

An Introduction to Eagle Browser

Regardless of your position, whether you're a manager, Point of Sale clerk, buyer, purchasing & receiving... whatever it is that you do, this system will make your job easier.

The browser is the gateway that gives you easy access to all the applications in the system including Inventory, Accounts Receivable, Point of Sale, and more.

In this course, we describe the basics of the Eagle browser, how to sign in and sign out of the system, and how to use the applications menu.

We also describe and show how to use the launch bar and ribbon menu.

Objectives

- Eagle Browser
- Sign-In / Sign-Out
- Applications Menu
- Launch Bar
- Ribbon Menu

Eagle Browser

At the top of the Home screen is a ribbon menu divided into three areas: Navigate, Eagle User, and Training.

On the left are the icons you use to navigate within the browser.

Notice that you can hold your mouse over an icon to get more information about it, including whether a keyboard shortcut is available.

You can sign on and off of the system here and if you have a multi-store system, you can also select the store you are signing into.

If your system is configured for it, you can use the Time Clock section to clock in and out of work.

Selecting the Tools tab on the ribbon menu opens a new set of icons. Use these to print information, set-up or customize your browser, and upload logs and reports.

You can find other options for customizing your browser by choosing the File tab on the ribbon menu. Here you can review or set the options for the Eagle Browser, determine the displayed language, customize sounds, and so forth.

You can change screen settings by selecting the Screen link.

Back on the Home screen, you will find a variety of support options above the ribbon menu.

These buttons provide easy access to Training on Demand, where you'll find lessons such as this one that help you learn how to use the system, online chat, where you can launch a chat session with Epicor's Customer Support team, online help, where you can review help documentation, and Community, where you can join other system users and learn what is working for them.

The main area of the Eagle Browser provides access to all the applications, functions, and reports in your system. You can customize your Home screen by section to see My Alerts, My Favorites, or others like commonly used Links.

Sign-In / Sign-Out

Your system administrator configures the system with user security to establish who can do what on the system. This means your store may be set up to require a user sign-on.

Username are case sensitive so be sure to use the appropriate lower-and upper-case letters.

To sign in, type your username and password, then press Enter.

Keep in mind that the applications that display on your Home screen will vary based on the access and security you're assigned.

If the Eagle Browser is already open and you want to manually sign on to the terminal, click the Sign On button at the top of the screen. When you've signed in successfully, your name will display here.

If you ever find that you do not have access to an application that you work with all the time, security is usually the culprit.

Just sign on and off you go!

To sign off the system just click the Sign Off button.

The system replaces the current signed on user at the top of the screen with a default system user, which is usually a limited security account that has been set up by your system administrator.

Your system may also be set up to sign off automatically when you close the Browser.

Applications Menu

Now that you're signed on, you're ready to start working!

In order to do that, you need to open an application.

The browser has two ways to open applications: through the Applications Menu on the Home screen and the Launch bar.

The Applications Menu is a list of all the Applications that you have access to in your system.

You'll find the most frequently used applications at the top of the list, followed by all of the applications and reports organized by topic or area.

To launch an application choose the folder you're looking for, then find the specific application.

For instance, let's say that you wanted to work on Inventory.

Select the Inventory Folder, then choose from the applications available, in this case Inventory Maintenance.

Now you're ready to get to work!

Sometimes the folders contain sub-folders. Looking back at the Inventory Folder, for example, you'll find the Physical Inventory Folder.

Expanding it opens a list of functions associated with Physical Inventory.

Launch Bar

The second and even easier way to open an application is through the Launch bar.

The launch bar is conveniently located at the top of the Browser just under the Ribbon.

If you can't find the Launch bar, open the Tools Menu and click the Toggle button to make it available again.

As you become familiar with the applications and reports in your Eagle, you'll find you don't need to open the folders to locate an application each time; you just need to know the acronym.

Let's open Inventory Maintenance again, this time using the launch bar.

With the cursor in the launch bar, type the acronym for Inventory Maintenance: IMU, then press Enter and Voila! Inventory Maintenance opens.

Most of the applications and reports have acronyms.

You can find them by holding your cursor over the application or report name in the Browser.

For example, IMU represents Inventory Maintenance, while MVR opens Vendor Maintenance.

You can also use the launch bar to return to applications you have been using recently.

Open the Browser history list by clicking the drop-down arrow located on the far right side of the launch bar.

Then select an item from the list using your mouse or the arrow keys.

The great thing about being able to use either the menu or the launch bar is that you can use the folders to find your way around the system until you learn the shortcuts.

Once you know the shortcuts, simply type them into the launch bar to quickly move through the system.

After a while, you will be surprised at how many acronyms you know and how quickly you can move about.

Ribbon Menu

Let's take a deeper look at the Ribbon and some customizations you can make, including which buttons will appear and what gets listed in your Favorites.

From the File Menu, select Configure, and choose Customize Ribbon.

Notice there is a Ribbon Drop Down at the top of the screen which lets you identify which application Ribbon you are customizing. Once you select the desired application from the drop down, you can select what will show in the Ribbon and the Favorites.

Under Ribbon, you can highlight Available Actions on the left and click the Right arrow to add them to the Ribbon.

If you want to remove actions from the ribbon in the application, highlight the desired action and click on the left arrow.

The Favorites can have up to three columns.

Make sure you start by identifying the column you would like to add a favorite to, then select the desired Action and click the right arrow to move this to that column of your favorites.

You can remove favorites by clicking on the action in the right column and clicking the Left Arrow.

Make sure you click CHANGE to save your Ribbon customization and Favorites selections.

Recap

As you can see, whether you're a manager, Point of Sale clerk, buyer, work in purchasing & receiving or some other capacity, this system will make your job easier.

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