



ERP Consulting
Web Development
Custom Programming Solutions
Desktop & Web Applications for Manfact

NorthClark Computing, Inc.

Data Audit Utility User Guide

Web and Desktop Applications for Manfact by Epicor

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Introduction

The NorthClark Data Audit Utility (NCC_AUDIT) allows you to track changes to any Manfact data file. A System Administration screen is used to enable Auditing for selected files. Once enabled, an Audit file is automatically updated each time a record is added or modified.

The system stores a complete *before* and *after* image of the record when a change occurs. This can be an invaluable tool for IT professionals when trying to diagnose problems. You do not need to decide in advance which fields may be important, since all fields are captured.

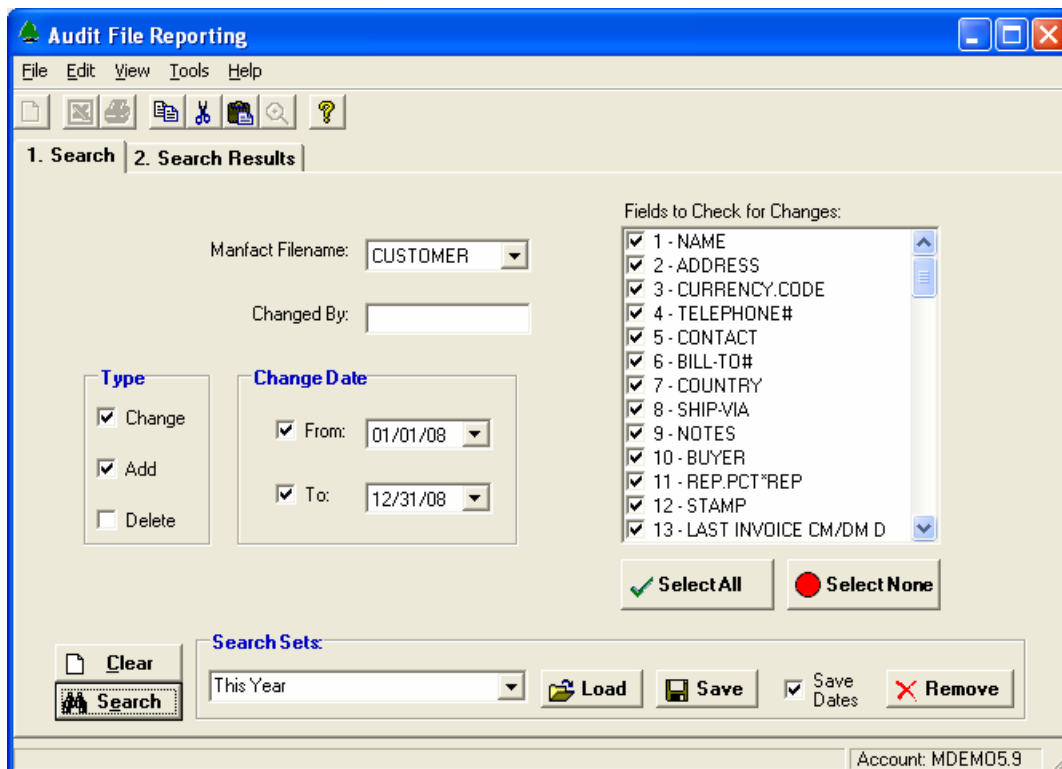
The NCC_AUDIT program is a Windows application that allows you to report on changes made to the files you are currently auditing. You can narrow your search based on the type of update, date range, and fields of interest. For example, you might search the VENDOR audit file to find instances where the Vendor Name field had been modified within the past 6 months.

Updates to the Audit files are initiated by a *Trigger*, which is a feature of the Universe database. So, changes are captured regardless of the program used to modify the data, including changes made using the Editor.

Audit File Reporting

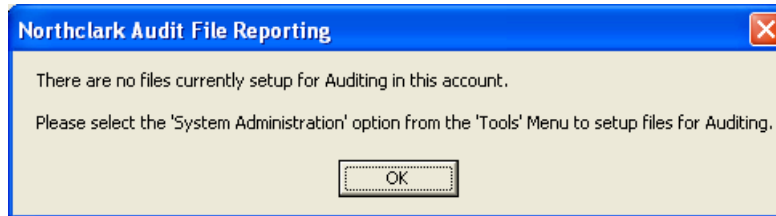
The Main screen of the Audit File Reporting Utility (NCC_AUDIT) is used to report changes made to files you are currently auditing.

Search Options



Select the *Manfact Filename* from the drop-down list (we're using the CUSTOMER file in this example). The fields that may be used in the search (as defined by the System Administrator) are displayed in the *Fields to Check for Changes* list. Use the checkboxes to indicate which fields are of interest when reviewing changes. Use the Changed By, Type, and Change Date options to further narrow your results.

Note, if you have not yet setup any files for auditing, the *Manfact Filename* list will be blank, the Search button will be disabled, and the following message will be displayed. Please proceed to the System Administration section to complete the setup.



Once the desired options have been entered, click the Search button, and your report will be displayed on the *Results* tab, where it may be viewed, printed, or exported to Excel.

Search Sets

The **Search Set** commands at the bottom of the screen allow each user to name and save their favorite search options. Select an existing Search Set from the drop-down list, or simply type a description to name a new Search Set.

Click the **Save** button to save the settings for the named Search Set. Click the **Load** button to recall the saved settings. Click the **Remove** button to permanently delete the Search Set from the list.

Check the **Save Dates** box if you want the system to remember dates when settings are saved. If this box is unchecked, all date fields will default to the current date.

Search Results

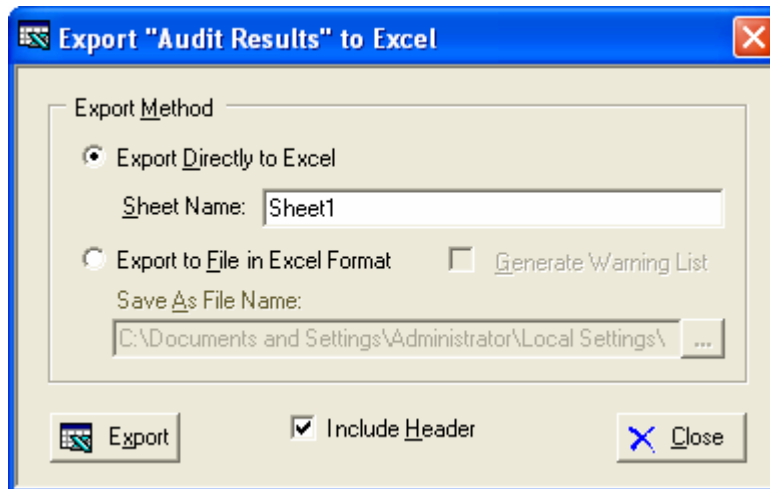
The Search Results tab displays two rows for each Audit record it finds meeting your search criteria. The odd numbered rows are colored grey, and represent the *before* image of the records. The even numbered rows represent the *after* image of each record. Modified fields are highlighted in yellow.

	ID	Change Date	Change Time	Change By	Change Code	NAME	ADDRESS	TELEPHONE#	CONTACT	E
1	101	02/11/08	18:44:48	ADMINISTRATOR	C	Pacific Precision, Inc.	916 Apple Way Suite 20 Los Angeles, CA 90051	213-543-6525	Sherry Brown	11
2						Pacific Precision, Inc.	916 Apple Way Suite 20 Los Angeles, CA 90051	213-543-6525	Sherri Brown	11

Tools

Export to Excel

All spreadsheet views are equipped with the option to Export to Microsoft Excel. Click on the spreadsheet you wish to export, then choose the Export to Excel option from the menu or toolbar.



Export to Excel or to a File?

You may export the contents of the display directly to Excel, or you may choose to create a file in Excel format.

Sheet Name

Enter the Excel sheet name to create. This will automatically default to Sheet1.

Save As File Name

Enter the pathname of the file you wish to create. You may Browse the files by clicking the button to locate the drive and folder where the file will be stored.

Generate Warning List?

Select this option to create a log file. The log file contains error messages and other information about how your Excel file was created. The name of the log file is "CreateExcelFile.log", and it will be stored in the same folder as your spreadsheet.

Include Header

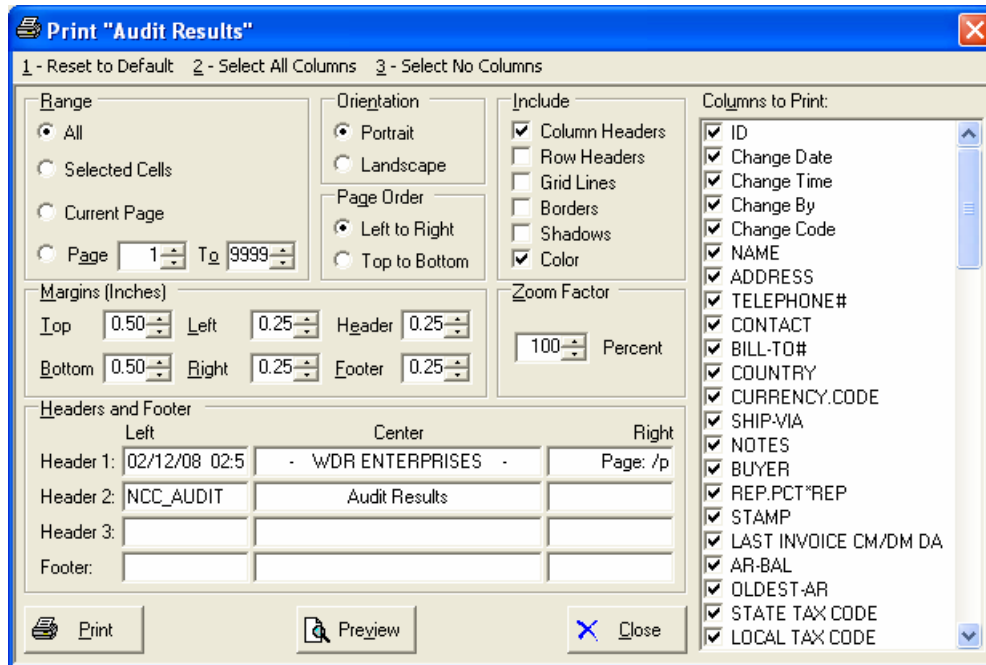
Check this box to export the column headings.

Export Button

Click this button to export your data to Microsoft Excel.

Print a Spreadsheet

All spreadsheet views are equipped with a Print feature. Click on the spreadsheet you wish to print, then choose the Print option from either the menu or the toolbar.



Range - Selecting a Print Range

You may choose to print the entire spreadsheet (all), selected cells (those that you have highlighted on the current screen), the current page (only the rows that are currently visible on your screen), or a range of page numbers.

Orientation - Portrait or Landscape

You may print your report in portrait mode (normal) or landscape mode (sideways). Printing in landscape mode will allow you to fit more columns of information on your report.

Margins - Report Margins

You can make your report more attractive by setting the top, bottom, left, and right margins. Reduce the left and right margins if you need to fit more columns on the report.

Units - Inches or Centimeters?

Are the margins you entered expressed in inches or centimeters?

Page Order

If your report is too wide, it may span multiple pages. When this occurs, do you want the report printed from top to bottom or left to right?

What Do You Want to Print?

You can customize the appearance of your report by printing (or not printing) column headers, row headers, grid lines, borders, shadow, and color.

Headers and Footers

Your report may have up to three lines for the heading, and one line for the footer. The system initially displays a default heading, which you may modify if desired.

Tip: Use /p to designate a page number.

Which Columns Do You Want to Print?

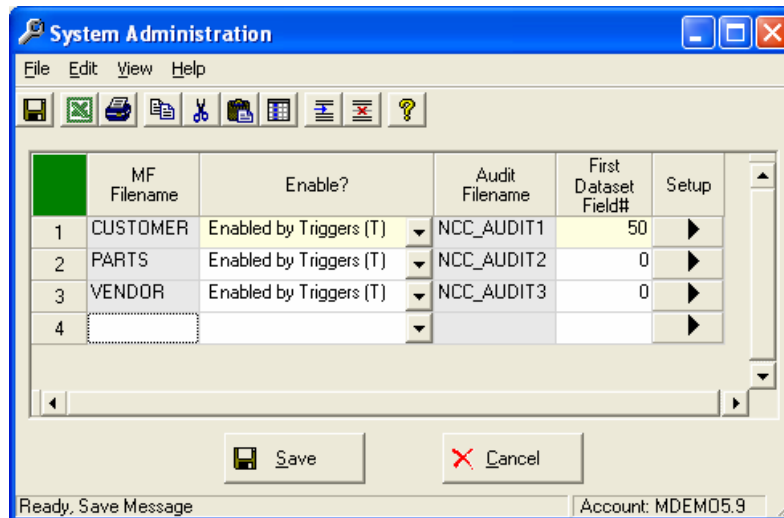
The columns that are available for printing are listed. Select the columns you wish to include on your report.

System Administration

Select the System Administration option from the Tools menu to access this screen. If this option is disabled, it means you do not have sufficient security privileges to perform this function.

Enable Auditing for Selected Files

Create one row on the spreadsheet for each file you wish to audit. Type the name of the Manfact file to be audited, then select “Enabled by Triggers” from the drop-down list to enable auditing.



When you click the [Save] button, the system automatically creates an Audit File (NCC_AUDITx), and establishes a *Universe Trigger* on the file you are auditing. The name of the Audit file is displayed by the system and may not be manually altered.

From this point on, all changes to the specified Manfact file will be recorded in the corresponding Audit file. Before you can report on these changes however, you must click the *Setup* button in the last column to create the reporting specifications.

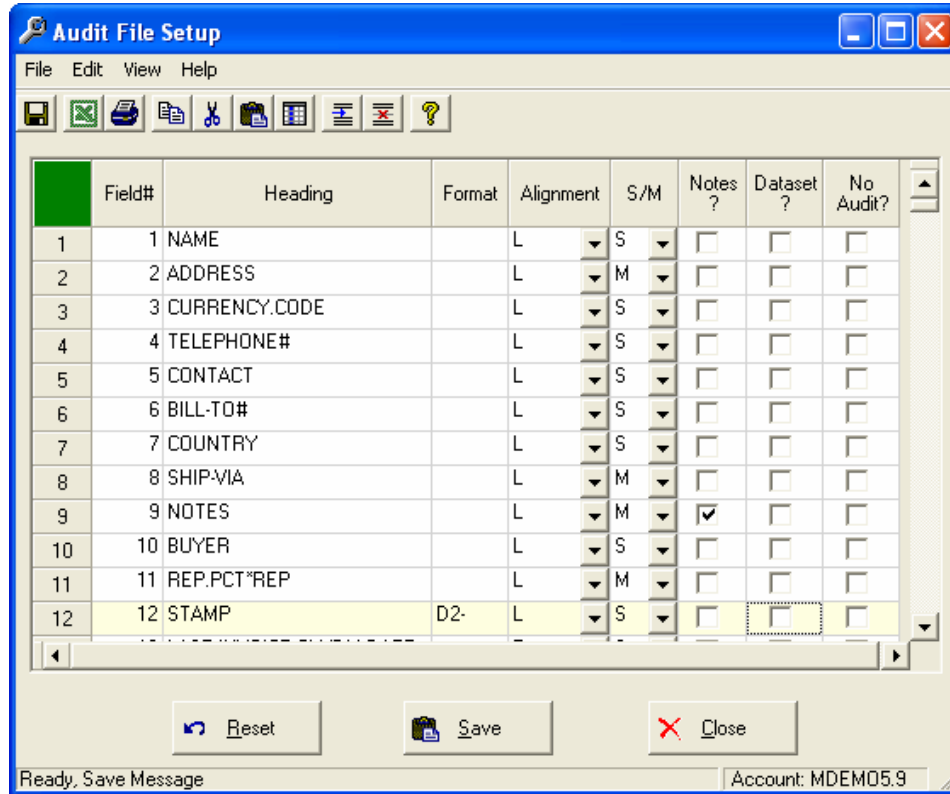
Enable Options

The preferred method for Auditing is to utilize *Triggers* which are a feature of the Universe database. Using this method ensures that all changes are captured, regardless of how the change was made.

If the version of Universe you are running does not support Triggers, a second options is provided, “Enabled by Software (S)”. This option assumes that all programs that may write to the specified file have been modified to support file Auditing. While virtually all NorthClark applications recognize this feature, your standard Manfact applications do not, and will require minor customization. Please contact NorthClark Computing for assistance if you are considering this option.

Setup Change Reporting for Audited Files

The Change Reporting Setup screen is used to create a list of fields the user will be able to report on using the NorthClark File Audit Utility.



Use this view to define the format of the data that will be displayed when the user wishes to generate a report from the audit file. The “Format” and “Alignment” columns may be used to make the report easier to read, but do not change the way information is captured in the Audit file. In the example above, we’ve included the “D2-“ specification for the Stamp field, so the date will be displayed in human-readable format.

The first time you access this screen for a particular Manfact file, the application will initialize the field list using the information from the Dictionary of the Manfact file you are Auditing. Once the contents of the Dictionary have been copied to this screen, you can modify the information for Audit reporting purposes (the Manfact Dictionary will not be changed). Note that you must click the [Save] button to enable Audit file change reporting, even if you did not make any manual changes to this screen.

If desired, you may delete fields from the list that you do not wish to make available for change reporting. For example, you might want to remove certain fields that are system maintained, and not otherwise accessible to users.

By default, any change to a data record will trigger an update to the Audit file. Use the “No Audit” checkbox to prevent specific fields from triggering an Audit update. Excluding system maintained fields may be desirable to help reduce the size of Audit files.

Security

Access to NorthClark applications is governed by the Manfact security system. The System Administrator must add the appropriate commands to each user's security table. Please refer to the Manfact documentation for more information on setting up security tables.

The following NorthClark procedures may be added to the Manfact security tables:

Routine	Description
NCC_AUDIT	Allows access in Application Mode.
NCC_AUDIT_ADMIN	User has access in Application Mode, and can also access the System Administration screen.



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