



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

NorthClark Computing, Inc.

Data Warehouse Management User Guide

Web and Desktop Applications
for Manfact by Epicor

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Introduction

The Data Warehouse Management application (NCC_DWM) provides a convenient way to view, update, and print files within the various *Data Stores* utilized by the NorthClark system. Data Stores may contain virtually any type of electronic file, including drawings, images, documents, and spreadsheets. The Data Stores currently supported by this application include:

Data Store Name	Description
BWB_CONFIRM	Purchase Order Delivery Confirmation Requests are maintained by the NorthClark application, NCC_POConfirm. Information is organized by Supplier Number.
BWB_NCCAN	Non-Conforming Material / Corrective Action Notices are maintained by the NCC_NCCANEntry application. Information is organized by Purchase Order Number.
BWB_PO	Purchase Orders are maintained using the NorthClark Buyer's Workbench (NCC_BWB). Information is organized by Purchase Order Number.
BWB_QCD	Supplier Performance Messages are generated by NCC_QCDMsgs, and are organized by Supplier Number.
BWB_RFQ	Requests for Quote are maintained using the NorthClark Buyer's Workbench (NCC_BWB). Information is organized by RFQ Number.
BWB_SAMPLES	Sample Requests for Quote are maintained using the NorthClark Buyer's Workbench (NCC_BWB). Information is organized by RFQ Number.
PARTS	The Part / Bill of Material Data Store is accessed by various NorthClark applications, including Buyers Workbench (NCC_BWB) and Bill of Material Entry (NCC_BomEntry). Information is organized by Part Number.
PROJECT	Information in this Data Store is organized by Project Number.
SO	Information in this Data Store is organized by Sales Order Number.
QA	Quality Control Specifications are organized by Part Number.
NMR	Non-Conforming Material Reports are organized by QA Number.

Application Mode vs. Command Line Mode

You may launch NCC_DWM from your computer's Start menu or desktop, as you would any Windows application. This mode of operation is called *Application Mode*. From the Main Screen, you can select

the Data Store you wish to open, enter the appropriate Record Identifier (Supplier, PO, RFQ, Part, Project or Sales Order Number), then view/update the contents of the Data Store for the specified item.

If your Security Privileges permit, the System Administration screen may be accessed while in Application Mode. This view is used to enter the pathnames to all your company's Data Stores.

Command Line Mode allows other NorthClark and Manufact applications to invoke the Data Store View. The calling program passes the Data Store Name and Record Identifier. In this mode, the Main Screen is bypassed, and the Data Store contents for the requested Record Identifier are immediately displayed.

Command Line Mode allows the DWM module to be easily connected to existing applications using simple executable commands. You may also invoke this mode directly from a Universe prompt. For example, the command:

```
> NCCVB DWM_PROJECT 100
```

...will invoke the Data Store View and display the contents for Project Number 100.

Note that the System Administration screen must be updated in Application Mode before using the Command Line feature.

Data Store Notes

To help facilitate communication between Associates, the system maintains a Notes file for each item in the Data Store. The Windows Text file is easily modified using your favorite text editor, such as Notepad. Notes are free-form, and are visible on the Data Store View.

Data Store Structures

Buyer's Workbench

All of the BWB Data Stores are created by the Buyer's Workbench, and their structure cannot be modified. Other Data Stores have some flexibility, within certain parameters.

Parts and Bills of Material

There are two different methods of organizing information within the Parts and Bill of Material Data Store. It is also possible your company is using a combination of these two methods:

- Create a Folder with the same name as the Part Number. Store all files associated to the Part in the designated folder (preferred method).
- Part information is not segregated into Folders. Files must be identified based on naming conventions. Each file name must contain the Part Number, and optionally the Revision Level.

Sales Orders and Projects

The Data Warehouse Management program creates a Folder for each Sales Order or Project, directly under the Root folder.

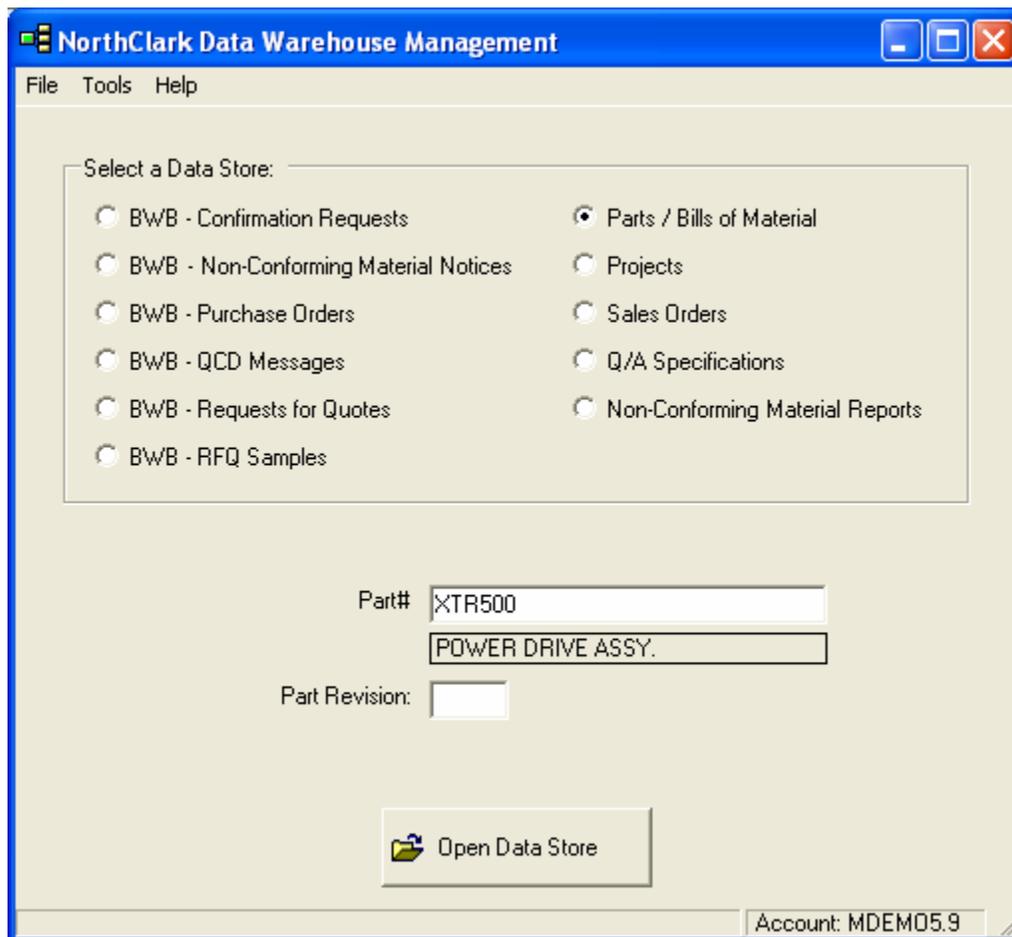
Multiple Data Stores and Sub-Directories

Parts, Projects, and Sales Orders may be organized into multiple Data Store locations, and may have sub-folders. Please refer to the System Administration section for more details.

Data Warehouse Management

Main Screen

This view is available only when the program is invoked from your Start menu or desktop (Application Mode).



Begin by selecting one of the Data Stores to open. Note, if an option is disabled, it means the program cannot access that particular Data Store. This may be because the System Administrator has not yet defined the Data Store locations, or because you do not have Windows Security Privileges to access a particular Data Store.

Next, enter the Record Identifier. Depending on the Data Store you selected, you will be prompted for one of the following: Supplier, PO, RFQ, Part, Project, Sales Order Number or QA Identifier. Upon valid entry, a Description is displayed underneath the Record Identifier. The Description will be either the Supplier Name, RFQ Description, Part Description, Project Description, Customer Name or Part Number.

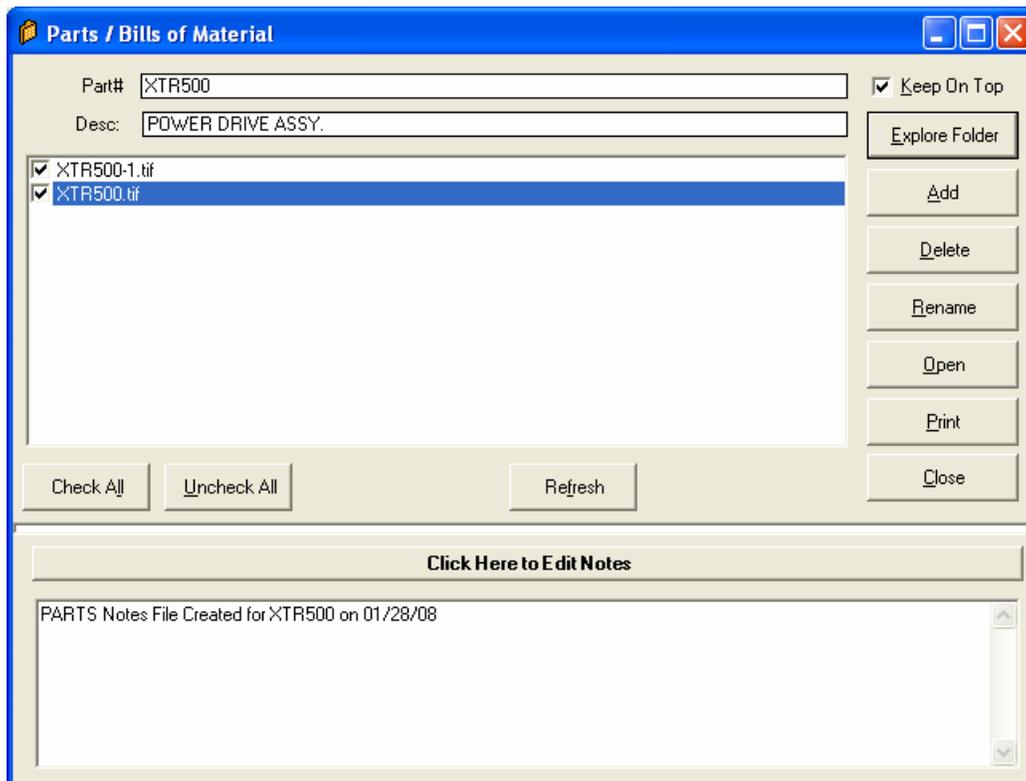
If you are viewing the Parts / Bill of Material Data Store, you may optionally enter the Part Revision Level. This is required only if your drawing file names include the Revision Level, and you wish the results to be filtered by Revision Level.

Click the [Open Data Store] button, and the Data Store View Screen is displayed.

Data Store View

This screen is used to view/update the contents of the Data Store for a selected Record Identifier. You may have arrived here from the Main Screen if using Application Mode, or you may have been routed here directly by another NorthClark or Manfact application.

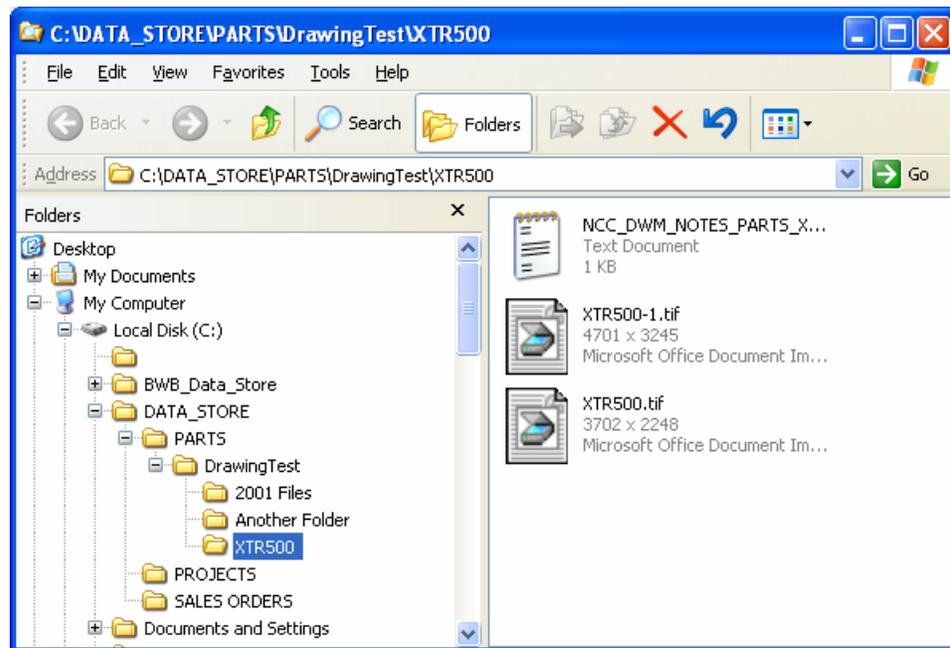
This example illustrates a view of the Parts Data Store for Record Identifier: XTR500. Note that with the exception of the titles, the format of this screen, and the options available, are the same for all Data Stores.



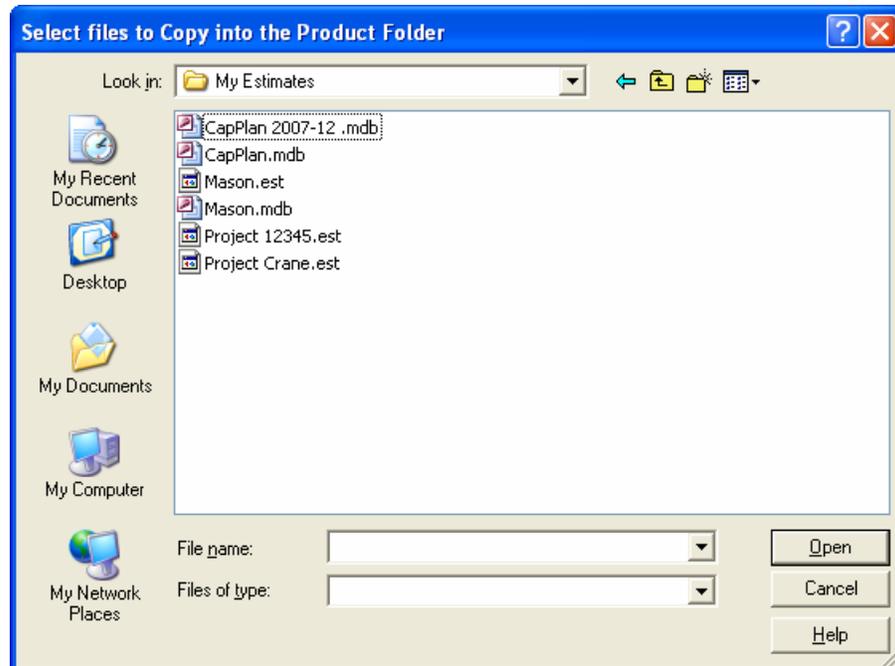
Information on this Screen:

- Record Identifier - Supplier, PO, RFQ, Part, Project, Sales Order or QA Identifier.
- Description - Supplier Name, Description, Customer Name or Part Number

- File List - A list of files currently contained in this Data Store is displayed. Use the checkboxes to select multiple items to Open, Print, or Delete.
- Keep on Top - Check this box to keep the Data Store View on top of other Windows on your desktop, so it stays visible.
- Explore Folder - Click this button to launch an instance of Windows Explorer, open at the current Data Store Folder. If desired, you can copy/paste or drag-n-drop to copy files from the Explorer Window to the Data Store View File List. This option is recommended for advanced users.



- Add - A dialog is displayed allowing you to browse your computer network for files to be added to the Data Store.



- Delete
 - Choose this option to delete one or more selected files. Note, when a file is deleted from the Data Store, it is moved to a folder called “Backup Files” where it may be retrieved using Windows Explorer, if needed. The name of the file will be changed to reflect the date and time it was saved, so multiple copies of the same file may exist in Backup Files.
- Rename
 - Choose this option to Rename the *highlighted* file. A box will be displayed allowing you to edit or type over the existing file name.
- Open
 - The program attempts to open the selected file(s) by launching the application associated with the file extension.
- Print
 - The program attempts to print the selected file(s) by launching the application associated with the file extension.
- Close
 - Closes the Data Store View. In Application Mode, user is returned to the Main Screen. In Command Line Mode, the program terminates.
- Check All
 - Selects all the files in the list.
- Uncheck All
 - Deselects all the files in the list.
- Refresh
 - Redisplays the file list and Notes with currently information from the Data Store folder.
- Splitter Control
 - The white horizontal bar in the center of the screen allows you to adjust the size of the top and bottom panels.

- Edit Notes - Click this button to edit the Notes file for this Data Store. If the text file does not exist, the program will create it automatically.
- Notes Display - The system displays the Notes from the text file.

How the System Locates a Data Store

The System Administrator defines one or more Root Folders for each Data Store. When you attempt to open a Data Store for a particular item, the application searches each of the Root Folders looking for a Folder with the same identifier (Part#, Project#, etc.) as the item you requested.

When searching the Parts Data Store, if a matching Folder is not found, the system will attempt to locate files where the filename matches the Part Number. Note, this does not apply to any other Data Store. When a matching file is found, the Folder it resides in is considered to be the Data Store for that Part Number. When the Data Store is viewed, the results are filtered so only those files matching the Part Number are displayed.

For the system to successfully locate files by Part Number, the filename must be the Part Number, or the Part Number followed by “_” and the Part Revision Level, with any file extension. Following are examples of valid file names for Part “XTR500”:

- XTR500.PDF
- XTR500.DWG
- XTR500_A.TIF

As a reminder, naming conventions are *not* a consideration when a Folder is created for the Part Number. Please contact NorthClark Computing if you need customization to accommodate legacy Data Stores.

If a Data Store cannot be located for the item, the following prompt is displayed:

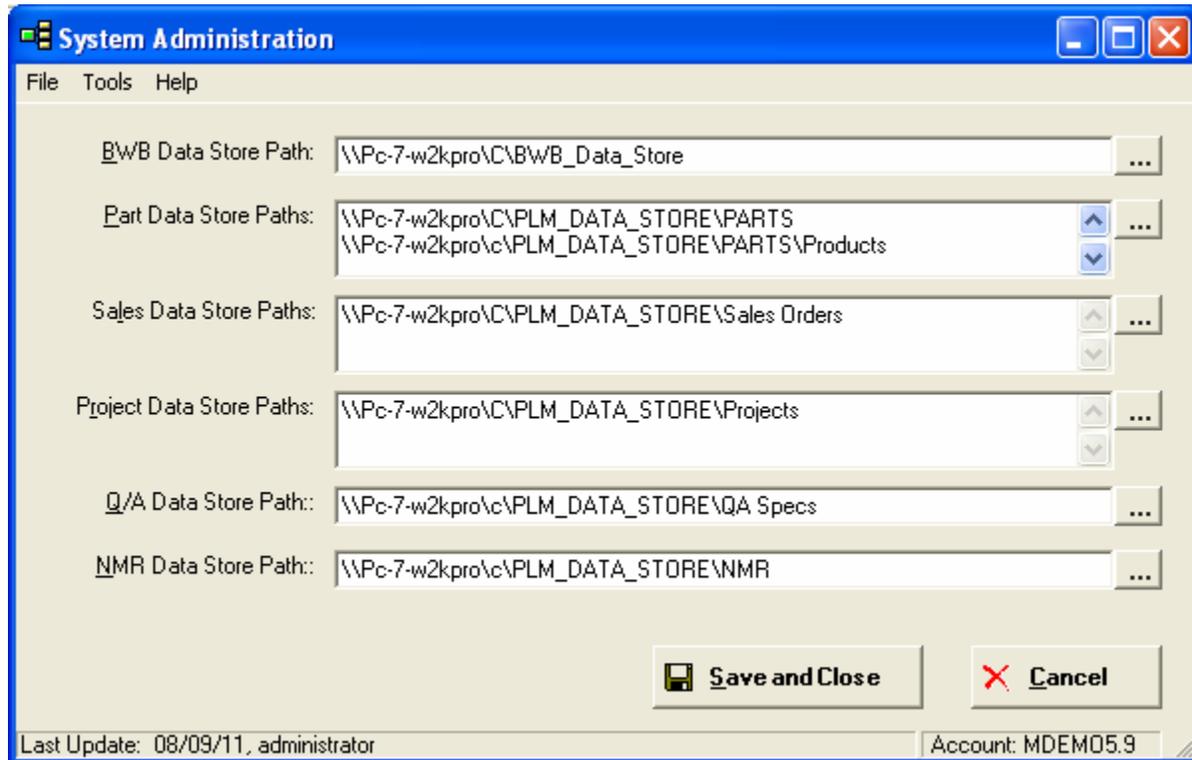


The system will create the new Folder, and you can begin moving your files into it.

System Administration

Defining Data Store Locations

As the System Administrator, you may want to provide access to existing Data Stores, or you may be setting up a new Data Store. This screen allows you to enter the pathnames to the “root” folder(s) for each Data Store.



Universal Naming Conventions

Note that you are entering this information for all users of your Manufact system, so the pathnames must be valid from any network location. It is usually best to reference the computer name, as opposed to a local driver letter, when defining folder paths.

BWB and BOM Administration Screens

As of this writing, it is necessary to enter pathnames using NCC_BWBAdmin for Buyer’s Workbench and NCC_BomSetup for Bill of Material Maintenance. These same pathnames must be entered again using NCC_DWM. In the near future, all pathname maintenance will be accomplished using only NCC_DWM.

Multiple Pathnames

The Parts, Project, and Sales Order Data Stores allow you to have multiple Root Folders. This allows you to break-up a particularly large Data Store into multiple sub-stores. For example, you might have

one Folder for “Active Projects”, and another for “Archived Projects”. When searching for a Data Store item, the system will search each Root Folder in the order listed.

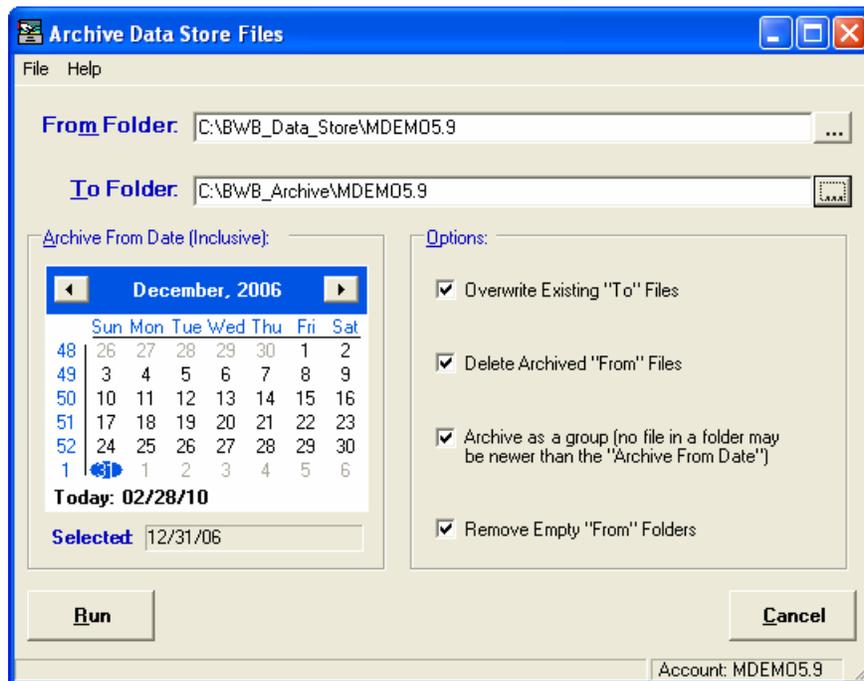
When DWM creates a new Folder for a Part, Project, or Sales Order, it will always place it in the first directory listed. So, having multiple pathnames is only useful for including secondary Root Folders that you have created manually.

Where Are Pathnames Stored?

The System Administration screen updates a record named “NCC_DWM” in Manfact’s TABLE file.

Archiving Data Store Files

The Archive feature allows you to remove obsolete files from your Data Stores and move them to another location on your network. This option is available from the Tools menu located on the System Administration screen. **Be sure to have a reliable system backup before attempting to archive data.**



From Folder

Begin by entering the pathname to the Data Store you wish to archive, or use the browse button to locate the folder on your network. It is recommended that you browse to the *Account Name* level as shown in the above example. In this illustration we are archiving the MDEMO5.9 account. The actual Account Names on your system will be different. Examples of names commonly used by Manfact customers include: MANLIVE, MANTEST, etc. Browsing to the Account Name level avoids archiving permanent records such as those located in the “Company Documents” folder of the BWB Data Store.

To Folder

Enter the location on your network where the files will be copied. If the folder does not exist, the system will prompt you to create it:



Archive From Date (Inclusive)

Use the calendar to select a cut-off date. All files with a date on or before the specified date will be eligible for archiving.

Overwrite Existing "To" Files

Check this box to overwrite any files that may already exist in the Archive directory. This situation may occur if you have previously archived data with the "Delete Archived From Files" option turned off.

Delete Archived "From" Files

Selecting this option will allow data files to be deleted from the Data Store once they have been successfully copied to the Archive folder. For testing purposes, you may wish to uncheck this box to see which files will be moved, without actually deleting them.

Archive as a Group

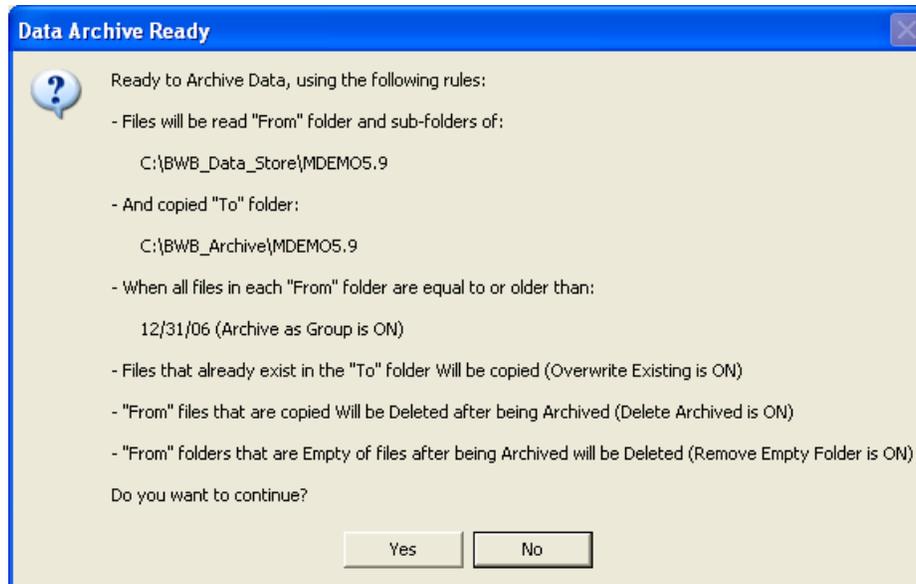
When this option is checked, all data files contained in a given folder must qualify to be archived, otherwise none of the files in the folder are moved. This is useful for keeping related records together. For example, in the BWB Data Store, a separate folder is created for each Purchase Order. If any of the data files in a folder are newer than the cut-off date, none of the records associated with the Purchase Order will be archived.

Remove Empty "From" Folders

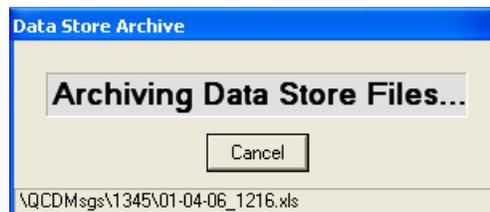
This option should normally be checked to allow deletion of empty sub-folders within the Data Store.

Ready to Archive

Once all of the desired options have been chosen, click the [Run] button, and the following screen is displayed:



Review your selections, then click [Yes] to start the process. A message is displayed allowing you to monitor its progress. Click the [Cancel] button if you wish to stop the process.



Upon completion, a message is displayed with various statistics, including the number of files and directories that were successfully moved.

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_DWM	Allows access to DWM in Application Mode.
NCC_DWM_ADMIN	User has access in Application Mode, and can also access the System Administration screen.

Data Store Security

It is important to secure your company's Data Stores using Windows File Permissions. Note that the application does not establish a Manfact connection and does not check Manfact Security when in Command Line Mode. Each user's ability to view/add/delete files will be determined by their Windows Security Privileges.



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