# Terminal Set Up

These instructions are designed to detail the process of setting up a new terminal to use Gold.

**It is recommended that this procedure be carried out on the terminal being created to ensure the best use of the default settings.**

All the required options are available on the System Management, Security menu.

The Terminal Identity File automatically creates and maintains a tcp.def file. Both are required for Classic view terminals to access Gold. The tcp.def file should not be altered manually.
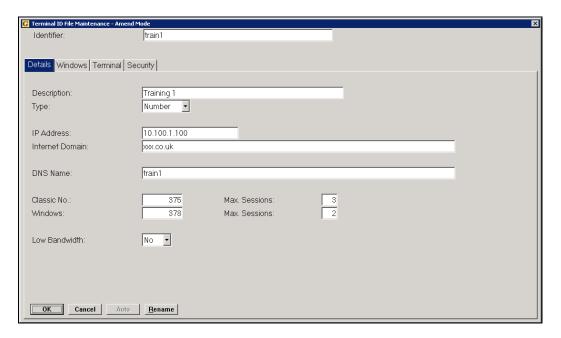
## Terminal Identity Maintenance

The majority of the required information is set up in the identity maintenance program.

To locate an existing terminal to amend enter the terminal identifier or enter a partial identifier followed by a star (*) to search. A list of existing terminals can be printed using the **List** (F5) function.

To set up a new Terminal use the **Insert** (F2) function. Enter the Identifier for the new terminal. This should be the computer name from Windows.

### Details

This tab sets the terminal type and numbers used.
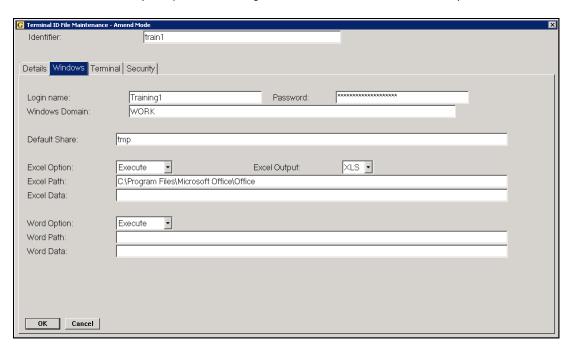
Key Entry Fields (# indicates default setting)

| Description | | Enter the name of the terminal user or the description of its location.<br>The details entered here will be displayed at the top of the menu screen.<br>Entries could be names, e.g., "John Smith" or descriptions such as "Stores Counter". |
| --- | --- | --- |
| Type | Number #<br>Base | - Standard Network Terminal Numbering.<br>- Terminal number selected from system id for Serial connections. |
| IP Address | Defaults to IP address of pc | Enter the IP (internet protocol) address or machine name of the computer. |
| Internet Domain | Defaults to the company internet domain | Enter the Internet Domain Name, usually the domain used for company email addresses.<br>E.g. ibcos.co.uk |
| DNS Name | Defaults to the current computer name | Enter DNS or computer name.  This is the name by which the computer is known on the local area network. |
| Classic No.: | See auto option notes | Enter the Initial Terminal Number for Classic View or 0 if Classic View is not used. |
| Max Sessions | | Enter the maximum number of Classic view sessions available to the terminal. |
| **Note – entering a start number e.g. 100 in the Classic No field and a number of maximum sessions followed by the Verify (F4) function will allow the system to auto-detect the first available terminal number with the specified number of sessions available.  Initially the field will show >= in front of the entered number and will update this to the next available terminal number greater than or equal to the one entered, allowing for the number of sessions specified.** | | |
| Windows: | | Enter the Terminal number to be used for Windows sessions or 0 if not used.  The same terminal number is used for all windows sessions. |
| **Note – entering a start number e.g. 100 in the Windows No field followed by the Verify (F4) function will allow the system to auto-detect the first available terminal number.** | | |
| Max Sessions | | Enter the Maximum number of available Windows sessions. |
| Low Bandwidth | Yes<br>No | Select 'Yes' if the terminal has low bandwidth available, for example at a remote depot. |

## Windows

This tab is used to specify the user login details and the default data paths.

Key Entry Fields (# indicates default setting)

| Login Name | PC/Windows Login | Enter the user's pc login name |
|---|---|---|
| Password | PC/Windows Login | Enter the user's pc login password |
| Windows Domain | E.g. Workgroup or Poole | Enter the Windows Domain Name. |
| Default Share | E.g. tmp | Enter the default share location on the local pc for use when transferring files. |
| Excel Option | Execute # <br><br> Notify | Select to run Excel and display the spreadsheet on export. <br> Select to save the Excel export file to the default location and display the file name.  Only for reports not list exports. (recommended setting if using terminal server). |
| Excel Path | Defaults to the standard excel path if a number of Windows sessions has been entered. | Enter the path to the Excel.exe file. This will be used to locate excel when running the report export option. E.g. C:\Program Files\Microsoft Office\ Office (or Office10) |

| Excel Data | Only applicable for Windows | Enter the default directory to store exported Excel files for windows pc's, e.g. C:\tmp<br>If Terminal Server is in use the path would be tmp. |
|---|---|---|

## Terminal

Use this page to enter the general details for the terminal including printer details and export information.



Key Entry Fields (# indicate default setting)

| User Name | | Entry is defaulted from the Description on the Details tab but may be changed if required. |
|---|---|---|
| Classic Type | | Select the type of terminal in use for this terminal number.<br>Only relates to Classic view and is not required if no classic terminal number has been entered. |
| Windows Type | Windows PC<br>Windows TS PC#<br>Windows TS Client | Standard Windows pc on Peer to Peer.<br>Windows PC on a terminal server.<br>Axel base (thin client) on a terminal server. |
| Manual Access Point | Hyperlink available | Enter the Web Access Point code for the Gold help manuals. This code details the Web Browser type and server IP address of the Gold manuals. |

| | | |
|---|---|---|
| Image Access Point | Hyperlink available | Enter the Web Access Point code for Image Access to enable pictures of the wholegoods to be viewed from within Wholegood Enquiry. |
| Change Printer Number? | Yes<br>No # | Allows the default printer number to be changed by the user when printing reports.<br>Relates to Server/Unix printing only. |
| Change Number of Copies? | Yes<br>No # | Allows the user to change the default number of copies when printing reports.<br>Relates to Server/Unix printing only. |
| Printer | | Enter the default printer number to print reports.<br>Printer numbers should be set up in System Management, Text Images/Printers, Printer Maintenance.<br>Relates to Server/Unix printing only. |
| Despatch/Inv Printer No. | | Enter the default printer number to print despatch notes and invoices. |
| PP Model | | Enter a model number to use for Printer Ported printing (printer 99) for printing from a Classic view terminal to a local windows printer (connected directly to the pc) or a Server/Unix printer.<br>Lookup available - use <?> then <Enter>.<br>Select NONE if not in use. |
| PP Paper | | Defaults from the Model code selected above. |
| Print to Screen Format | 132col #<br>80 col | Select to view condensed (80 col) or uncondensed (132 col) when running reports to screen in Classic view.<br>For "dumb" VDU's this parameter should be set to 132.   For computer monitors set the value to 80. |
| Default Report Type<br>(Windows only) | Local<br><br>Server<br><br><br>Preview | Prints to a local windows defined printer.<br><br>Uses XF server to produce the report to Linux/Unix printer.<br><br>Previews report on screen. |
| Windows Invoice Printer | Not in Use | This will be used in future to print invoices to a Windows printer. |

| Allow Windows Export | No # | Prevents the terminal from using the Windows Export facilities. |
| | Yes – No Selection | Allows Windows Export but only using the export code entered below. |
| | Allow Selection | Gives the terminal access to all types of Windows export with the full choice of codes available. |
| File Transfer ID | Hyperlink available | "Yes - No Selection" is set for Allow Windows Export, a specific export code as set up in File Transfer Maintenance must be entered.  The terminal may then export information but only via the type entered. |

## Security

Use this tab to specify the default company and depot for the terminal and which areas of the system may be accessed.

Key Entry Fields

| Default Company | | Enter either '0' (zero) or the actual company number (0-999) that is required at the terminal. '0' will cause the system to ask for company number when logging in. |
|---|---|---|
| Default Depot | | Enter either '0' (zero) or the actual depot number (in the range 1-9 or A-Y excluding N, O, P, Q and S) to be used by this terminal. '0' will cause the system to ask for depot number when logging in. |
| Change Default Company | Yes No # | If this is set to 'Yes' then an option will be available where appropriate to allow the user to change company.  If this question is set to 'No' then the user cannot change company. If company number is set to '0' above then this option must be set to 'Yes'. |
| Change Default Depot | Yes No # | This operates in the same way as Change Default Company above using the same option. |
| Modules | Yes No # | Enter 'Yes' or 'No' against each individual module to determine whether that module is available on the main menu of the terminal in question or not. |