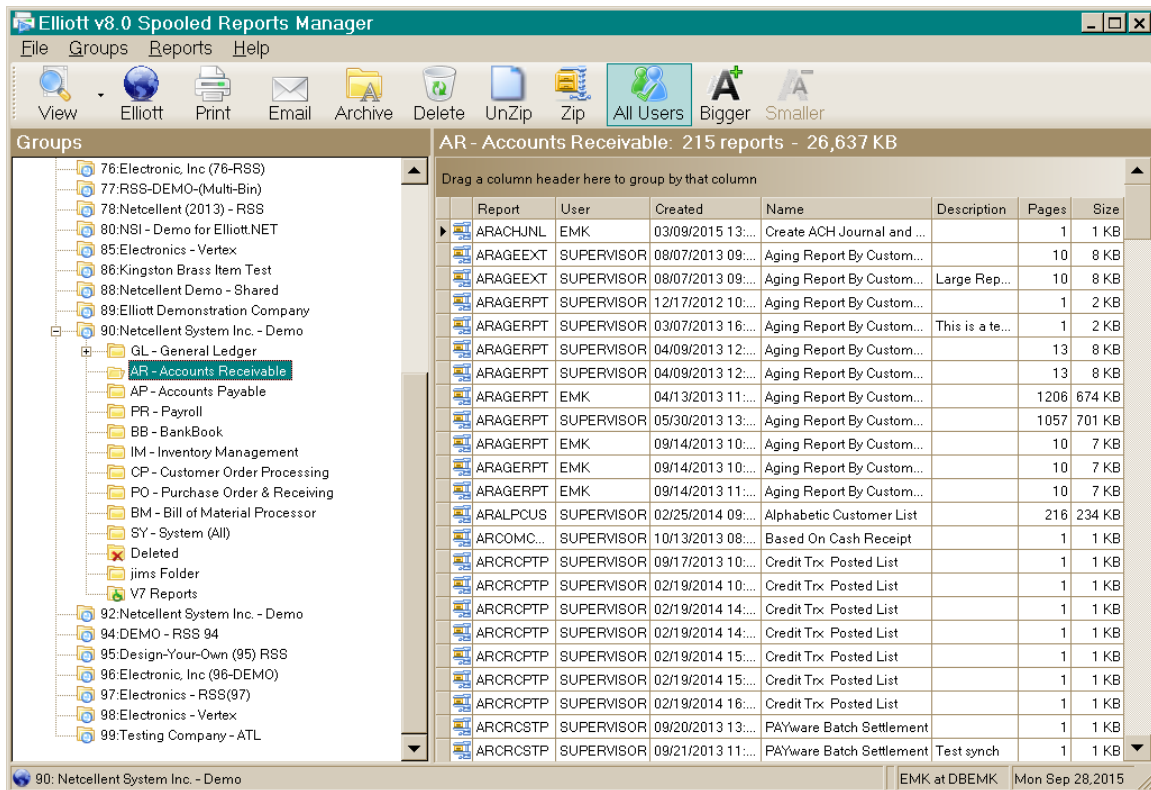
Across the top is a toolbar with buttons that are used mostly to operate on the selected reports.

Down the left side under the toolbar is a treeview of available companies and, within company, available modules and additional folders where reports are stored.

The right side of the screen, below the toolbar, is a list of reports that correspond to the selected treeview node. The report list is organized in a grid where you can group, sort and filter the list to help you find the reports you are looking for.

You may change the size and location of your Spooled Reports Manager window, and it will be remembered the next time you start the program. Similarly, you can adjust the relative width of the treeview and grid portions of the screen, and that will be remembered as well. Also, any grouping, sorting and filtering in the grid will be saved.

Toolbar Functions

- **View:** After selecting one or more reports, press this button to view them. If you click on the down arrow portion of the button first, you can choose between the Elliott Report Viewer and the alternate Elliott Editor. Once you choose a viewer this way, any viewing will be done by the selected viewer until you change it here again.
- **Elliott:** Use this button (or press F9) to go to the next Elliott process.
- **Print:** Select one or more reports and press this button to use the Elliott printing software to print the reports.
- **Email:** Email the selected reports by pressing this button.
- **Archive:** When you press this button, you are informed that archiving is done with drag-and-drop. To archive some reports, select them and drag them to a folder in the treeview that was previously created for archiving purposes.
- **Delete:** This will delete the selected reports by moving them to the special "Deleted" folder under the current company. *Note: If you delete them from the "Deleted" folder, they will be physically deleted.*
- **Unzip:** By default, reports are "Zipped" into a compressed format. If you need to decompress them, or "Unzip" them, this button will do that to the selected reports. You may need to unzip a report when you share it with another person, Keep in mind that when you unzip a report, the report itself is no longer secure other than the possible NTFS security on the folder. Even though you could leave the report in Unzipped format, we always suggest that you zip it again later to make it secure and save disk space.
- **Zip:** You may select some uncompressed reports and use this button to compress them and make them secure. This is especially useful after converting V7.5 reports to this new V8.0 architecture. This option is not available for V7.5 reports.
- **All Users:** If you have access to the spooled reports of others, as defined in *Password Setup / Global Security / User Global Security / Screen 1/ Item 2*, you will see this button on the toolbar. Press it to toggle between all reports and just your reports. If you have this authority, you also have authority to the functions below marked "restricted." Keep in mind that you are still subject to NTFS security on the Reports folder. If you do not have sufficient NTFS right to the Reports folder, then even though you may be able see other users' spooled reports in the list, you still may not be able to see the content. Discuss with your IT person the proper settings of NTFS security on the Reports folder.
- **Bigger:** Use this button to make the icons and fonts bigger.
- **Smaller:** Use this button to make the icons and fonts smaller.

Groups

The Groups area contains a hierarchical treeview that allows you to look at specific groups of reports.

- **Top node (Elliott Business Software):** This node serves as the parent to the company nodes.
- **Company nodes:** When you click on a company node, the list of modules and other folders you can use in that company is made available, if it isn't already

(you will see a small "+" sign to the left of the company name when it is available). Further, you can right click on a company node to select one of the following options:

- o **Add Folder (restricted):** Select this option to create a new folder to which you can move reports from other modules and folders. You might, for example, create a new archive folder if you want to separate out older reports from current reports. Folders created at this level will result in actual file system directories located at <root>\Reports\<company>.
- o **Add Link to Folder (restricted):** This option can be used to specify a folder outside the <root>\Reports\<company> directory structure where V8.0 reports can be found.
- o **Add Link to V7 Folder (restricted):** This option will specify a folder outside the <root>\Reports\<company> directory structure where V7.5 reports reside. Elliott V7.5 reports in the specified directory can be listed and processed just like V8.0 report files.

- **Module nodes (e.g., GL – General Ledger):** These nodes directly map to the <root>\Reports\<company>\<module> structure and automatically are listed in the treeview when the user has authority to access these modules. They are the first nodes following a company node. The *SY – System (All)* node lists all reports in all module nodes. Additionally, the following option is available when right clicking on a module node:
  - o **Add Folder (restricted):** You can use this option to create a folder directly under the module folder. Then, you can drag reports from other folders into this folder.
- **Deleted:** When you delete a report from another folder, it is not physically deleted. Instead, it is moved to this folder. You may move it back to another folder later if desired. But if you delete a report from this folder, it will be physically deleted and not recoverable at a future time.
- **Added reports nodes:** When you add a folder from the company node, it will be listed after the Deleted folder. No reports go here automatically – someone has to move them here. These folders will have the following options when right clicked:
  - o **Rename (restricted):** Rename the folder.
  - o **Delete (restricted):** Delete this folder.
  - o **Add Folder (restricted):** Add another folder under this folder.
- **V7 Reports:** This folder automatically is available. It maps to the <root>\Data or <root>\DATA_<company> folder, where V7.5 reports can be found. The report files in this folder are listed and can be processed just like V8.0 reports. There are additional options when this node is right clicked:
  - o **Show Subfolders with No Reports (restricted):** By default, subfolders to the DATA or DATA_<company> folder without any report files in them will not be shown. If you select this option, those folders will be shown even though they contain no report files.
  - o **Convert to V8 Reports (restricted):** If you select this option, the V7 report files in the DATA or DATA_<company> directory will be

converted to V8 format and moved to the appropriate module folder. That means they no longer will be available in V7.5 Spooled Reports.

- **Link to V7 Folder nodes:** This kind of node has as its name the file system directory name where V7.5 reports can be found. These link nodes are not automatic – they must be created by a user. If you right click on this kind of node, you will have the following options:
    - o **Show Subfolders with No Reports (restricted):** If you select this option, subfolders that have no V7.5 report files will be shown.
    - o **Remove Link (restricted):** Remove this link from the treeview.
- **Link to Folder nodes:** The name of this kind of node is the file system directory where V8.0 reports can be found. These link nodes are not automatic – they must be added by a user. If you right click on this kind of node, you will have the following options:
    - o **Add Folder (restricted):** You may create a file system folder here for potentially holding V8.0 reports. These folders will have the following options when right clicked:
        - ▪ **Rename:** Rename the folder.
        - ▪ **Delete:** Delete this folder.
        - ▪ **Add Folder:** Add another folder under this one.
    - o **Remove Link (restricted):** Remove this link from the treeview.

Reports List

This part of the screen, on the right-hand side below the toolbar, contains a powerful grid that lists the reports that correspond to the selected treeview node. Each report is preceded by an icon that lets you know its status:

- This is a compressed report file.
- This is an uncompressed report file.
- This is a compressed report file whose name has been tampered with and is not available for processing.

When you right click on a report, you will see a list of choices that correspond to the toolbar buttons. If a particular choice is not available, it will be grayed out.

Grouping Reports

You may drag a column header into the space above the column header to group the reports by that column. For example, if you drag the *Created* column to that space, you will see the list grouped by the date the reports were created. Initially, you will see only the groups and a count, but you can click on the "+" to the left of any group to view the reports within that group (as we did here for 5/13/2013) :
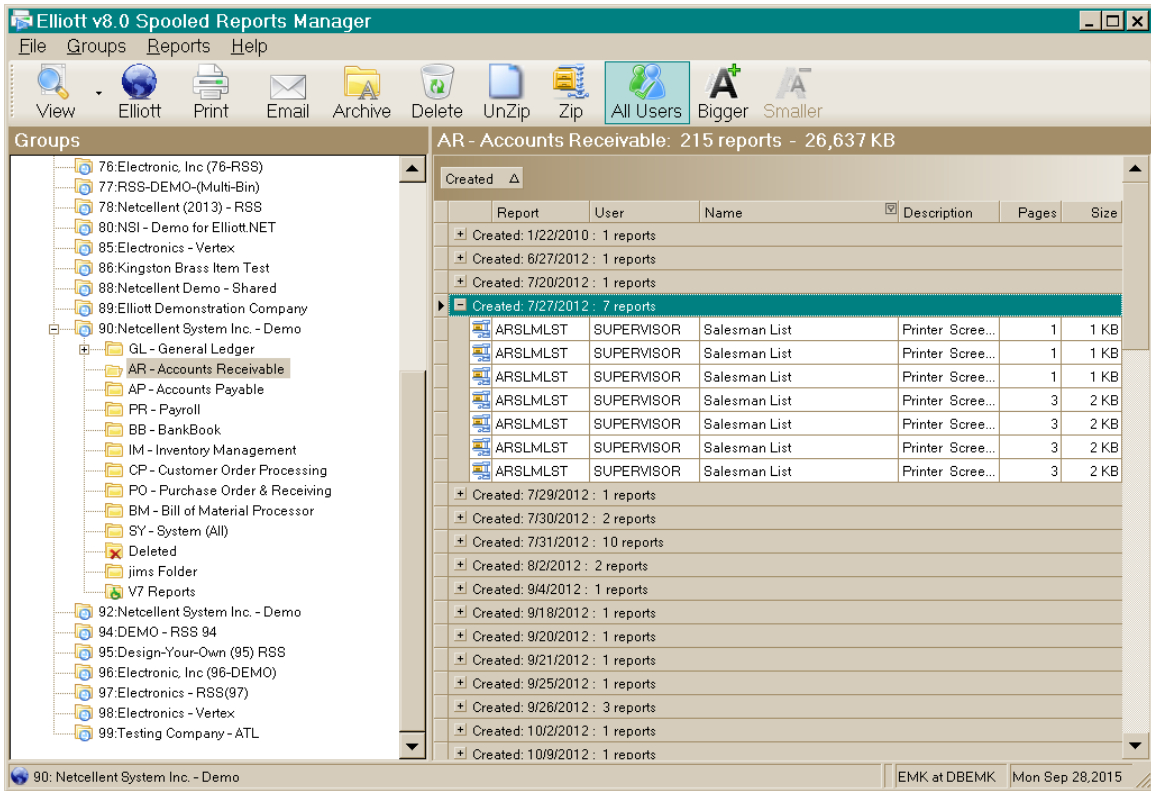
You can drag multiple column headers to the grouping space. In the screen below, we first dragged *User* to the grouping space, then *Report* under *User*. That created the screen below. Notice that there are two levels in the list that correspond to the two levels in the group area (e.g., EMK has run 17 different reports, and the second *Report* group under EMK is expanded to show the 4 reports in that group):
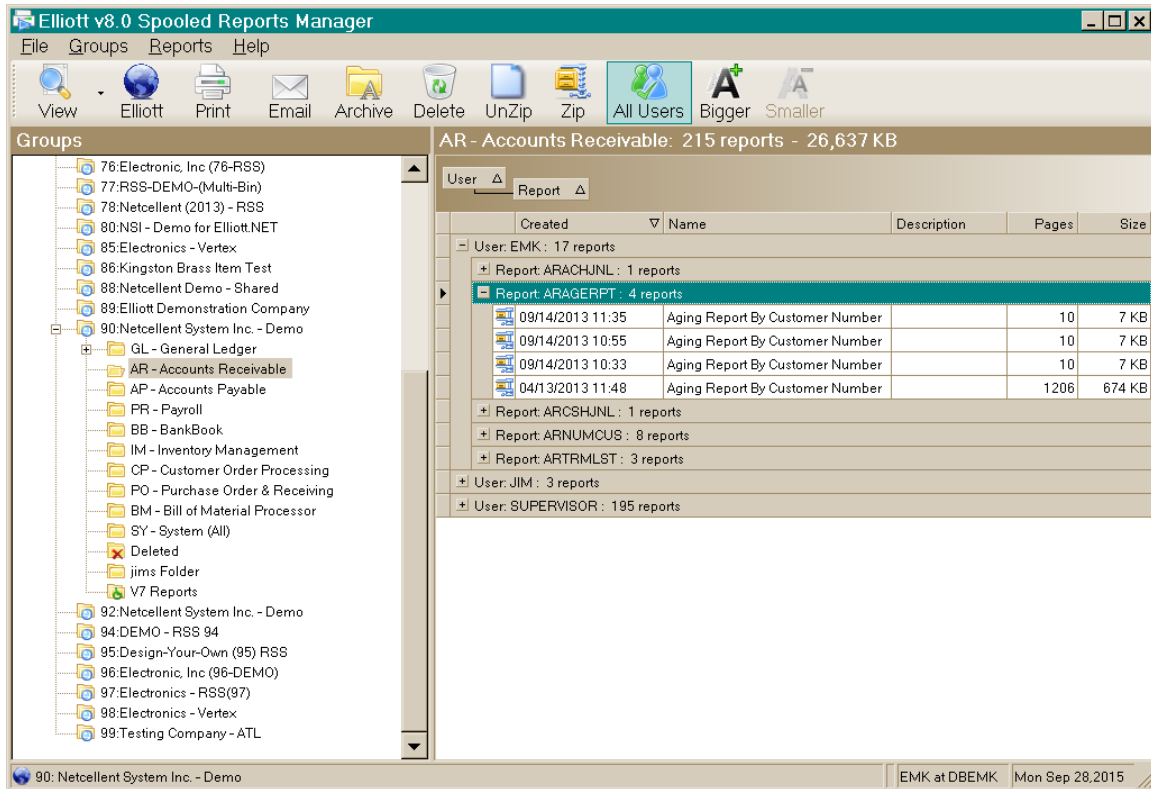
Sorting Reports

Grouping is a special form of sorting, but you may also sort by any column simply by clicking on the column header. If you click again on the same column header, the sort sequence will be reversed. Even when grouping, you can change the sort order of the groups by clicking on the background of the group or changing the sort within group by clicking on a column header   The sort order of the groups and columns is indicated by a triangle, either with the point at the top to indicate increasing order, or with the point at the bottom to indicate decreasing order. In the screen above, the reports are sorted first by User (ascending), then by Report (ascending), then by Created (descending).

Filtering Reports

Another powerful feature of this reports grid is the built-in filtering capabilities. If you hover the mouse over a column header, a small graphic appears on the right end of the column header. If you click on this filter graphic, it will show you a list of unique values in the column (as we did for the *Report* column below):
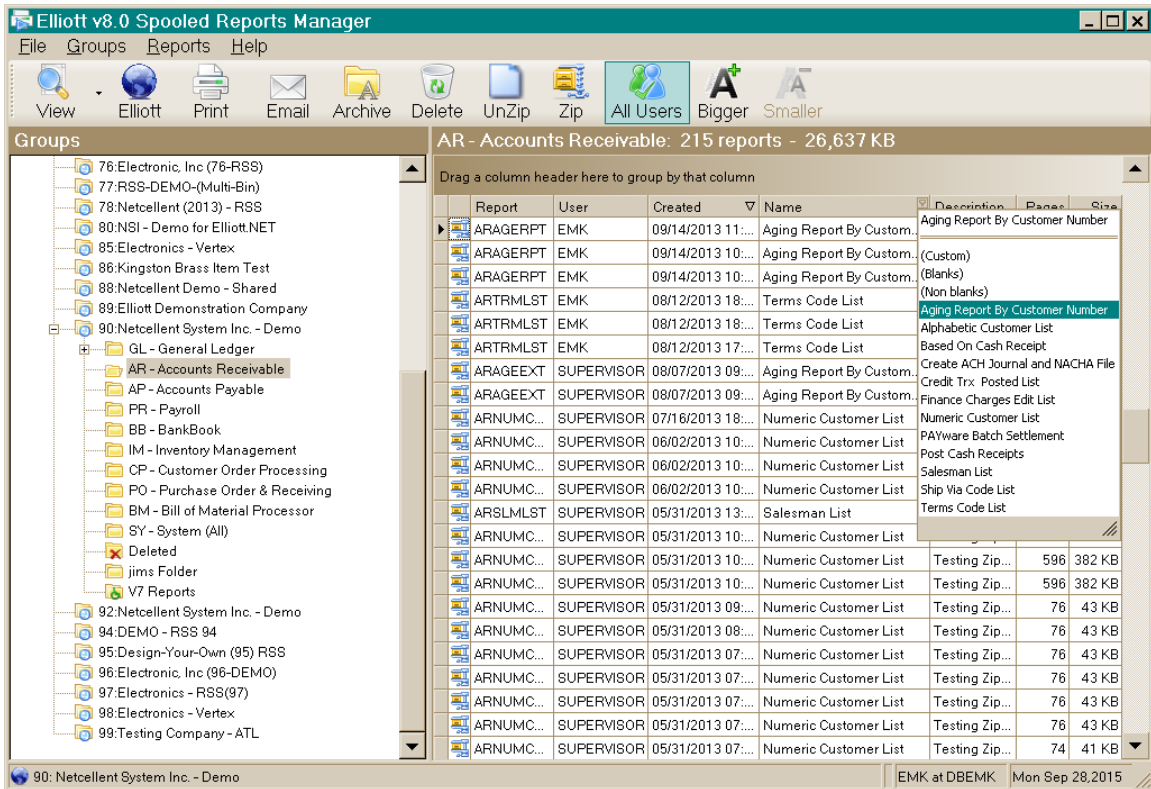
If you highlight a value (as we did above), and press *Enter*, the list will be shortened to only show the matching reports:
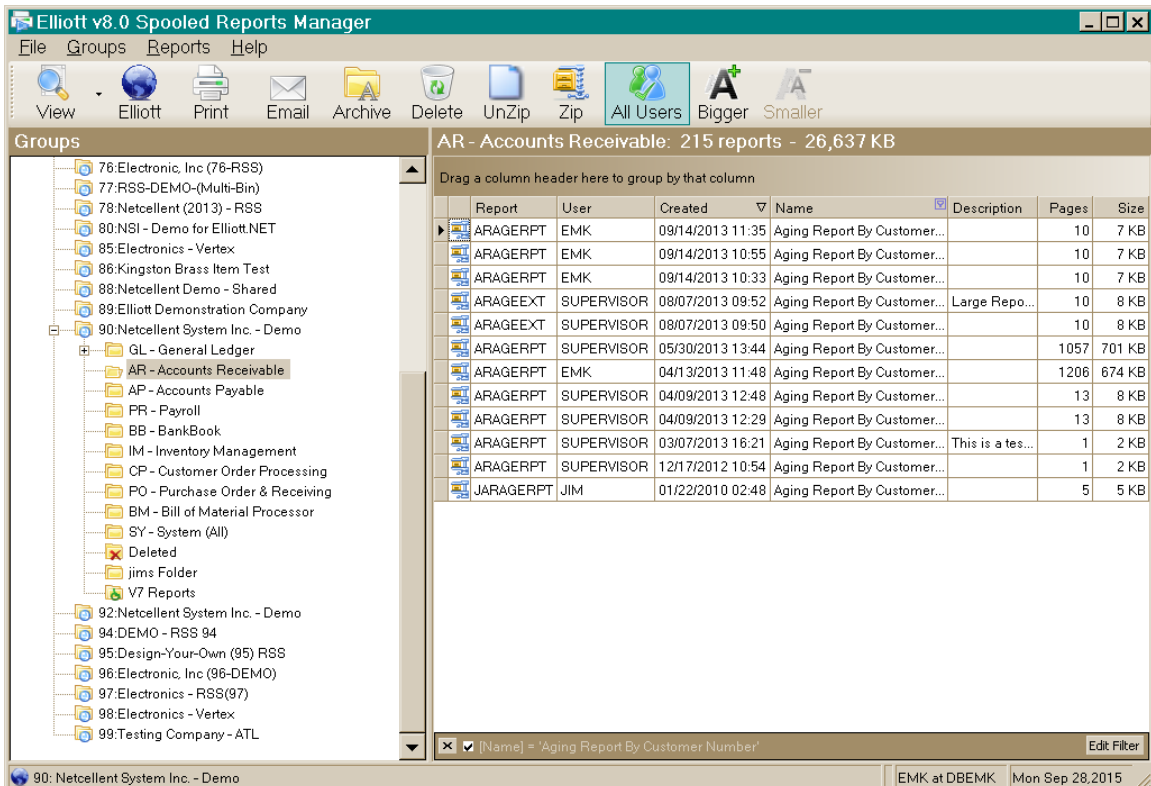
Notice also the new filter area at the bottom of the reports list. This shows you what filtering criteria were used to display the list. You can remove the filter by clicking on the *X* button at the left edge of the filter area, and the list will reappear without any filters. Or, you could uncheck the checkbox to the right of the *X* button to remove the filter but keep it available for later use. You may also add additional filters of this type and use them together or separately. You may also use the *Edit Filter* button on the right side of the filter area to create a more complex filtering:
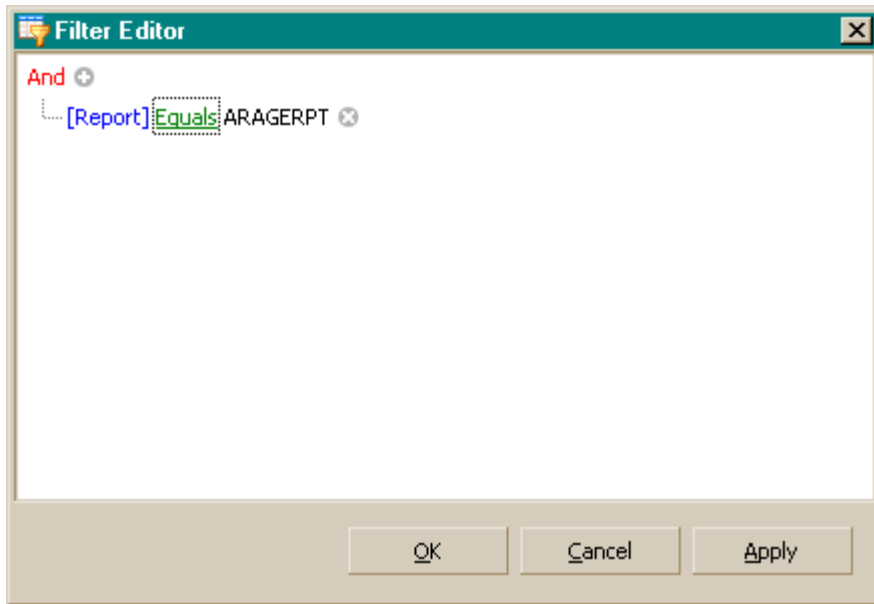
Clicking on different colored parts of the filter text in this dialog gives you a wide variety of options to help you find just what you are looking for.

Flexibility, Power and Convenience

In addition to the grouping, sorting and filtering mentioned above, you may also rearrange the columns and adjust the column sizes.

Any grouping, sorting, filtering or rearranging of the reports list is saved when you exit the Spooled Reports Manager and is applied when you next use it.

Security

When a spooled report is created, it automatically is compressed into a password-protected .Zip file. From outside Elliott, it is not possible to view the contents of the report without knowing the password. The password for decompressing this file is maintained internally by Elliott. Only by passing the Elliott Login and subject to the menu restrictions of Elliott can users run the Spooled Reports Manager to view, email, print, etc., these reports.

Archiving

Due to the flexible directory structure and file naming conventions of spooled reports in Elliott V8.0, you never have to archive older reports. However, you may wish to do so, just to keep the list of available reports to a manageable size.

To archive some reports, do the following:
- Create a directory where the reports will exist.
    - You can use the Spooled Reports Manager to create an archive folder and, if desired, subfolder. For example, right click on a Company node and select *Add Folder*, or right click on a module node or other node and add a folder and perhaps subfolders there.
    - You also can use the file system to create a folder in some other location to house your archived files. In that case, after creating the archive folder, right click on a Company node and select *Add Link to Folder*. That is how to make the Spooled Reports Manager aware of the external archive folder.
- Drag reports from various folders and drop them in the newly created archive folder.
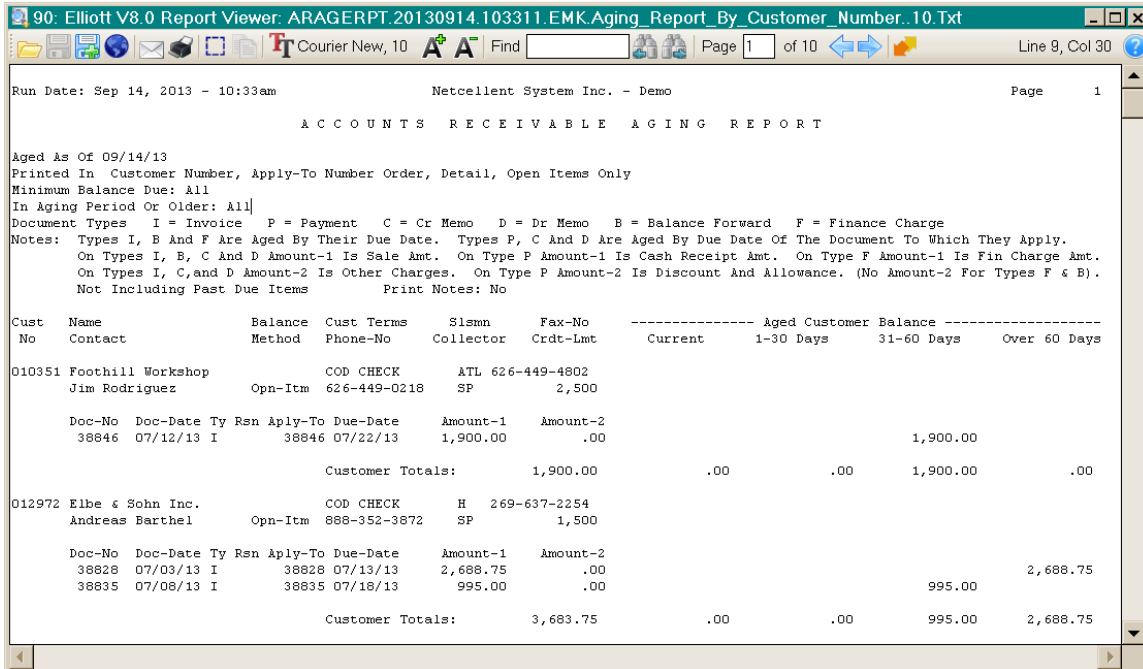
Report Viewer

Overview

Elliott Report Viewer is a Notepad-like program for viewing Elliott report files while providing additional Elliott functionality. Using Report Viewer, you can:
- Email the report
- Print the report
- Save the report to Spooled Reports

By design, there is no ability to edit these files – this tool is for viewing files only.

```
Courier New, 10    A⁺ A⁻   Find [          ]   Page [1]  of 10   ⇦ ⇨       Line 9, Col 30
```

```
Run Date: Sep 14, 2013 - 10:33am              Netcellent System Inc. - Demo                           Page     1

                                A C C O U N T S   R E C E I V A B L E   A G I N G   R E P O R T


Aged As Of 09/14/13
Printed In  Customer Number, Apply-To Number Order, Detail, Open Items Only
Minimum Balance Due: All
In Aging Period Or Older: All
Document Types   I = Invoice    P = Payment   C = Cr Memo   D = Dr Memo   B = Balance Forward   F = Finance Charge
Notes:  Types I, B And F Are Aged By Their Due Date.  Types P, C And D Are Aged By Due Date Of The Document To Which They Apply.
        On Types I, B, C And D Amount-1 Is Sale Amt.  On Type P Amount-1 Is Cash Receipt Amt.  On Type F Amount-1 Is Fin Charge Amt.
        On Types I, C,and D Amount-2 Is Other Charges.  On Type P Amount-2 Is Discount And Allowance. (No Amount-2 For Types F & B).
        Not Including Past Due Items          Print Notes: No

Cust  Name                        Balance  Cust Terms    Slsmn      Fax-No     -------------- Aged Customer Balance ------------------
 No   Contact                     Method   Phone-No      Collector  Crdt-Lmt      Current      1-30 Days      31-60 Days    Over 60 Days

010351 Foothill Workshop                   COD CHECK        ATL 626-449-4802
       Jim Rodriguez             Opn-Itm 626-449-0218    SP        2,500

       Doc-No  Doc-Date Ty Rsn Aply-To Due-Date    Amount-1    Amount-2
       38846   07/12/13 I       38846  07/22/13    1,900.00        .00                                         1,900.00

                                  Customer Totals:           1,900.00         .00          .00      1,900.00          .00

012972 Elbe & Sohn Inc.                    COD CHECK        H  269-637-2254
       Andreas Barthel           Opn-Itm 888-352-3872    SP        1,500

       Doc-No  Doc-Date Ty Rsn Aply-To Due-Date    Amount-1    Amount-2
       38828   07/03/13 I       38828  07/13/13    2,688.75        .00                                                        2,688.75
       38835   07/08/13 I       38835  07/18/13      995.00        .00                                          995.00

                                  Customer Totals:           3,683.75         .00          .00        995.00     2,688.75
```

Keyboard Shortcuts

Use the following keystrokes in addition to normal text-editing keystrokes:

Keystroke	Action
Ctrl+O	Open new file…
Ctrl+S	Save to Spooled Reports
Ctrl+P	Print
Ctrl+C	Copy to clipboard
Ctrl+Minus	Decrease font size and make window smaller
Ctrl+Plus	Increase font size and make window bigger
Ctrl+F	Initiates Find dialog to locate a string of text in the report
Ctrl+G	Initiate the Go to page dialog to specify the desired page
Ctrl+PageUp	Position to the top of the previous page
Ctrl+PageDown	Position to the top of the next page
Shift-F1	Help

ToolBar Actions

Open File… (Ctrl+O)
This provides a standard File Open dialog you can use to view a different report from the current one.

Save to Spooled Reports (Ctrl+S)
If this program was launched from running a report to the screen in Elliott, you can use this option to save the report in the spooled reports folder. If this program was not

launched from the print-to-screen option in Elliott, this ToolBar button will not be displayed.

Save As…
This provides a standard File Save dialog you can use to save the current report to a new location.

Go to next Elliott process: Press this button or F9 to go to the next open Elliott process on your computer.

Email…
This provides the ability to email the report, using Elliott email functionality.

Print… (Ctrl+P)
This provides the ability to use the Elliott printing function to print the report to one or more specified printers.

Mark a rectangle to copy
After you click this button, you can use your left mouse button to draw a rectangle on the screen. When you release the mouse button after drawing the rectangle, you can copy the contents of the rectangle to the clipboard. Note: You can also use the right mouse button to do the same thing without clicking this button.

Copy to Clipboard (Ctrl+C)
If some characters are highlighted in the text area, or you have drawn a rectangle around some text, you can use this button to copy the specified text to the clipboard for use in another program.

Change font…
Click on this area to start a standard Font dialog to change the font of the report on the screen. Only fixed-pitch (non-proportional) fonts will be shown. After you select a font, the screen will be resized to attempt to fit the width of the report.

Increase font size (Ctrl+B)
Click this button to use the next bigger point size in the current font family.

Decrease font size (Ctrl+S)
Click this button to use the next smaller point size in the current font family.

Find text (Ctrl+F)
Type a string you wish to find in the report.
- Press the *Enter* key, or press the *Find next* button, to find the next occurrence of the string.
- Press the *Shift+Enter* key, or press the *Find previous* button, to find the previous occurrence of the string.

Go to Page (Ctrl+G)
Type a page number and press the *Enter* key to go to that page in the report.

Previous page (Ctrl+PageUp)
Press this button to go to the top of the previous page.

Next Page (Ctrl+PageDown)
Press this button to go to the top of the next page.

Help (Shift-F1)
This displays the help document for Spooled Reports Manager.

Screen Location, Size and Font

When a file is opened, the program will try to use an optimal window size as follows:
1. If the column width of this report matches approximately the width of a previously viewed report, the previous font and window height, width and location will be used.
2. If there is no approximate match to a previously viewed file, the program will make an educated guess at the necessary width and height for best viewing of the report, using a standard font.

If you adjust the size or location of this program's window, or change the font, that information will be saved for potential matching to future reports of the same approximate width.

Drill Down Improvements

Notes, eContacts and Attributes

In Elliott V8.0, wherever you drill down to a specific Note, eContact or Attribute, a separate process will be launched for you to view or edit this object. At the same time, because we are launching a new process, you can select multiple Notes, eContacts or Attributes and launch them simultaneously. This provides more flexibility to compare similar objects and copy-and-paste among them. One side effect of this capability is, for example, when you add a new note -- because you are adding it in a separate process -- the System does not know when you are done. As a result, after adding the note, that note is not reflected in the Note list immediately. You will need to press F5, or exit the note list and come back up again, for that list to refresh.

Legacy Screen Drilldowns

In Elliott V7.5, it was sometimes possible to drill down repeatedly until you reached a point where the drill downs could go no further. In Elliott V8.0, limitations on drilling down from one level of information to another have been removed. Now, you no longer will be stopped when you want to drill down to a screen that has already been drilled down to. Where a drill down would cause a recursion error, Elliott will automatically start the drill down in a new process. Optionally, pressing the *Control* key with the drill

down key in many Legacy Screens also will launch a new process. This is especially useful for side-by-side comparisons. For example, in the stock status inquiry screen, after bringing up an item, you will notice that you can use the "F3" key to drill down to the "ATP Inquiry Screen." Now you have two options when you press the F3 key:

- F3 will drill down to the ATP Inquiry in the current window.
- Ctl-F3 will start a new window for the ATP Inquiry

The biggest advantage of the new Control + Key capability is that it allows you to drill down to a window and make it an independent window. This allows you to drill down to multiple windows and compare the information side by side.

Not all potential drill down areas are supported with the Control key combination. If you feel a particular drill down area needs the Control key combination support, you may give us feedback.

```
90: Stock Status Inquiry - [Netcellent System Inc. - Demo]        _ □ ✕
Elliott Business Software V8.05.928

Stock Status Inquiry

        1. Item No            1003-9264-1001    Verifone MX800 Series Cable
           Unit Price             44.7800 EA   2 Meters/Green/Ethernet/USB
           User Def Code
           YTD Qty Usage                 .00      .00 % of Last Yr Qty Usage
           YTD Qty Usage + ATP          7.00   999.99 % of Last Yr Qty Usage
           Last Yr Qty Usage            .00      .00 % of Yr Bf Lst Yr Usage
           Yr Bf Lst Yr Usage           .00             Weight  0.000
        2. Location         All Locations
 Loc   Qty On Hand   Allocated  Qty On Ord   Qty On BO    Available     Bin No
  LA        6.00       27.00         .00        1.00        21.00-
  AT        1.00         .00         .00         .00         1.00




 TOTAL:     7.00       27.00         .00        1.00        20.00-
 PgUp PgDn   F1=Subs Item Srch   F2=Comp Avail   F3=ATP Inquire Enter=History
 F4=Aging Report   F5=Trx Detail    ESC=Exit
```
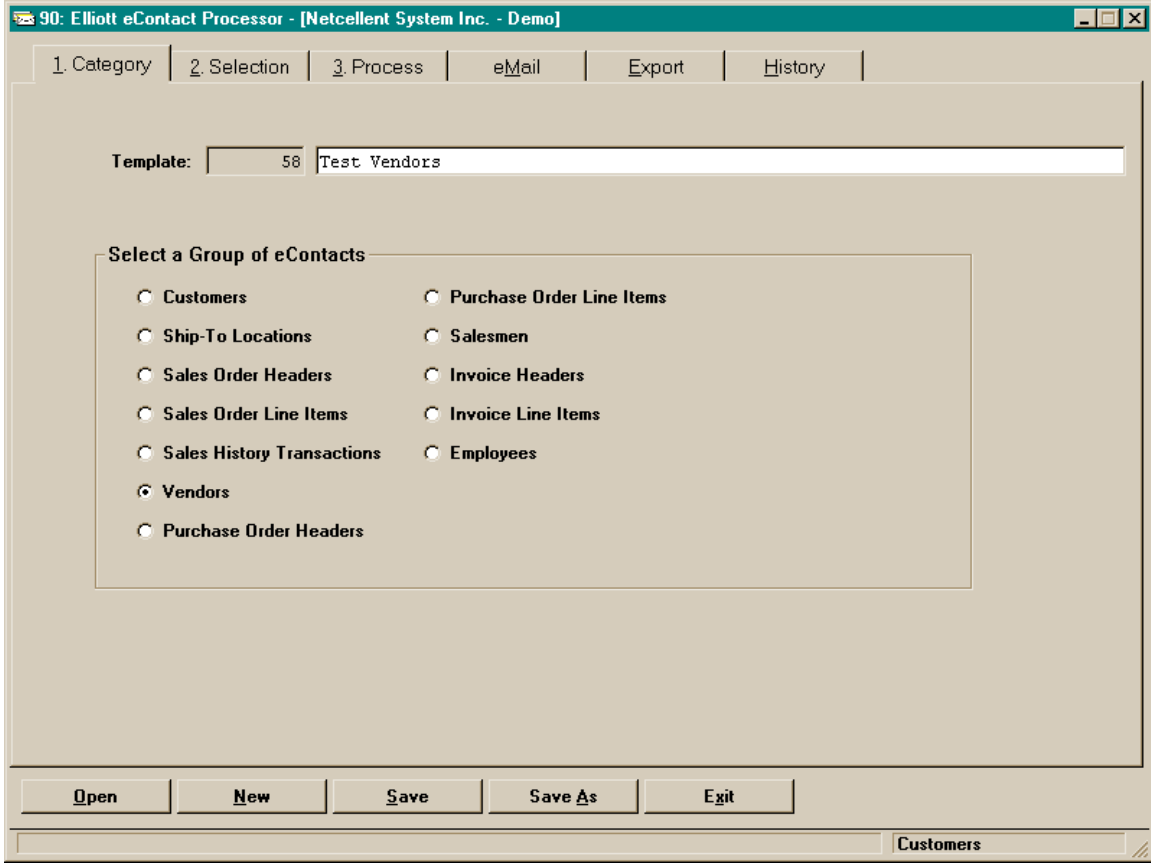
eContacts Processor

This program, also known as Mass Email, has been redesigned to make the user interface more intuitive. It is now template-centric, with the expected *Open, Save* and *Save As…* functionality at the bottom:

Open will display the list of templates for you to use as a starting point. After making changes, you can *Save* the template or use *Save As...* to save your work to a new template.
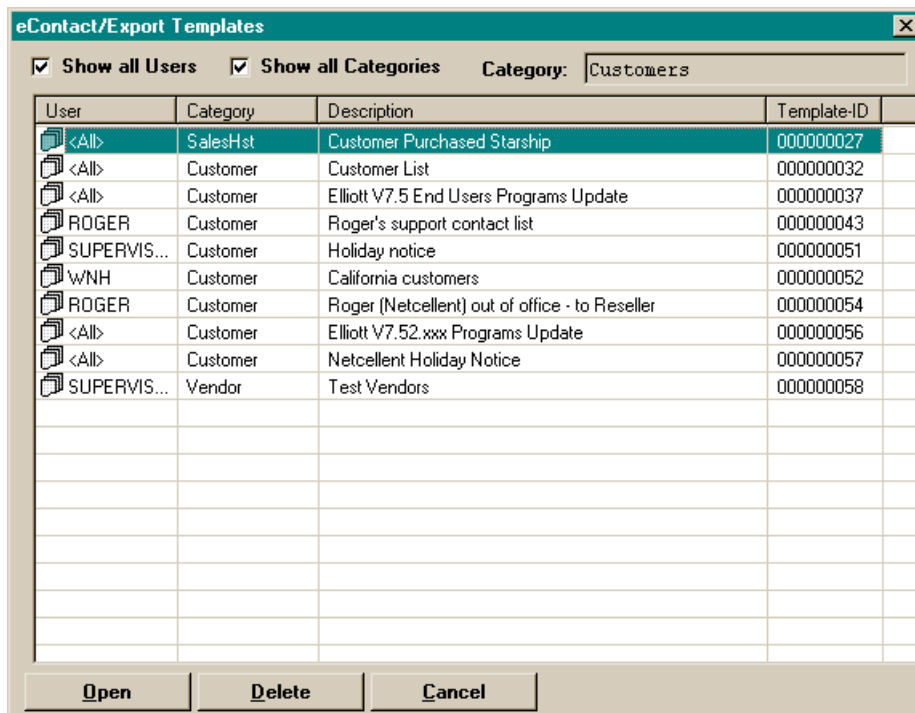
In addition, the Email From name and address can be customized with Elliott variables to provide more personalized email (see below). When using SMTP for email, HTML can be pasted into the body of the message, allowing richer email content for your customers. Also, when using SMTP, you have the option to send a blind carbon copy of the email to yourself.
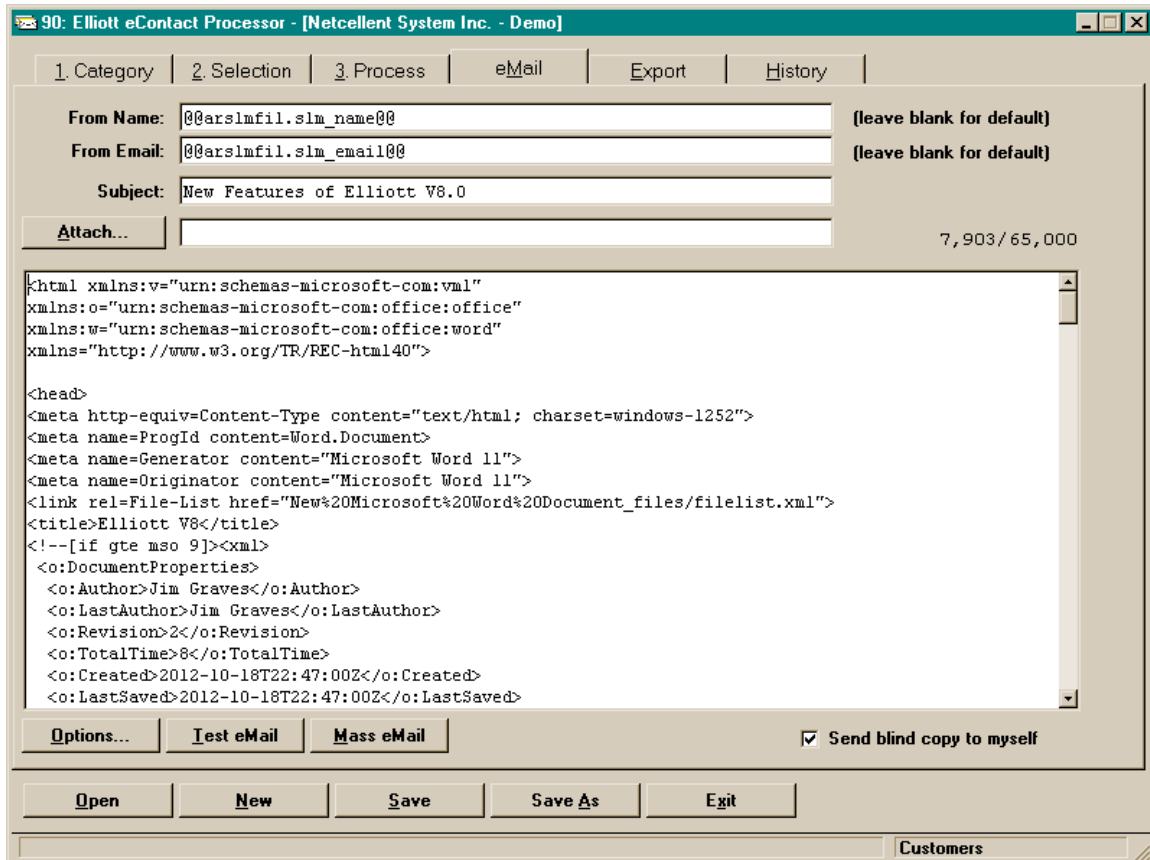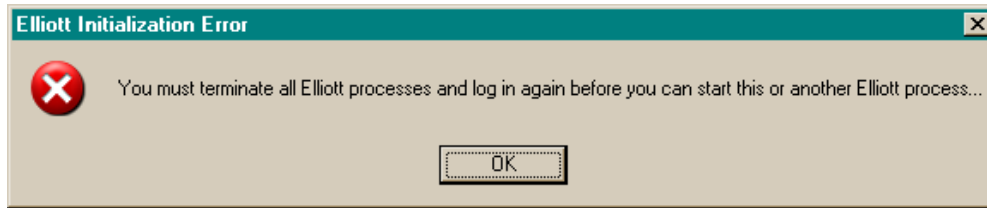

Macros in V8.0

External macros, where other programs like Notepad can be controlled from within Elliott, are not different between V7.5 and V8.0.

Internal macros, where Elliott can be controlled from the command line or from an external file of Elliott command strings, operate nearly the same as in V7.5, but with two important differences:

- The Elliott Control Center must be running before starting an internal macro. If you see a message like the following after launching an internal macro, you need to login to the Control Center and try again:

Elliott Initialization Error

You must terminate all Elliott processes and log in again before you can start this or another Elliott process...

OK

- The name of the process to start on the command line has changed from EL700 to EL800P. Note the letter "P" in EL800P. You would do this from <root>\Bin folder. An example follows:

  ```
  EL800P /CO:01 02 /F:CUSNLIST
  ```

  The above example starts the internal macro located in the file <root>\Macro\CUSNLIST.MAC . It specifies company 01 and will run in Accounts Receivable (02).

Other Elliott Executables

Below are additional executables that you may start from the command line to do specific Elliott V8.0 functions. They are located in the <root>\Bin directory.

- **EL800P.Exe:** This program is used internally to start a task from the Control Center. It also may be started to run an internal macro (see *Macros in V8.0*, above).
- **DDF2BTR.Exe:** This program can be used to make sure the internal definitions of selected PSQL database files match the DDF definitions to ensure the database is ODBC compatible. By default, it will only rebuild any Btrieve files whose DDF definitions are mismatched with the file index structure, but you can force the rebuild by using the /F option. If you simply type the executable name on the command line without any parameters, you will see the following information to help you understand how to operate this utility:

DDF2BTR Information

DDF2BTR does the following for each qualifying file:
1. Opens the file exclusively.
2. Creates a new *.BTO file using the DDF definitions. If the .BTO file exists, it will be overridden.
3. Reads each record in the old file and writes it to the new file.
4. Deletes the old file.
5. Renames the new file to the old file name.

The net result is a Btrieve file whose indexes reflect the DDF definitions instead of the COBOL definitions.

Usage:

DDF2BTR /Y /F <filespec> <ddfpath>

     /Y = Batch mode; no interaction (optional)
     /F = Force processing even if the DDFs
               and file indexes match (optional)
  <filespec> = a group of Btrieve files that may
                    include wildcards
  <ddfpath> = the directory where the DDF files
                    can be found. If not specified,
                    the path from <filespec> is used.

Example:

   DDF2BTR C:\Elliott7\Data\AR*.BTR C:\Elliott7\DDF40

[OK]