



Efficiency

User Preferences

Version 4.6

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User Preferences

The user preferences are maintained in the User's PC's registry. Select the Preferences option from the User's Utility Menu.

- Activity Preferences
- Client Preference
- Comms Preference
- Database Preferences
- Display Preferences
- Files Preferences
- General Preferences
- Grid Display Preferences
- Marketing Preferences
- Sales Preferences
- Scheduler Preferences
- Service Preferences
- Timers Preference

On this Tab Folder, data is presented under the following groups each on a separate tab sheet. Click on the required tab to maintain the preferences.

General Preferences

The screenshot shows the 'User Preferences' dialog box with the 'General' tab selected. The fields are as follows:

- User Id: supervisor
- Default Country: Australia
- Notes Date Range: 60 Days
- Notes Display Option: Executive
- Auto Close Expansions List: Yes No
- Auto Close Transactions List: Yes No
- Start Report From Desktop: Yes No
- Telesony Batch Numbers:
 - Call Centre: 111
 - Membership: 126
 - Event Management: 0

Fields

User Id

The User Id of the user who had last logged in Efficiency on this PC.

Default Country

Select the default country to be used during data entry for the various addresses.

Notes Date Range

The default numbers of days before today the module notes are displayed for.

Notes Display Option

The default topic category for which the notes will be displayed. The default value can be overridden.

- Executive
- Date

	<ul style="list-style-type: none">▪ Topic
Auto Close Expansions List	Select Yes if the module expansion list will be closed automatically following the selection of an item of the list.
Auto Close Transactions List	Select Yes if the module transactions list will be closed automatically following the selection of an item of the list.
Start Report from Desktop	Select Yes to allow the user to start the Reports from the desktop and disable the direct access from the Efficiency client, otherwise the report access is available only from the Efficiency Menu. Both options cannot be used on the same desktop.
Temporary Batch Numbers	The current temporary batch numbers for the following modules are displayed in the following fields. The fields are editable for the supervisor. <ul style="list-style-type: none">▪ Call Centre▪ Membership▪ Event Management

Display Preferences

Start up

Show Sayings

Select yes to display sayings after logging on.

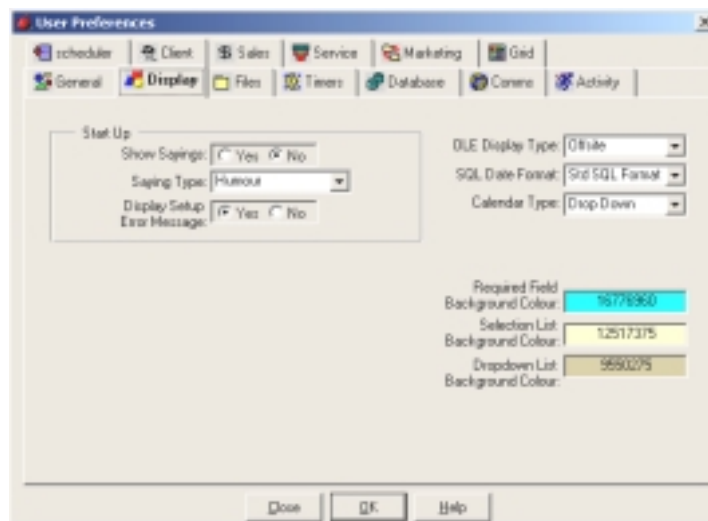
Just after the successful login, a randomly selected "Quote" of the nominated category will be displayed.

Saying Type

Select the type of the quotes to be displayed. These options are available:

- Business
- Life Style
- Humour
- Miscellaneous
- Efficiency

This function is not available if the 'Module Auto Start' function was enabled.



Display Set Up Error Message

Error messages will display on the screen, if the system is not setup properly

OLE Display Type

Select the default value.

SQL Date Format

Select the default value.

Required Field, Selection List and Drop Down Background Colour

Efficiency allows the user to nominate a colour that is used to highlight the required fields on the data maintenance windows and the colour of the background of the selection and drop down lists.

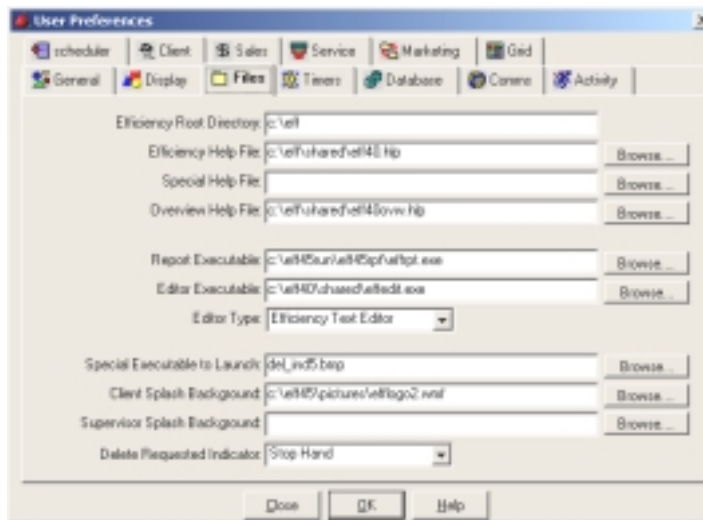
If you double click on these fields the following "Colour Selector" object will be displayed.

Move the horizontal bar arrows to mix and match a colour. The <OK> command button will register the corresponding integer on the field.

Select "White" for no colour display.

Files Preferences

Fields

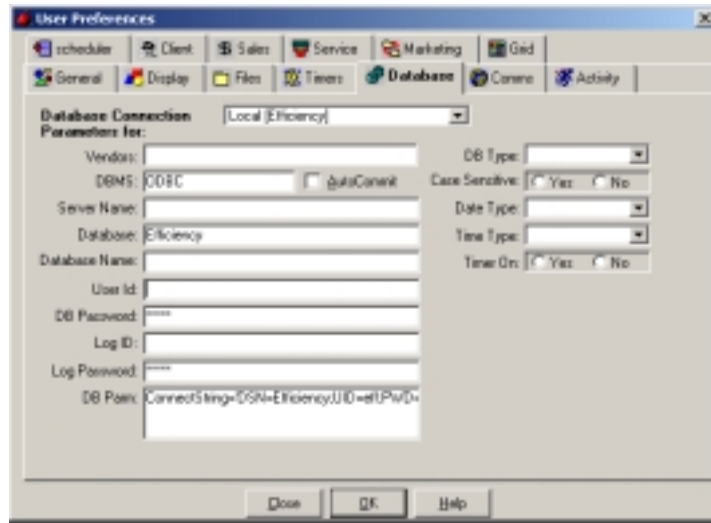


- Efficiency Help File** Enter here the root directory for Efficiency.
- This is used for the shared files and PDF file.
- Efficiency Help File** Enter here the Efficiency Help file name and the directory path. The default file name is **eff40.hlp**.
- Special Help File** Enter here the Site Specific Special Help if available file name and the directory path
- Overview Help File** Enter here the Efficiency Overview Help file name and the directory path. The default file name is **eff40ovw.hlp**.
- Report Executable** Enter here the directory path of the reports executable files.
- The default value is c:\eff40\eff40rpt\effrpt.exe
- Editor Executable** Many times we need to use a text editor , rather than a word processor. Typical examples; editing an "INI" file or creating and editing and "ASCII" file, or taking down simple notes.
- The text editor is accessible from the "Files" pull down menu.
- Efficiency is provided with a windows text editor and a rich text editor.
- Both editors are stored in the effedit.exe file; You can use the "Browse" button to locate this file.
- You may select also your favourite text editor by entering its path and the start up file name.
- Editor Type** Select from the drop down list one of the three options.
- Efficiency Text Editor
 - Efficiency Rich Text Editor
 - Other Editor (User's own)

Special Executable to Launch	<p>Enter an executable file name.</p> <p>When the Launch option of the Files menu is selected, the window will be populated with the executable file so that it is ready to run.</p>
Client Splash Background	<p>Select background picture for Client Splash Background. The default file is splash.wmf.</p>
Supervisor Splash Background	<p>Select background picture for Supervisor.</p>
Delete Requested Indicator	<p>When the Soft Delete option is used, the delete requested records are displayed in red at the drop down lists and enquiry lists. On the data-entry screen changing of the text colour may not be always feasible. Instead, an icon that is selected here is displayed at the top left corner of the data entry screen for the delete requested records. The icon options are:</p> <ul style="list-style-type: none">▪ Red Cross▪ Red Box▪ Letter D▪ White Cross▪ Stop Hand

Database Preferences

Fields



Database Connection Parameters For:

Select from the drop down list one of the following options:

- Local (Efficiency)
- Host (Host)
- ISQL
- Master (Efficiency Master)
- Training (Efficiency Train)

Vendors

Enter here the supplier of the DB System.

DBMS

The database management system used. ODBC is the default entry.

Auto Commit

Check this box if the database is performing Auto commit.

Server Name

The name of the server that is accessing the database.

Database

The name of the database profile (i.e. eff40) is used for Efficiency version 4.0 application.

Database Name

The Name of the database used.

User Id

The user id.

DB Password

Password to login into Database.

Log Id

System's log on ID.

Log Password

System's logon password.

DB Parm

Database connection parameters used to connect to the database.

ConnectionString='DSN=Efficiency;UID=john;PWD=mypassword;'

DB Type

Type of Database - select from drop down list based on how the database is handling the date and time type data. SQL Anywhere - If database can handle date and time type data. Oracle - If database can only handle datetime type data.

Case Sensitive

Select Yes or No.

Date Type	Select from drop down list.
Time Type	Select from drop down list.
Timer On	Yes if the timer is on.

Comms Preferences

On this tab modem, TAPI, email and SMS related user preferences are maintained

Fields for Modem, TAPI and Autodial

The modem and TAPI connection parameters for your PC can be maintained here. The modem values should be taken from the operating instructions of your modem.

If you do not have Microsoft TAPI system was not installed on your PC it is recommended not to set the TAPI related options.

Comm Method

Communication method used. Select one of the following

- WIN32
- TAPI

Manual Dial On

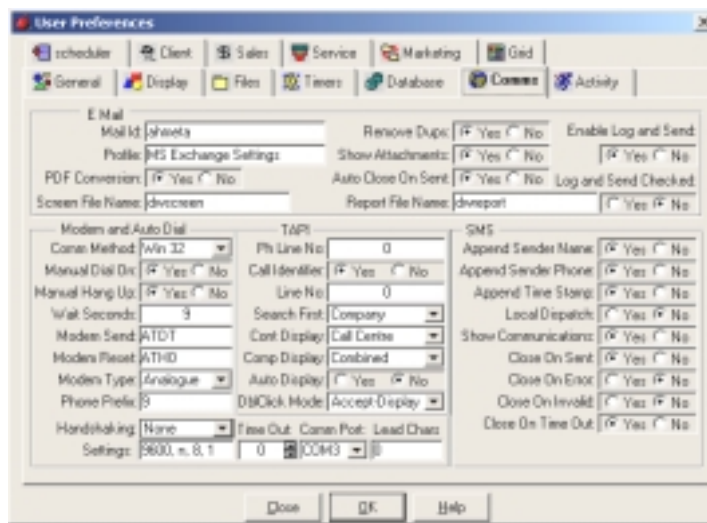
When a modem is used in user's network, select Yes or no to activate or deactivate manual dialling.

Manual Hang Up

When a modem is used in user's network, select Yes or no to activate or deactivate the Automatic Hang Up.

Modem Wait Seconds

Time in seconds before modem disconnects if the connection was not made.



Modem Sent

Enter here the dial string specified in the modem operating instructions i.e. ATDT

Modem Reset

Time at which modem is auto reset.

Comm Port

The DOS name of the serial port that the modem is connected to.

- COMM1
- COMM2
- COMM3
- COMM4

Phone Prefix

Enter here the phone prefix specified in the modem operating instructions i.e. 9,

Handshaking

Code specifying what type handshaking the modem is to use.

- Default is 2.
- 0 = None
- 1 = XonXoff

▪ 2 = RTS
 ▪ 3 = RTSXonXoff

Settings Four settings for the serial port and modem.

Speed, Parity, Data Bits, Stop Bits.

See Serial Port and Modem manuals for available values.

Default is 9600, n, 8, 1.

Typical range of values

Speed = 1200, 2400, 4800, 9600

Parity = (n)one, (e)ven, (o)dd

Data bits = 6, 7, 8

Stop Bits = 0, 1

Timeout Seconds before time out occurs after dialling is started.

Default is 0 (no timeout).

Valid range is 1.60

Modem Type Default is A.

Type of modem connected to the serial port.

A Analogue modem
D Digital Modem or GSM phone - future enhancement)

Fields for TAPI

Phone Line Number The phone line number that was set up in TAPI

Call Identifier If the Call Identifier On = No then only the Autodial function will be available. If this is set to Yes then the Caller Identifier and record populate function will be enabled.

TAPI Line No Enter here the TAPI line number.

Search First Phone search logic and order based on the contact search option. The search is stopped as soon as the matching phone number is found. If your organisation is mainly dealing with companies as customers then set the option to Company (CU) otherwise set it to Contact (CO).

Module	Phone Numbers	Search CO	Search CU
Contact	Contact.preferred_Phone	1	8
	Contact.prvt_ph	2	6
	Contact.prvt_mob_ph	3	7
Employee	Contdivs.direct_ph	4	1
	Contdivs.direct_mob_ph	5	2
	Compsite.site_ph1	6	3
Contact	Compsite.site_ph2	7	4
	Contact.bus_ph	8	5

Comp Display Select one of the following options to display when the call was identified as a company or company contact.

- Company
- Combined

Cont Display	Select one of the following options to display when the call was identified as a contact. <ul style="list-style-type: none"> - Contact - Membership - Combined - Call Centre
Auto Display	Set it to Yes if there was a single record as an identified caller to display the nominated display window.
Double Click Mode	Select one of the options so that the caller identified window will be treated accordingly after a double click on the selected item. <p>Accept the call and Display the nominated window but do not close.</p> <p>Display the nominated window and close the identifier window.</p>
Lead Chars	Enter here any characters which will be ignored by Efficiency when using the Phone number passed on by the telephony system. <p>For example if you enter here '00', these two zeros will be stripped off from the beginning of the telephone number.</p>

Fields for Email

Mail Id	Enter here the usual email id of the user of the desktop.
Profile	Enter the user's email profile.
PDF Conversion	Check this button if the documents to be converted to PDF before attaching to an Email.
Screen File Name	Enter here a default file name to be used for screen capture.
Remove Dups:	Check this button if duplicate addresses to be removed from the recipient list.
Show Attachments	Check this button if the attachments window to be shown on the email window as default.
Auto Close After Send	Enter here yes if the Email window will close automatically after sending the email.
Report File Name	Enter here the name of the default file to be used as data holder when the report was ready to be attached to an email.
Enable Log and Send	Check this box if the Log and Send functions is to be enabled.
Log and Send Checked	Check this button if the Log and Send function will be defaulted on the email window.

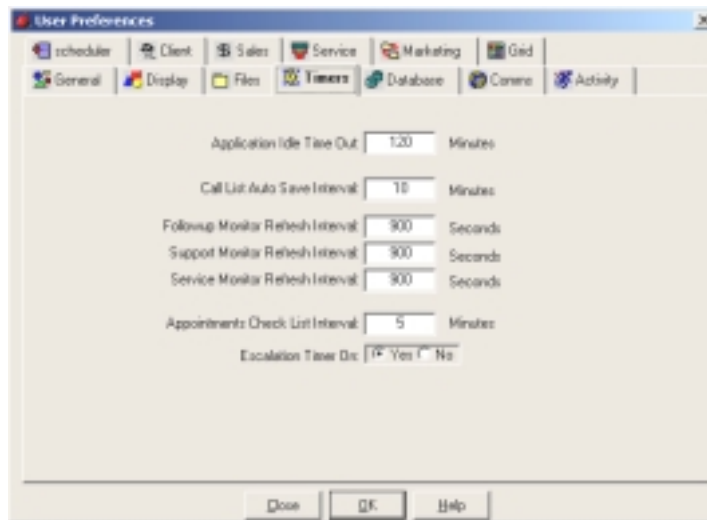
Fields for SMS

Append Sender's Name	Yes = Sender's name will be appended to the SMS message.
Append Sender's Phone	Yes = Sender's phone will be appended to the SMS message.
Append Timestamp	Yes = The date and time of the dispatch will be appended to the SMS message.
Local Dispatch	Yes = The SMS message will be send using the local modem. Otherwise, it will be stored in the log file to be processed by the Efficiency Task Manager.

Show Communications	Yes = The SMS communications with the carrier will be displayed on the Communications tab of the SMS tab folder.
Close On Sent	Yes = The SMS tab folder will be closed after a successful send.
Close On Error	Yes = The SMS tab folder will be closed after an error.
Close On Invalid	Yes = The SMS tab folder will be closed after an Invalid Phone Number error. Yes = The SMS tab folder will be closed if the time out was expired.

Timers Preferences

Fields



Application Idle Time Out Enter here a value in minutes. If the Efficiency screen has not been used more than this amount, Efficiency System Manager will automatically log the user out from the application. If there is no constraint for the number of users on the system enter here a large number i.e. 12000, 20000 etc.

To override the function enter 0 or blank in the field.

Call List Auto Save Interval Minutes before auto saving begins.

Follow Up Monitor Refresh Interval Seconds before refreshing the follow up monitor screen.

Support Monitor Refresh Interval Seconds before refreshing support monitor.

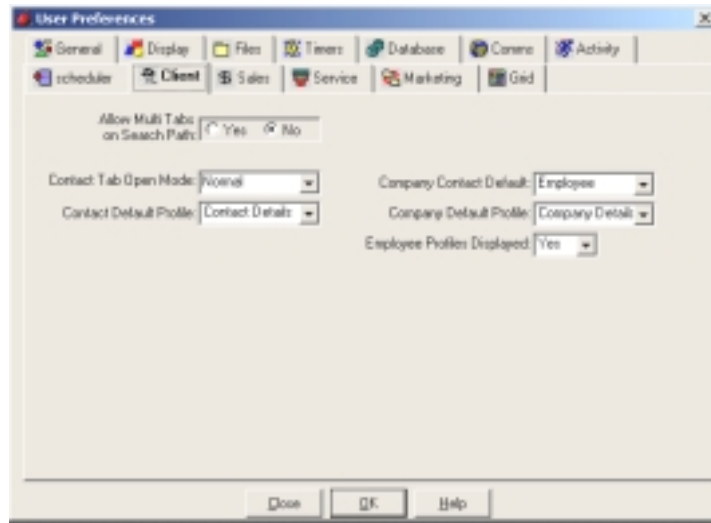
Service Monitor Refresh Interval Seconds before refreshing service monitor.

Escalation Timer On Enabling escalation timer

Appointments Refresh Interval Minutes before refreshing the appointments warning icon.

Client Preferences

Fields



- Allow Multi Tabs** Click On the Yes button to allow displaying each contact or company record on a new contact or company tab folder.
- Contact Tab Open Mode** Select Minimised or Normal as an opening window state for the contact tab folder.
- Set it to Minimised if the Diary system is set to auto start.
- Contact Default Profile** Select which profiles summary is to be displayed on the Contact Management Tab as default. The options are:
- Contact Profiles
 - Contact Details
- Company Contact Default** Select which company contact summary is to be displayed on the Company Management Window and Tab as default. The options are:
- Employee (contact)
 - Relations
 - Member
- Company Default Profile** Select which profiles summary is to be displayed on Company Management Window and Tab as default. The options are:
- Company Profiles
 - Company Details
 - Company Types
- Employee Profiles Displayed** Select Yes if the employee (contact) profiles is displayed on the Company Employee (Contact) entry window/

Activity Preferences

Fields For Executive

The following are the default values to be used when displaying the activity history or follow up.

Activity Type	Type of activity type. Enter a space character to allow all the activity types to be displayed.
Use Quick Enter	Check the Yes radio button to use the activity quick entry window as default.
Activity Date Range	The number of days of the historical activities to display.
Next Act Date Range	The number of days of the future activities to display.
Auto Display	Check the Yes radio button to display the activities automatically.

The screenshot shows the 'User Preferences' dialog box with the 'Activity' tab selected. The 'Executive' section includes dropdowns for Activity Type, Contact, Company, Employee, and Module. Below these are radio buttons for 'Use Quick Enter' (Yes/No), 'Activity Date Range' (120), 'Next Act Date Range' (30), and 'Auto Display' (Yes/No). The 'Default New Module' is set to 'Service'. The 'Activity Status' section includes dropdowns for Activity Status, Follow Up Act Stat (Open), Default Company Site (00001), Activity Notes On (Yes/No), and Resend Activity After Edit (Yes/No). The 'Daily Activity' section has a dropdown for Daily Activity (All Activities) and a dropdown for Display Mode. The 'Call List' section includes a dropdown for Default File (CallList), a 'Browse...' button, and dropdowns for Contact Numbers, Contact Positions, and Inc or Exc (Include). The 'To Do List' section includes a dropdown for Display Mode (Business), a dropdown for Default Module (Contact), and dropdowns for Combined, One Site (No), and One Contact (No). Buttons for 'Close', 'OK', and 'Help' are at the bottom.

Fields For Contact

The following are the default values to be used when displaying the activity history

Activity Type	Type of activity type. Enter a space character to allow all the activity types to be displayed.
Use Quick Enter	Check the Yes radio button to use the activity quick entry window as default.
Activity Date Range	The number of days of the historical activities to display.

Fields For Company

The following are the default values to be used when displaying the activity history

Activity Type	Type of activity type. Enter a space character to allow all the activity types to be displayed.
Activity Date Range	The number of days of the historical activities to display.

Fields For Company Employee (Contact)

The following are the default values to be used when displaying the activity history

Activity Type	Type of activity type. Enter a space character to allow all the activity types to be displayed
----------------------	--

Check the Yes radio button to use the activity quick entry window as default.

Activity Date Range The number of days of the historical activities to display.

Fields For Module

The following are the default values to be used when displaying the activity history

Activity Date Range The number of days of the historical activities to display.

Fields For General

Activity Status The status activities to be displayed as default. Enter a space character to allow all the statuses to be displayed

Default Company Site Company site to appear on the field as default. The main site id is always 00001.

Activity Notes On Check the Yes radio button to display the activity notes as default.

Reselect Activity After Edit Check the Yes radio button to re display an activity after editing.

Daily Activity Display Mode When the Executive Daily Activities window is active one of the following display options can be set as default:

- Tasks only
- Appointments only
- All Activities

Fields For Call List

Default File Default file to use for call list.

Contact Numbers Default contact numbers (comma separated) to display on the call list.

Inc or Exc Include or Exclude the above contacts from the list.

Contact Positions Default contact positions Ids (comma separated) to display on the call list.

Inc or Exc Include or Exclude the above contacts from the list.

To Do List

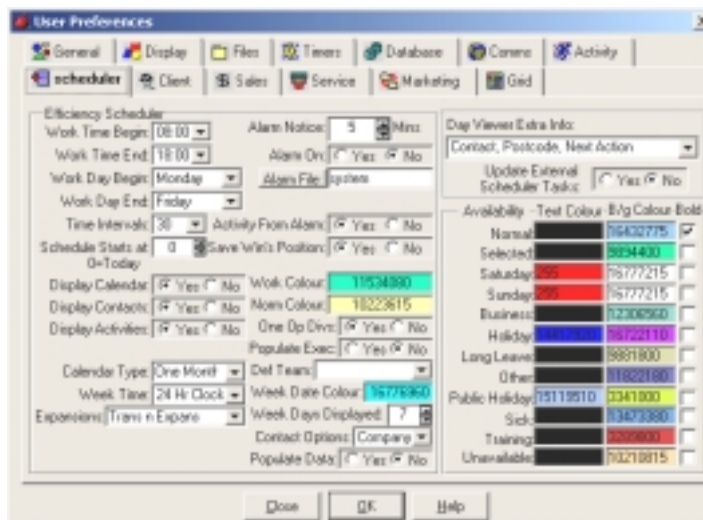
Display Mode Select one of the following options to attach it to the To Do icon at the main menu bar.

- Personal
- Business

Default Module Select a module of which To Do lists will be displayed when the To Do enquiry was activated from the menu.

Scheduler Preferences

Fields For Efficiency Scheduler The following tab sheet is used to set various user preferences for the Scheduler.



Work Time Begin

Select here the starting time of the normal workday as at a full or a half hour.

The format is hh:mm as a 24-hour clock format.

Examples: 08:00, 08:30, 09:00

Work Time End

Select here the ending time of the normal workday as at a full or a half hour.

The format is hh:mm as a 24-hour clock format.

Examples: 17:00, 17:30, 18:00

Work Day Begin

Select here the first day of the normal working week.

Work Day End

Select here the last day of the normal working week.

Alarm Notice

Select here a value that is used to activate the alarm this amount minutes before the actual alarm time.

Work Colour

Double click on this field to display the Colour Selector window. The selected colour is used to display the Working Hours of the day on the Scheduler Day Viewer.

Norm Colour

Double click on this field to display the Colour Selector window. The selected colour is used to display the background colour of the day on the Scheduler Day Viewer.

Time Intervals

Select here a time interval of 30 minutes to be used to set the appointments.

During setting an appointment or a next activity time, the value entered will automatically be rounded to the interval was set here.

Efficiency version 4.0 uses only the 30-minute intervals.

Save Window's Position

Click on the "Yes" radio button if you wish to save the screen position of the scheduler related windows.

Schedule Starts At	Select here a number to represent the day for which the Daily Viewer is to be displayed.								
	<table> <tr> <td>0</td> <td>Today</td> </tr> <tr> <td>1</td> <td>Tomorrow</td> </tr> <tr> <td>2</td> <td>2 Days from today</td> </tr> <tr> <td>10</td> <td>10 Days from today</td> </tr> </table>	0	Today	1	Tomorrow	2	2 Days from today	10	10 Days from today
0	Today								
1	Tomorrow								
2	2 Days from today								
10	10 Days from today								
One Operating Division	<p>Click on the "Yes" radio button if you wish to display the appointments for the other operating divisions</p> <p>The System Security Manager may override this function.</p>								
Alarm File	<p>Select a file to be executed for Alarm.</p> <p>The default is SYSTEM.</p>								
Alarm On	Check the radio button if alarm will be defaulted on the scheduled activity generation.								
Activity From Alarm	Check the radio button if the activity can be accessed from the alarm pop up.								
Populate Executives	<p>Select yes to default to the login executive to display the contacts.</p> <p>If the No option is selected with the display contacts option, system will attempt to retrieve all the contacts and their activities by default.</p>								
Default Team	Select a default executive team that is used to populate the group scheduler with the executives who belongs to the team.								
Week Date Colour	Colour option for this field for display purposes. Double click to activate the colour selector.								
Week Days Displayed	Number of days to be displayed in the 2 weekly viewer.								
Display Calendar	Select yes to display calendar by default.								
Calendar Type	1 month or 2 months calendar to display as default.								
Display Contacts	Select yes to display contacts and their activities by default.								
Contact Options	<p>Select one of the following options to display as contacts by default.</p> <ul style="list-style-type: none"> ▪ Contacts ▪ Members ▪ Family ▪ Company ▪ Activity 								
Display Activities	Select yes to display the executive activities by default.								
Populate Data	Select yes to populate the contacts data automatically.								
Display Contact Expansions	Select one of the following to expansion options to attach the expansion data to the contacts display.								

- None
- Transactions
- Expansions
- Transactions and Expansions

Week Time

Select here one of the two options as how to display the time on the weekly scheduler:

24 Hr Clock	Displays hr and the duration of the appointment
12 Hr Clock	Display hr am/pm

Day Viewer Extra Info

Normally one of the following details is displayed for each appointment on the scheduler day and week viewer.

Activity Notes if exist, otherwise

Next Action

Here, you can assign the following combinations of the additional information also to be displayed:

Contact Based Systems	Contact
	Contact Next Action
	Contact Suburb
	Contact Postcode
Company Based Systems	Company
	Company Suburb
	Company Postcode
	Company Suburb Postcode
	Employee Company
	Employee Company Suburb
	Employee Company Postcode
	Employee Company Suburb Postcode

Update External Scheduler Tasks

If an external scheduler is used such as Microsoft Outlook, Notes or GroupWise select yes to transfer the Efficiency tasks to the external scheduler.

Fields For Availability

Customising colour option for display for the following:

Normal

- Selected
- Saturday
- Sunday

Business

- Holiday
- Long Leave
- Other
- Public Holiday
- Sick
- Training
- Unavailable

Sales Preferences

Fields For Quotation

Quotation and Order Entry user preferences are maintained on this tab sheet.

Date Range

Enter here number of days that are used during the quotation enquiries as a lead from the current date.

Follow up Date Range

No of days to follow up the sales.

Status Displayed

Select from drop down list a default quotation status to be displayed during the enquiries.

Display Profiles

Select Yes if the Quotation profiles are to be displayed on the main quotation tab.

Fields For Order Entry

Date Range

Enter here number of days that are used during the order entry enquiries as a lead from the current date.

Follow up Date Range

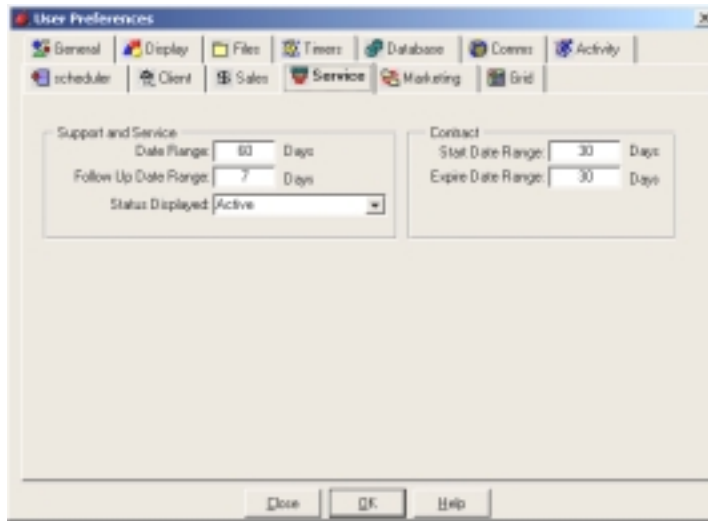
No of days to follow up the sales.

Status Displayed

Select from drop down list a default order entry status to be displayed during the enquiries.

Service Preferences

Fields For Support and Service



Date Range

Enter here the number of days that are used during the support and service enquiries as a lead from the current date.

Follow up Date Range

No of days to follow up the service and support.

Status Displayed

Select from drop down list a default support or service log status to be displayed during the enquiries.

Fields For Contract

Start Date Range

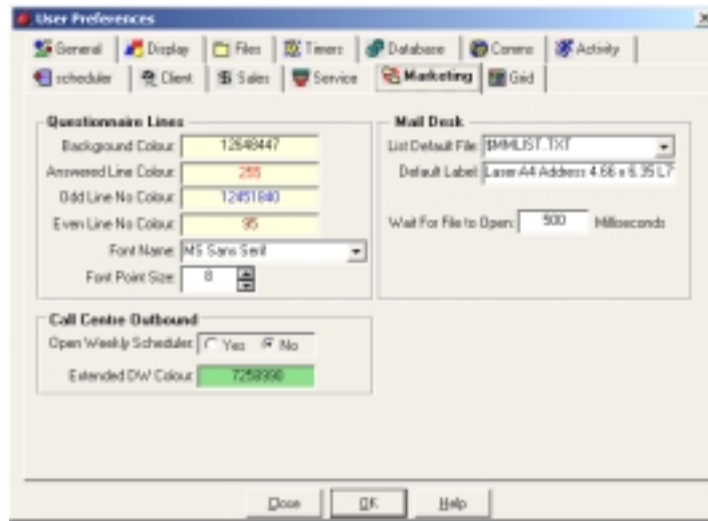
Enter here the number of days that are used as a lead from the current date.

Expire Date Range

Enter here the number of days that are used as a lead after the current date.

Marketing Preferences

Fields For Questionnaire



Background Colour Colour option for this field for display on questionnaire.

Answered Line Colour Colour option for this field for display on questionnaire.

Odd Line No Colour Colour option for this field for display on questionnaire.

Even Line No Colour Colour option for this field for display on questionnaire.

Font Name Select font name.

Font Point Size Select font size.

Fields For Mail Desk

List Default File The default file name to be used for the call list.

Default Label The default label name.

Wait For File to Open This is used for the mail merge to wait for the nominated time to open the word processor document.

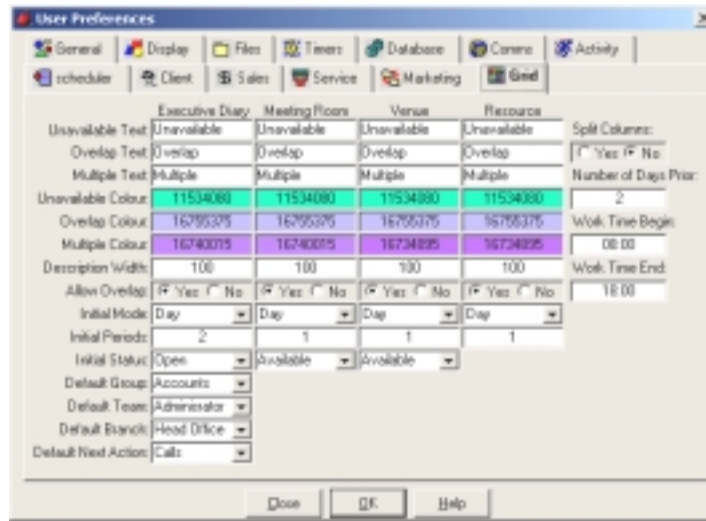
500 milliseconds should be satisfactory wait time for most of the Pentium PCs.

Fields For Call Centre Outbound

Open Weekly Scheduler Check the Yes radio button if the Weekly Scheduler to be opened when the Outbound Call Centre module is started

Grid Display Preferences

Fields For Grid Display



Unavailable Text

The text to appear as the unavailable status label.

Example: Unavailable

Overlap Text

The text to appear as the overlap status label.

Example: Overlap

Multiple Text

The text to appear as the multiple appointments status label.

Example: Multiple

Unavailable Colour

Double click to select the unavailable colour.

Overlap Colour

Double click to select the overlap colour.

Multiple Colour

Double click to select the multiple appointments colour.

Description Width

Enter the width of the description.

The default value is 100.

Allow Overlap

Check the yes button if overlap is allowed.

Initial Mode

Select one of the display modes as default.

- Day
- Week
- Month

Initial Periods

Enter a value to be used as the number of periods to display.

Initial Status

Select from the drop down list a status value to be used for the initial grid display. Leave it blank for all statuses.

Default Group

Select from the drop down list an executive group value to be used for the initial grid display. Leave it blank for all groups

Default Team	Select from the drop down list an executive team value to be used for the initial grid display. Leave it blank for all teams.
Default Branch	Select from the drop down list an executive branch value to be used for the initial grid display. Leave it blank for all branches
Default Activity Type	Select from the drop down list an activity type value to be used for the initial grid display. Leave it blank for all activity types.
Split Columns	Check box Yes displays the grid in two-split section.
Work Time Begin	Enter the start time of the working day. Example: 08:00
Work Time Begin	Enter the end time of the working day. Example: 17:00
Number of Days Prior	Enter the number of days to be shown prior to the selected date.