Resolving Locked Records

SouthWare has some built-in tools to help you resolve common conflicts caused by locked records.

(NOTE: Access to the Lock Log portal will require valid CMSS through the release date – which is coming soon!)

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Background – Locked Records

To ensure data integrity in SouthWare files, when a data record is being changed by a user it is locked so that only one user at a time may change the same record. When you run a process such as End of Day it updates numerous records. If another user has accessed one of those records in the maintenance or entry program and locked it for changing, the process will be paused on the record it can't update. The update process cannot continue until the record is unlocked by the other user.

In some instances a user leaves their workstation with a record locked. Resolving this can take time if you don't know who has the record locked.

Selective Logging of Locked Records

There is built-in help for records locked for editing in the following files:

- Customer file
- Stock file
- Sales Order file
- Service Order file

These are the files that typically cause locked record issues. Whenever a user locks a record for change in one of these files via the entry/maintenance program, the system logs who locked the record and when it was locked. When the user finishes editing the record the log record is deleted.

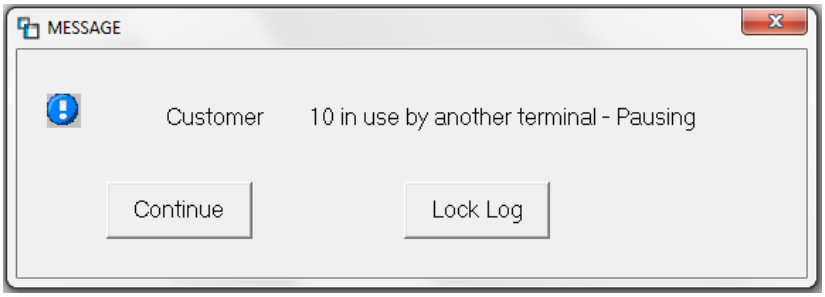
Resolving Locked Record Issues

The following processes have special built-in programming to help resolve issues with locked records in the files above:

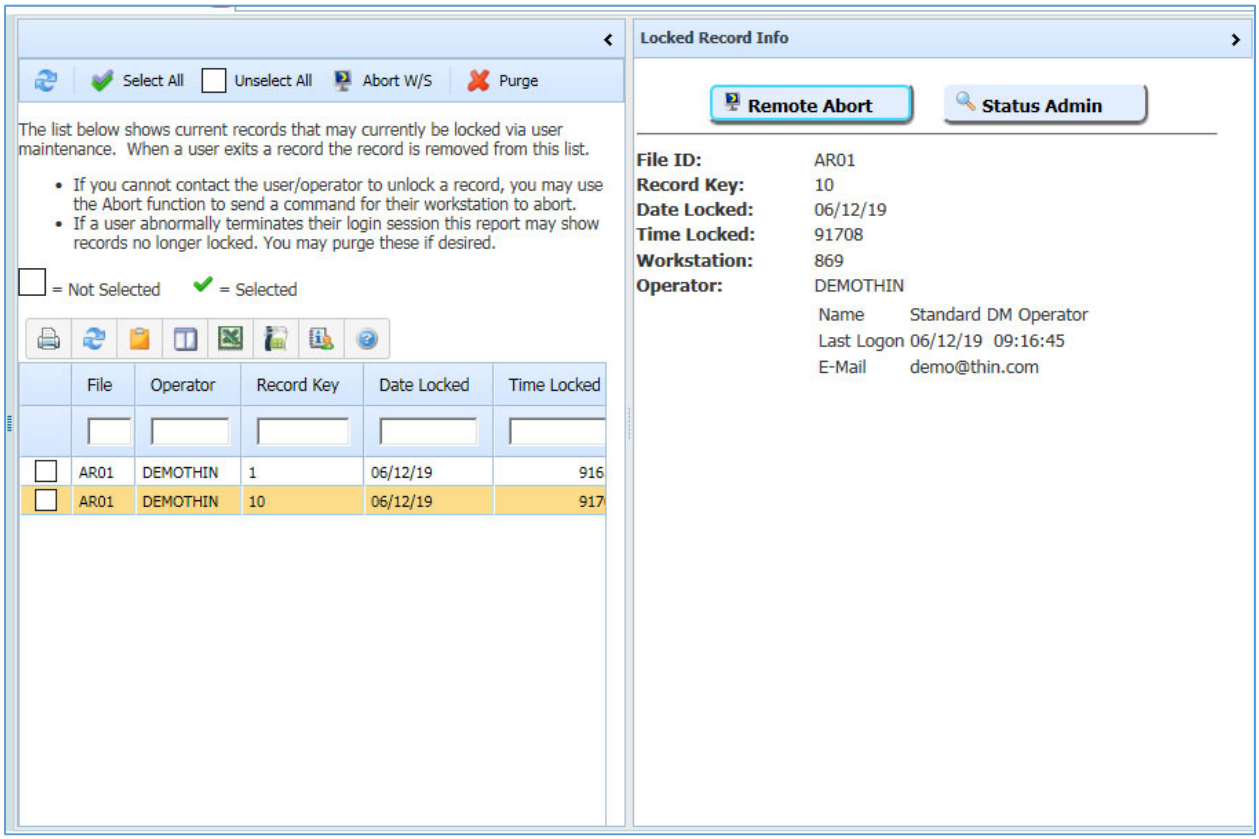
- Invoicing End of Day update (IS-02-04, SV-02-06)
- Generate Contract Billings (SV-02-01)
- Posting Cash Receipts (AR-02-04)
- Posting Receivings (IS-03-02-04)

When one of these processes encounters a locked record in one of the logged files it does the following:

1. Tries again a few times to make sure the record is still not available after a few seconds.
2. If still locked, the process pauses and displays a message indicating which record is locked that is preventing the process from continuing.
3. From the message you can click “Continue” to try again, or you can click on the “Lock Log” button to view the Locked Logging portal for more information about locked records in that file. **(NOTE: Access to the Lock Log portal requires SouthWare CMSS licensed thru at least 6/30/19)**



Locked Logging for a File



When you access the Locked Logging portal from a lock message the portal shows a list of locked records for that specific file (and highlights the particular record that is locked). Here are options available from the portal:

Identify Who Locked the Record

The view pane to the right provides more information about the locked record including:

- When it was locked
- What operator locked the record
- What workstation locked the record
- Status info for the operator (such as if they are currently logged on)

Remotely Abort the Workstation That Has the Record Locked

Once you have identified who locked a record you may be able to contact them and ask them to free up the record. But that may not be possible if they aren't at their workstation. In that case you have the option to remotely abort their login session so that you can complete the update process.

Normally aborting an idle workstation is okay, but there is a risk that the operator is in the middle of entry or some processing that will cause problems. So you should only abort a workstation if you can't get the operator to normally unlock the record.

To abort the workstation you may click on the Remote Abort button in the view. This will confirm that you want to do the abort, and when you confirm the workstation will be aborted. This should free up the locked record, so you can then exit the portal window and select the Continue option in the locked record message.

View Status for All Workstations

From the view pane you may select the Status Admin button to access the Status Manager program (XX-02-01). This lets you see the current status of all workstations and operators.

Abort Selected Workstations

In the portal list you may select multiple locked records and then choose to abort all the selected workstations. After you select records (by clicking on the checkbox or using the Select All button) you may click on the "Abort W/S" option in the toolbar. This will ask for confirmation, then will abort all the workstations selected.

Purge Records from the Locked Log File

In the portal list you may remove log records by selecting them and choosing the Purge option. This may be necessary if you have aborted workstations. The log records are cleared only if a record is normally unlocked by the programs – if you abort a workstation log records will still exist even though the record is no longer locked.

System Administrator - Locked Logging Portal

A system administrator may access the Locked Logging portal via the "XX – System Administrator Portal" selection from the QuickScreens menu. A "Locked Records" option in the menu to the left of the portal will display the Locked Logging portal for ALL files. Within that portal the administrator may access any of the same functions described above.