

1. infoware Field Logger

A common problem with databases is when fields are changed and nobody knows who did it. This may be a relatively minor change, such as a change to a fax number, or a change to more sensitive items such as debtor’s credit limits, trading terms on stop credit flags.

The **infoware** Field Logger allows your system administrator to select which fields are required to be logged. All changes to any field set to be logged are automatically recorded with the users name, date, time, old value and new value. The field logger now checks to all of **infoware**’s standard master files. This applies to all applications from sensitive areas such as Payroll and Debtors through to Creditors, Inventory, Job Cost, Fixed Assets, General Ledger and Cash Book master files. Also, transaction edits such as Due Date and On Hold in Creditors can be logged.

Once the Field Logger has been configured by your System Administrator to determine the fields to be logged, you can enquire on fields changed using the new option C – Changes Log from the status bar on any Masterfile screen.

You will then be prompted to enter the field number for which you wish to see logged changes.

```
Field to display (blank for all, zero for list) .
```

If you do not select a specific field, you will see all changes made to any logged field on this record. You then have the option to view the log in date or field order.

```
Show Changes in Date or Field Order. Enter D or F .
```

A browse window then appears showing all logged changes to the requested field(s) in reverse date/time order (most recent change first). You can then press [V] to View a popup screen showing more detail of the old and new value of the field changed.

```
DEBTOR ACCOUNT MAINTENANCE
Company.....: SS. Debtor Code.....: ABIGCUS . ABN: .
Name.....: A Big Customer . Notes:
Postal Address Physical Address
```

Field & Name	Date	Time	Who	St	Value
56 Credit Stop	230306	14:26:54	tracey	U	Y
56 Credit Stop	230306	14:15:27	tracey	U	N
56 Credit Stop	200306	12:12:36	daryl	U	Y

End of File

All users with access to the current file will have access to the changes log to answer any queries. In the above example, the user ‘tracey’ has taken the credit stop flag off and then reset it 11 minutes later.

The **infoware** Field Logger greatly enhances the integrity and credibility of the database. No longer will there be the question of “someone must have done it”. You can now quickly answer the questions of who & when, and move forward from there. Note that the user’s name recorded is the

current session's login. In environments where more than one person share a terminal login then the user name will not accurately reflect who changed the field. It is therefore critical that each user has their own login and password.

System administrators who require a copy of instructions on how to setup field logging, please email support@satsof.com.au.

infoware Services clients and clients under an infoware Updates and support agreement will either have received this update or it will be available in the next update applied. For other clients, this is an update you may wish to consider to proceed with.

2. Selection Sets

Selection Sets are used in both **reporting** and **data entry** to restrict records to be included in a report or data enquiry.

Selection Sets – AND Condition

When multiple lines are entered on a selection set with the Group field blank, this invokes the **AND** condition – ie ALL condition lines must be true for a record to be selected.

Group	Field	Heading	Rel	Value
.	7	. Amount Now Outstanding	ne	.00.
.	3	. Financial Period	le	200510.
.	4	. Type	.	IN.
.
.
.
.

Selector Sentence:


F6 -Display Fields
 Press Esc Esc -Record Selection Delete -Cancel F10 -Help

Only outstanding invoices before (& including) 200510 will be selected.

Selection Sets – OR Condition

A common requirement when entering Selection Sets is to select multiple codes at the one time e.g. when running a Debtors Trial Balance and you wish to select 3 debtors. The common incorrect approach is to define a selection set as follows:


Group	Field	Heading	Rel	Value
.	2	. Debtor Code	eq.	cus1
.	2	. Debtor Code	eq.	cus2
.	2	. Debtor Code	eq.	cus3
.



Even though transactions may exist for the above 3 debtors, nothing will be selected as by default Selection Sets invoke the *AND* condition. The *AND* condition selects only records where all the above conditions are true. It is impossible for one single debtors transaction to belong to all debtors cus1 *and* cus2 *and* cus3. A transaction can only belong to one debtor code.

The correct Selection Set is as follows:


Group	Field	Heading	Rel	Value
A	. 2 .	Debtor Code	eq.	cus1 .
A	. 2 .	Debtor Code	eq.	cus2 .
A	. 2 .	Debtor Code	eq.	cus3 .
.



The common label “A” in the Group column on each line invokes the *OR* condition between those lines. It is not significant that the letter A is used, but that a common label is used in the first 3 lines. For example you could use a label of Broncos on the first 3 lines and it would work equally well! This invokes the *OR* condition i.e. if the transaction belongs to debtor cus1 *or* cus2 *or* cus3 then it will be selected.

Additional lines can be added:

Group	Field	Heading	Rel	Value
A	. 2 .	Debtor Code	eq.	cus1 .
A	. 2 .	Debtor Code	eq.	cus2 .
A	. 2 .	Debtor Code	eq.	cus3 .
.	. 4 .	Type	eq.	IN .
.	. 3 .	Accounting Period	le.	200601 .

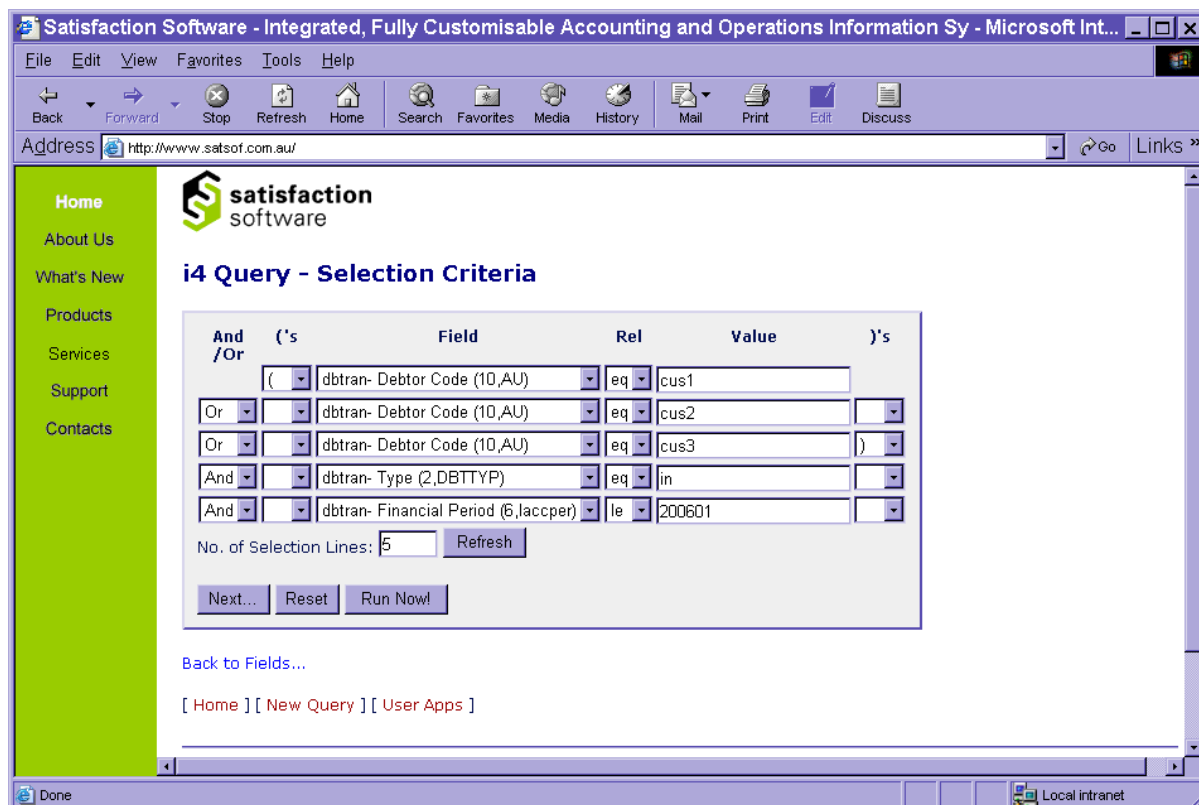


The above selection set then says ‘must belong to either of the 3 customers AND must also be an invoice type and the accounting period must be less than or equal to 200601’.

Handy Hint
 As a simple rule for introductory learning, you enter a common label in the group column when you have multiple values equal to (eq) the same field number.
 Do not use the same multiple label for other relationships such as ne, gt, ge, lt and le.

This example or similar, is often raised during training and hopefully is of benefit to you.

The following is infoware’s Browser equivalent in the Advanced Selection option. This also applies to i4 Query (note the use of brackets to group the debtor codes):



Selection Sets in Data Processing

IMPORTANT: You can use selection sets for data entry as well as reporting.

ACCOUNT MAINTENANCE
Choose Record Operation
<ul style="list-style-type: none"> 1 - Record Number 2 - Scan For Records 3 - Add Records 4 - Index Selection 5 - Toggle Browse Mode Browse is OFF 6 - Fuzzy Search
<ul style="list-style-type: none"> X - Exit F10 - Help
Enter Selection > 1

Select 2 – Scan For Records:

Scan For Records
1 - Short Selection 2 - Extended Selection 3 - Clear Selection X - Exit F10 - Help
Enter Selection > 1

Select 2 – Extended Selection

A selection set screen will appear.

For example, if you wish to review and possibly remove debtors on stop credit flag, you would select:

Debtor Account Maintenance {2,1};

2 – Scan for Records;

2 – Extended Selection;

then enter “U”pdate a selection set screen as follows:

Group	Field	Heading	Rel	Value
.	56	. Credit Stop	.	Y.
.
.
.

Press [Esc] [Esc] and then the [Enter] key and infoware will bring up the first debtor on stop credit. If you wish to take it off stop credit, you can update, perform your edit and press [Esc] [Esc].

To bring up the next record, press the [Enter] key. Do not press the [Up] or [Down] arrow key as this will physically bring up the next record in the database. You can also press B – Browse to browse through the list of matching records.

3. Browse Formats

Browse formats are displayed in data entry. An example of browse format is as follows:

Br Code	Name	Suburb	PC
B2 BELMONTL39	J & J McPherson		4159
B2 CABOOLTURE	Queensland Capital Corporation	Brisbane	4000
B2 CALOUN2213	Caloundra Christian College		4551
B2 CAMPHI3203	Brisbane Housing Company Limit		4001
B2 CLAYFI3201	Merityard P/L As Trustee For M		4568
B2 COOMER2217	D And B Morris	Tingalpa	4173
B2 CSRFC	CSR Fibre Cement		4108
B2 DEAGON1213	Great Northern Developments Pt	Spring Hill	4000
B2 DHA	DEFENCE HOUSING AUTHORITY	YAMANTO	QLD 4305
B2 EASTBR2209	Property Resources Australia D	South Brisbane	4101
B2 FITZGIBBON	Evergreen Property Development		
B2 FOREST2212	Defence Housing Authority	ACT	2600
B2 GOLDEN	GOLDEN EDGE HOMES	GOLD COAST MC	QLD 9726
B2 GRACE01215	The Corp. Of The Trustees Of T	Graceville	4075
B2 HAMILTON	K & G Gillet	Qld	4007
B2 HAMILTON2	K And H Hubinger		
B2 HAMILTONRE	Dr A Gillet	Qld	4007
B2 HEMBRO	Hembrow's Electrical	UNDERWOOD	QLD 4119

—Index—
 ARROWS -Change Record, Enter -Select Record, U -Update Record
 S -Set Selection, Z -fuzZy search, R -Reset C -Continuous On
 F -Format, H -Hardcopy, X -Exit

When you are in browse mode, you can change the format of the data being displayed. To do this, first be in browse mode (as per above example).

Then select F – **Format**.

Then select U – **Update** and change the browse format, adding or deleting fields that you like.

The restrictions are:

- Each field must be prefixed with an asterisk to denote that it is a field number.
- A maximum of 80 characters per record.
- It is recommended to leave one space between fields, although sometimes you may have to truncate fields to display other fields as well.
- You can only show fields within the current file – you cannot show fields from other files. For example, if you have a browse format searching Debtors Transactions, you cannot show the name, phone number or account balance as this is stored in a separate file (being the Debtor Master File).

If you wish to change the above browse format, then you would type U – Update and then you can use your [F1] – Insert character key and [F2] – Delete character key to change the format as you like.

Fields available will appear on the top of the browse format. [Page Up] and [Page Down] keys will show more fields. If you wish to know what length and type each field is (e.g. numeric, alpha, date etc.), this can be shown by pressing the [F5] key.

Br Code	Name	Suburb	PC
1-	Contact Reference	6-	Account Balance
2-	Debtor Name	7-	MTD Sales
3-	Mail Suburb	8-	YTD Sales
4-	Mail Post Code	9-	Branch
5-	Credit Limit	10-	Debtor Code
		11-	Terms of Trading
		12-	Temporary A/c
		13-	Group Code
		14-	Delete A/c Flag
		15-	Mailing List Code
Browse Header:			
Br Code	Name	Suburb	PC
*9 *10	*2	*3	*4

[Esc] [Esc] to complete a temporary change of the browse format.

To see how the browse format appears, then just simply press the [Enter] key and the new format will appear.

DO NOT forget to change the Browse Header as well if you change the Browse Format.

To save the browse format and give it a name, type:

F – Format

S – Save

Enter the specific name that you wish.

Handy Hint

The browse format *default* (lowercase) is the “default” browse format for everyone who accesses the specific file. Therefore if you change the browse format called “default” it will apply to all users.

To retrieve a previously loaded browse format, in the browse format screen type:

F – Format

L – Load

Select the browse format from the list and then press the [Enter] key twice.

4. System Maintained Fields

There are special fields that you can use, both in selection sets and browse formats. They are as follows:

@cb	Created By	The name of the user who created this record.
@ub	Updated By	The name of the user who last updated this record.
@cd	Creation Date	The date that the record was created (In format mm/dd/yy).
@ud	Update Date	The date that the record was last updated (In format mm/dd/yy).

NOTES:

- (1) @cd and @ud are in mm/dd/yy format e.g. 31st March 2006 is 03/31/06.
- (2) Transaction files are created by confirmation programs. Therefore the @cb and @cd variables for transactions created by confirmations will be the user who confirmed the work files, not the user who entered the original transaction.

For example, Fred entered the banking transaction. Mary confirmed them. The debtor transactions will have the @cb=Mary and the date that Mary confirmed the transactions.

Other files, such as Debtor Master Files that never change will have the user who initially entered them and the date maintained.

System Maintained fields can be used in both Selection Sets and Browse Formats.

--- END OF DOCUMENT ---