# NorthClark Computing, Inc.

# Codes Administration

# User Guide

## Web and Desktop Applications
## for Manfact by Epicor

**July 1, 2007**

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## Introduction

The Codes Administration procedure allows you to create tables of codes and descriptions for Buyers, Planners, Part Categories, and Part Type Codes. These tables are used by various NorthClark applications to provide convenient drop-down lists for the user to select from during data entry.

## Codes Administration Screen

Begin by selecting the Table you wish to update from the drop-down list:
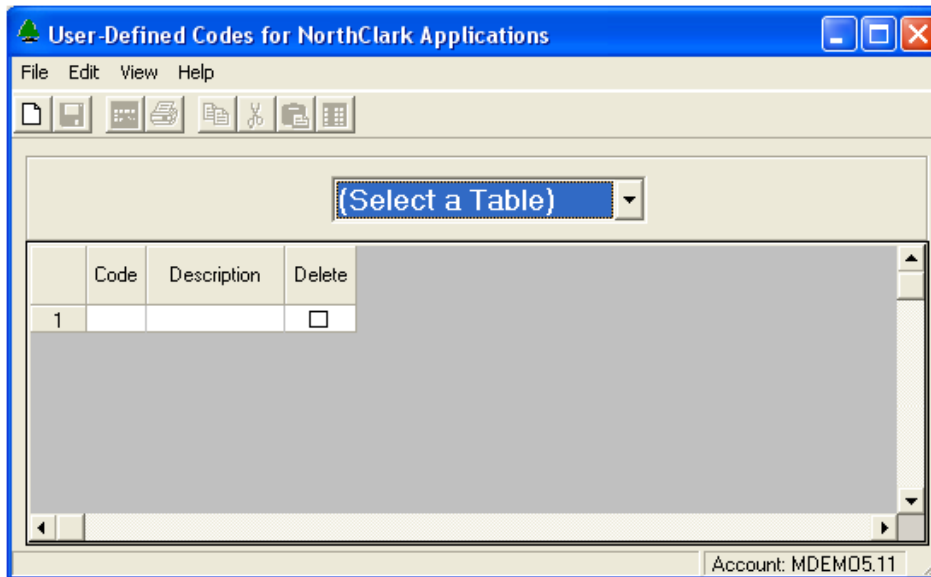


Any existing records are displayed on the spreadsheet:

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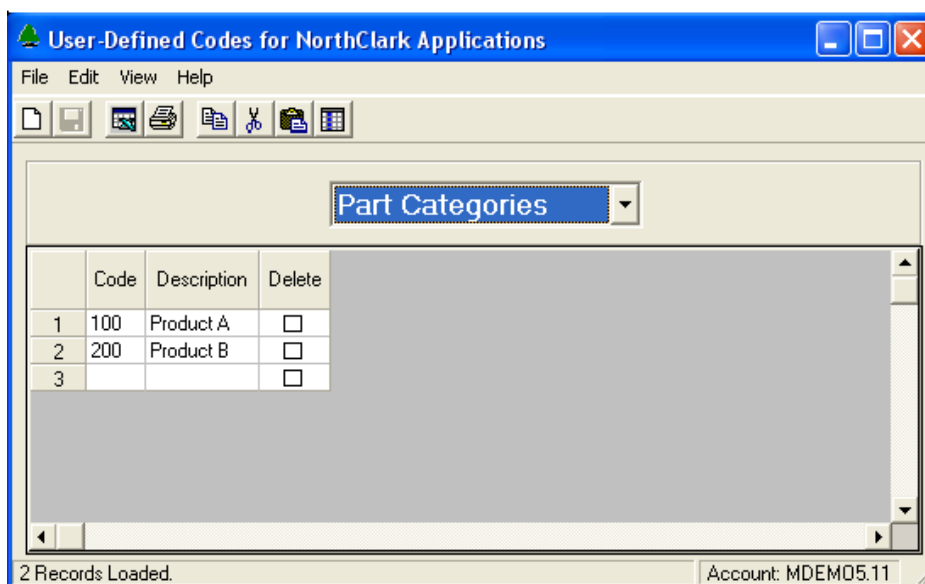
To define a new Code, simply type the information in the last (blank) row of the spreadsheet.  To delete an existing code, click the checkbox in the last column as shown here:
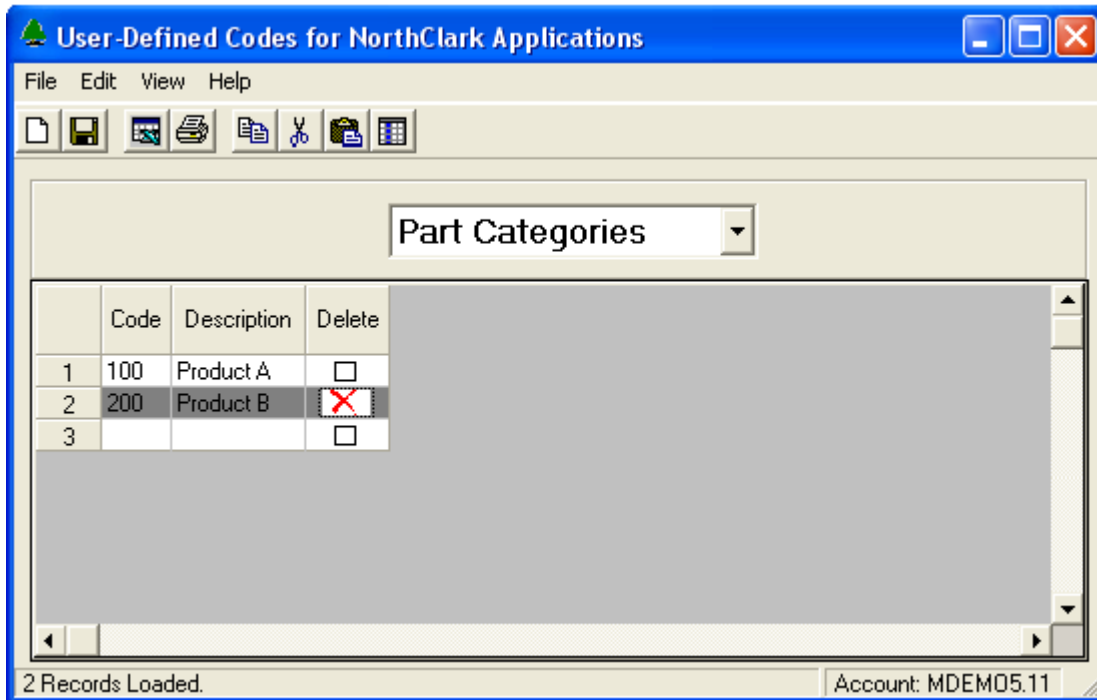


Once you are satisfied that all of the codes have been added, modified, or deleted, select the *Save* option from the *File* menu to post your changes to Manfact.

## Main Menu Options
Following is a brief description of the options available from the Main Menu of the Codes Administration application.

| Menu | Option | Description |
|------|--------|-------------|
| File | Clear | Clear all current data on all displays. |
|      | Save | Save your changes to the database. |
|      | Print | Print the current active spreadsheet. |
|      | Import | Import data from Excel to populate the active spreadsheet. |
|      | Export | Export data from the active spreadsheet. |
|      | Exit | Close the application |

| Menu | Option | Description |
|------|--------|-------------|
| Edit | Copy | Copy data to the Windows clipboard. |
|  | Cut | Cut data from the field and copy it to the Windows clipboard. |
|  | Paste | Paste data from the Windows clipboard. |
|  | Fill | Update all of the selected cells from the Windows clipboard. |
| View | Auto Fit Columns | Automatically adjust the width of each column to accommodate your data. |
|  | Unhide All Columns | Expose all columns previously hidden. |
|  | Hide Deleted Rows | Hide rows that have been marked for deletion. |
|  | Display Options | Set user preferences affecting the appearance of the screen. |

## Right Click Menu

| Option | Description |
|--------|-------------|
| Copy | Copy data to the Windows clipboard. |
| Cut | Cut data from the field and copy it to the Windows clipboard. |
| Paste | Paste data from the Windows clipboard. |
| Fill | Update all of the selected cells from the Windows clipboard. |

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# General Information

## Printing a Spreadsheet

Below is a sample of the screen that will appear when you select the **Print** option.  This will print the current active spreadsheet, so be sure to click on the spreadsheet you wish to print before choosing the Print option.
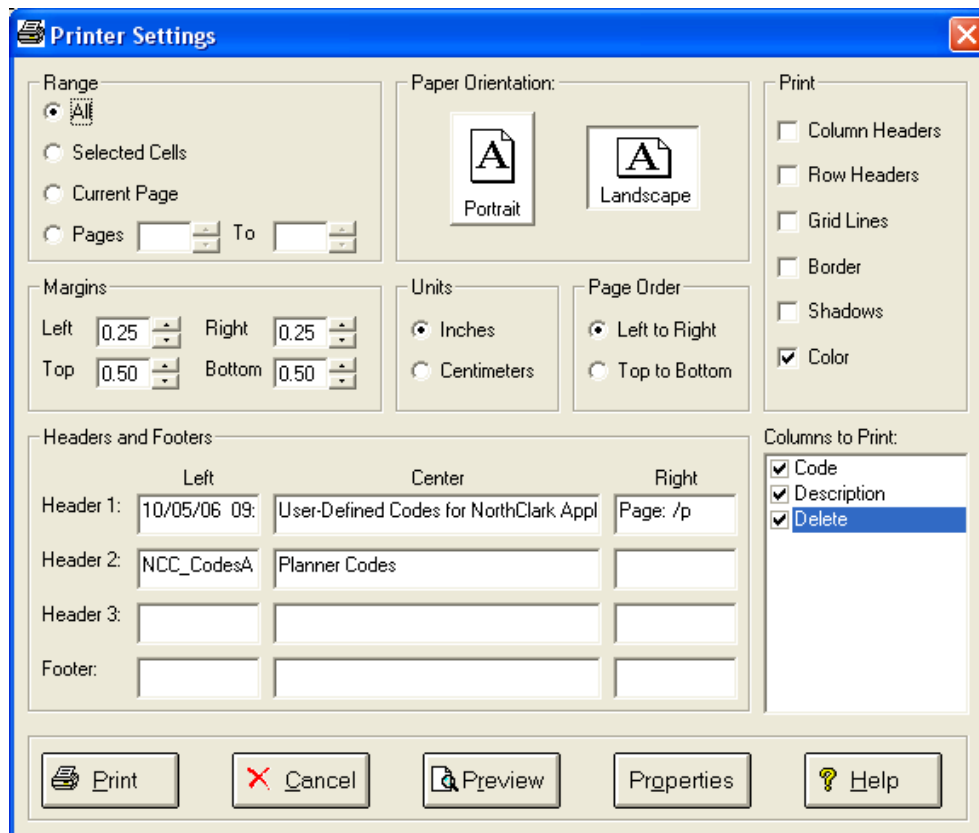


### *Range - Selecting a Print Range*

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.

## Importing Data from Excel

This screen below is displayed when you choose the option to Import data from a Microsoft Excel spreadsheet, a tab-delimited text file, or a comma-separated text file. The data will be imported to the current active spreadsheet, so be sure to click on the desired spreadsheet before choosing this option.
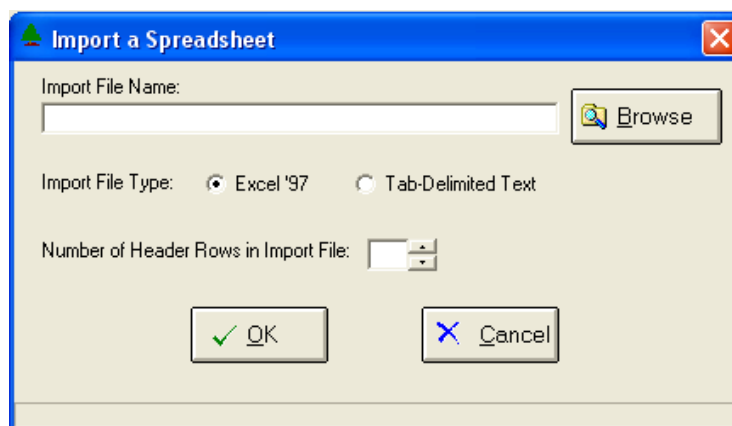


### *Import File Name*

Enter the path for the file that you wish to import.  You may browse the files by clicking on the button next to the text box.

***Import File Type***
Select the type of file that you are importing

***Header Rows***
Enter the number of rows at the beginning of the file that are not to be imported

***Import Data***
Click [OK] to begin the import procedure.

## Exporting a Spreadsheet to Excel

Below is a sample of the screen that will appear when you select the **Export to Excel** option.  This will export the current active spreadsheet, so be sure to click on the spreadsheet you wish to print before choosing the Export option.
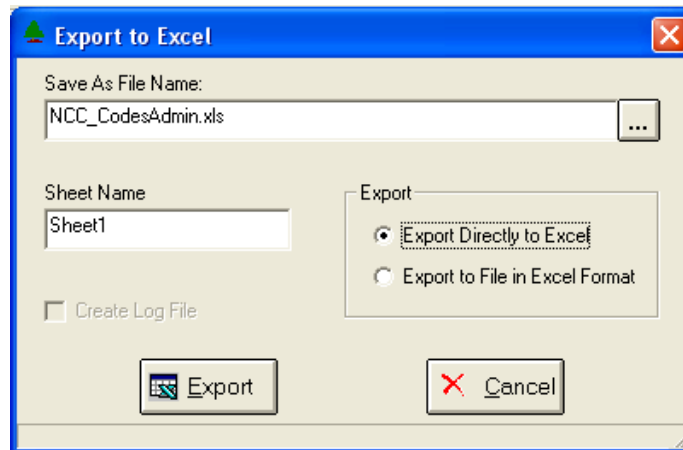


***Save As File Name***
Enter the pathname of the file you wish to create.  You may **Browse** the files by clicking the button to locate the drive and folder where the file will be stored.

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

***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.

***Create a Log File?***
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.

*[Export] Button*

>   After all required information has been entered, click this button to export your data to Microsoft Excel.

## Editing Features

### *Copy, Cut, Paste and Fill*

You may use the standard Windows Copy, Cut, and Paste features to copy data to the Windows clipboard, or to paste data from the clipboard into a cell.

To copy data, hold down the left mouse button and highlight one or more cells, then choose **Copy**.

There are multiple ways to enter this command:

- ❑ From the **Edit** menu choose **Copy**.
- ❑ Click the **Right Mouse** button, and then choose **Copy** from the pop-up menu.
- ❑ Click the corresponding icon on the toolbar.
- ❑ Hold down the **Ctrl** key and type the letter **C** (**Ctrl-C**).

You can use the Cut command (Ctrl-X) and the Paste command (Ctrl-V) in similar fashion.
To copy the contents of an entire row, click once on the row header (the number displayed on the left side of the first cell), and then choose **Copy**. Now click on the row header that you want to copy the data to and choose **Paste**.

If you want to update several cells with the same value, highlight all of the cells you wish to update then choose **Fill Cells**. This command will update each cell with the current information from the clipboard.

### *Zoom*

This feature allows you to view, print and/or edit the expanded contents of a field.  It is especially useful for multi-line information such as notes and long descriptions.

- You may "Zoom in" on any selected item by selecting Zoom from the Edit Menu, clicking the magnifying glass on the toolbar, or selecting Zoom from the right click menu.

- The Column Name will appear in the Title Bar with "Edit" or "View".  You may edit the field when it is allowed.   Click "**OK**" when finished, or "**Cancel**" to revert to the original data.

- To print the selected item, click on the printer icon and the information will be sent to your local printer.

Locked fields may be viewed but not modified using the Zoom Feature.  If the field is locked, "**View**" will appear in the Title Bar, and there will only be a single command button labeled "**Done**".

## Customizing Your Display / Arranging Columns

Use the Customize Display Screen to make the following changes:

❑ Each tab contains a list of fields that corresponds to a screen used in this application. Use the checkboxes to show or hide each field.

❑ Use the [Move Up] and [Move Down] Buttons to re-arrange the order in which the fields appear on the specific screen Display. Click [Reset All] to return to the system's default settings.

❑ Select the color to use for highlighting Rows that have been modified, during data entry, but not saved. When you click the [Select Color…] button, a dialog is displayed allowing you to select a color palette.

❑ You may opt for the system to "Remember Screen Size and Column Widths". Any changes you make to the screen's appearance will be saved and applied the next time you launch this application.

❑ Choose the number of columns (from left to right) you wish to *freeze* on the spreadsheet. A frozen column will remain in place as you scroll to the right.

❑ Click [OK] to apply any changes you have made or [Cancel] to revert to the previous settings.
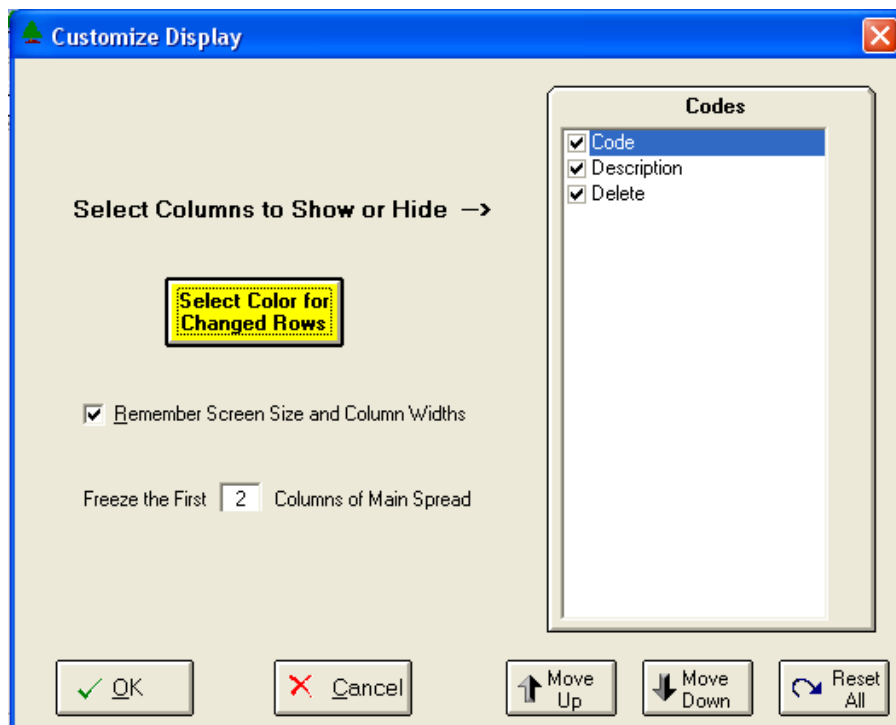


Note, these settings are stored in the Windows Registry for each user.

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## Wildcarding

Wildcarding is a powerful feature that allows you to search using a portion of the field. You tell the system you want to use a wildcard by typing three periods "…" or an asterisk "*" at the beginning or end of your search entry. Here are some examples of wildcard commands and their expected results:

| Prompt | User Entry | Result |
|---|---|---|
| Part No. | XTR… or XTR* | Returns part numbers that begin with "XTR" |
| Description | …VALVE… or *VALVE* | Returns parts with the word "VALVE" anywhere in the description. |
| Category | …A or *A | Returns parts with a category ending with the letter "A". |