



CHANGE TRACKING

User Setup Guide

VERSION 1.0.0.0

Contents

- SETUP** 2
 - Change Tracking Wizard** 3
 - Change Tracking License Setup**..... 5
 - Change Tracking Setup**..... 8
 - Change Tracking Table Setup**..... 10
 - Condition Table Filter**..... 14
 - Table Filter** 17

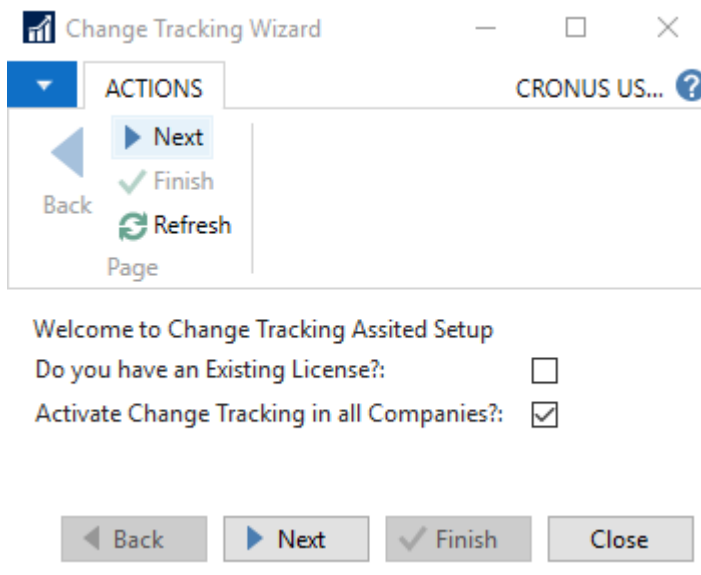
SETUP

There must be some initial setup done before Change Tracking can be used. To access the Menu suite for Change Tracking from the administration menu, expand **Departments**→**Silverware Change Tracking**.

Change Tracking Wizard

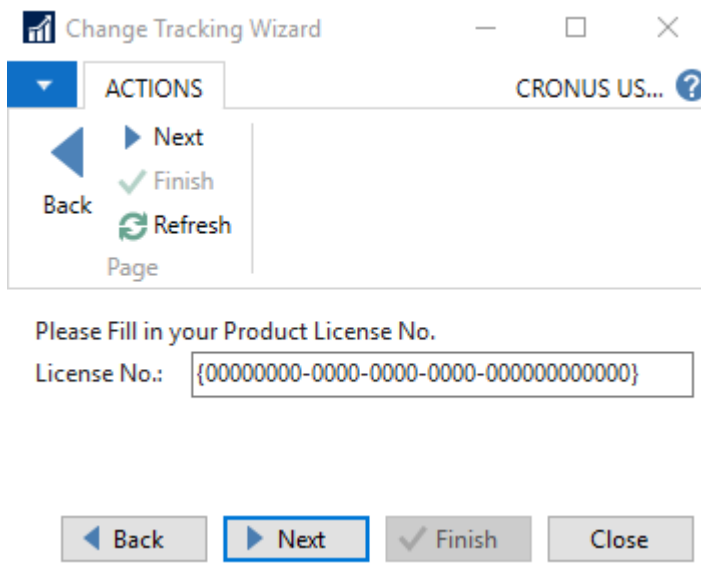
The change tracking wizard allows for an assisted setup that walks through the initial process needed to set up the License. To access the assisted setup, go to **Departments→Administration→Application Setup→General→Assisted Setup**, then select the record titled **Set up Change Tracking**. The following will walk you through each screen.

1. Determine if you would like to activate Change Tracking in all Companies and if you have an existing License No. To continue press **Next**. If you do not have existing license, skip to step 3.



The screenshot shows a window titled "Change Tracking Wizard" with a standard Windows title bar. Below the title bar is a navigation pane with a dropdown menu set to "ACTIONS" and a search field containing "CRONUS US...". The actions list includes "Next", "Finish", "Refresh", and "Page". The main content area displays the text "Welcome to Change Tracking Assited Setup" followed by two questions: "Do you have an Existing License?:" with an unchecked checkbox, and "Activate Change Tracking in all Companies?:" with a checked checkbox. At the bottom, there are four buttons: "Back", "Next", "Finish", and "Close".

2. Fill in the existing License No. and press **Next**.



The screenshot shows the same "Change Tracking Wizard" window. The main content area now displays the text "Please Fill in your Product License No." followed by a text input field labeled "License No.:" containing the placeholder text "{00000000-0000-0000-0000-000000000000}". The "Next" button in the bottom navigation bar is highlighted with a blue border, indicating it is the active step.

- The Contact Information is filled in from the current user's User record, or User Setup if the information is not in the Users table. Company Address is defaulted from Company Information. Update and fill in the missing fields and press **Finish**.

Change Tracking Wizard

CRONUS US...

ACTIONS

Next
Finish
Refresh
Page

Back

Enter the Company and Primary Contact Information

Contact Information

Company Name: CRONUS USA, Inc.

Contact Name: John Smith

Contact E-Mail: JohnSmith@silverw.com

Contact Phone No.: 480-423-8324

Company Address

Address: 5664 E. Thomas Rd.

Address 2:

City: Phoenix

State: AZ

Zip Code: 85018

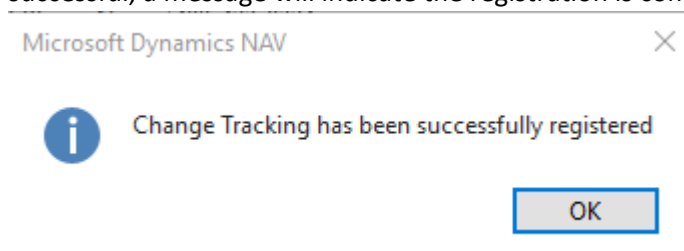
Country: US

E-Mail: admin@silverw.com

Phone No.: 480-423-8324

Back Next Finish Close

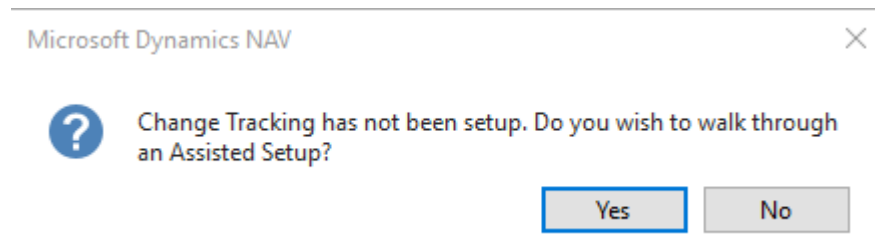
- A registration call is then made to create/update a license for the company. If the registration is successful, a message will indicate the registration is complete.



Change Tracking License Setup

License setup can be performed manually, if you do not wish to use the assisted setup wizard. Change Tracking License Setup is managed on a database level instead of a company level. To open the page, navigate to **Departments**→**Silverware Change Tracking**. Change Tracking License Setup contains all data that is used to activate the license, check on the license, and provide license information back to the table.

If this is a new Installation answer **Yes** and walk through the assisted Setup. This will assign a new License No. to the database.



General FastTab

Field Name	Description
License No.	The License No. will be assigned when walking through the wizard. If there is an existing License No., then it can be placed in the field and will validate when registering.
Active License	The Active License field is populated from registration. This determines if Change Tracking is active for the entire database.

License Expiration	The field is populated from registration and determines when the current license expires. If the field is past today's date, then Active License will be set to false.
Notification	The field is populated from registration, which will provide important information from Silverware Inc.

Company Information FastTab

Company Information	
Name:	CRONUS USA, Inc.
Address:	5664 E. Thomas Rd.
Address 2:	
City:	Phoenix
State:	AZ
Zip Code:	85018
Country:	US
E-Mail:	admin@silverw.com
Phone No.:	480-423-8324

Field Name	Description
Name	Company Name
Address	Company Address
Address 2	Company Address 2
City	Company City
Zip Code	Company Zip Code
Country	Company Country
E-Mail	Company E-Mail. License No. and important Information will be sent to this address.
Phone No.	Company Phone No.

Contact Information FastTab

Contact Information	
Contact Name:	John Smith
Contact E-Mail:	JohnSmith@silverw.com
Contact Phone No.:	480-423-8324

Field Name	Description
Name	Primary Contact Name
E-Mail	Primary Contact E-Mail. License No. and important Information will be sent to this address.
Phone No.	Primary Contact Phone No.

Modules FastTab

Modules

Basic Module: Advanced Module:

Field Name	Description
Basic Module	The field is populated from registration, which allows access to 25 Active Table Setup records to track history.
Advanced Module	The field is populated from registration, which allows access to unlimited Active Table Setup records to track history.

Page Actions

Edit - Change Tracking License Setup

HOME ACTIONS CRONUS USA, Inc. ?

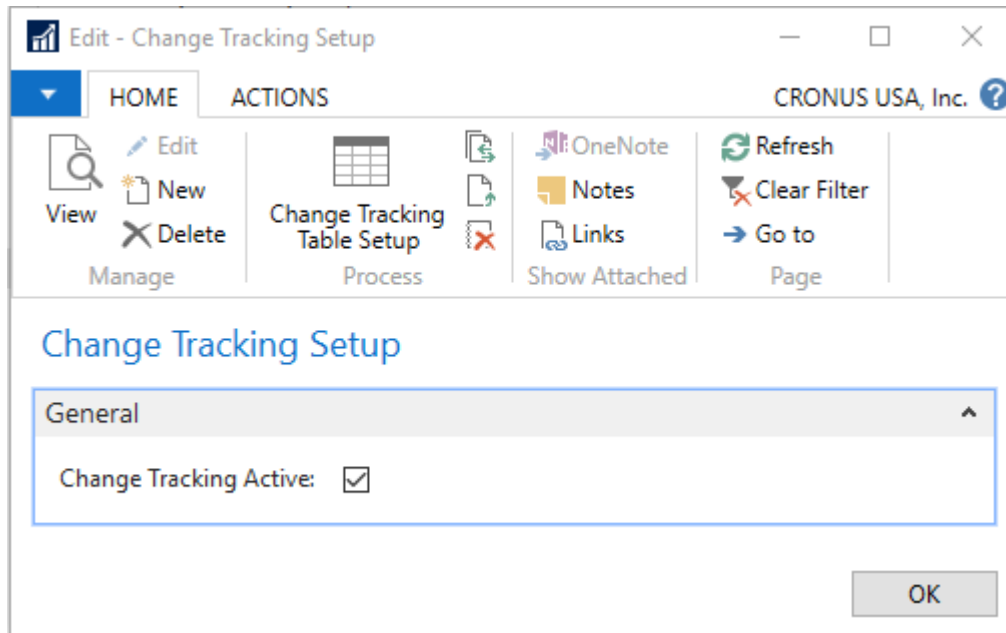
View Manage Edit New Delete License Registration Process OneNote Notes Links Show Attached Refresh Clear Filter Page Go to

Action	Description
License Registration	The action will send a manual registration call to check on a License and it will return a success or failure message.

Change Tracking Setup

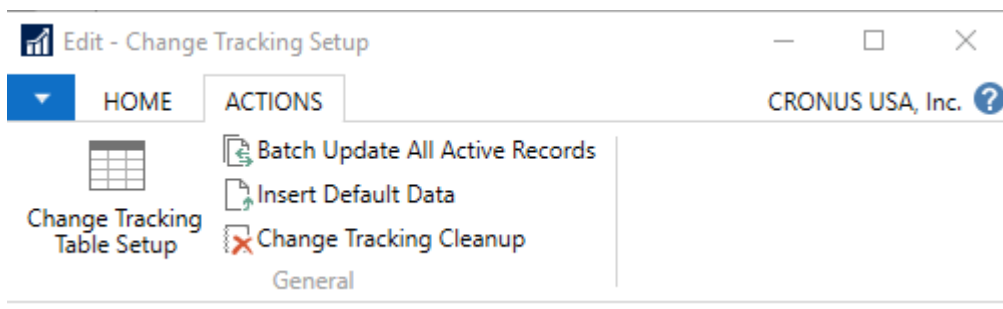
Change Tracking Setup manages the setup on a per company basis. To open Change Tracking Setup, navigate to **Departments**→**Silverware Change Tracking**.

General FastTab



Field Name	Description
Change Tracking Active	The field determines if Change Tracking is active for the current company.

Page Actions



Action	Description
Change Tracking Table Setup	The action opens the Change Tracking Table Setup page.
Batch Update All Active Records	The action batches updates of all active records on the Change Tracking Table Setup. WARNING: This action will lock tables, will take time, and should be run after hours.
Insert Default Setups	The action will insert and activate some suggested initial base records for Change Tracking, along with the Related Record Relations. Recommended to run on initial setup.
Change Tracking Cleanup	The action will purge data from the Change Tracking Record and the related Change Tracking Fields. This will always leave the last record that was changed for history.

Change Tracking Table Setup

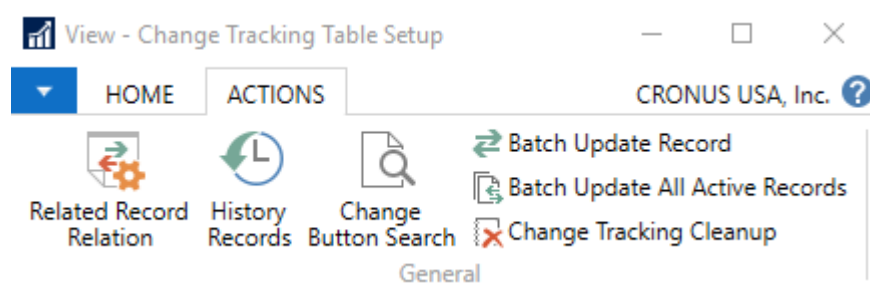
Change Tracking Setup manages the setup on a per company basis. To open the Change Tracking Table Setup, navigate to **Departments**→**Silverware Change Tracking**. Change Tracking Table Setup determines which tables changes' will be tracked and which related tables can view the original changes.

Table No.	Table Name	Active	Related Record Active	Related Record Exist
86	Exch. Rate Adjmt. Reg.	<input type="checkbox"/>	<input type="checkbox"/>	No
87	Date Compr. Register	<input type="checkbox"/>	<input type="checkbox"/>	No
90	BOM Component	<input type="checkbox"/>	<input type="checkbox"/>	No
91	User Setup	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No
92	Customer Posting Group	<input type="checkbox"/>	<input type="checkbox"/>	No
93	Vendor Posting Group	<input type="checkbox"/>	<input type="checkbox"/>	No
94	Inventory Posting Group	<input type="checkbox"/>	<input type="checkbox"/>	No
95	G/L Budget Name	<input type="checkbox"/>	<input type="checkbox"/>	No
96	G/L Budget Entry	<input type="checkbox"/>	<input type="checkbox"/>	No
97	Comment Line	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No
98	General Ledger Setup	<input type="checkbox"/>	<input type="checkbox"/>	No
99	Item Vendor	<input type="checkbox"/>	<input type="checkbox"/>	No
110	Sales Shipment Header	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes
111	Sales Shipment Line	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes
112	Sales Invoice Header	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes
113	Sales Invoice Line	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes
114	Sales Cr.Memo Header	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes
115	Sales Cr.Memo Line	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes

Field Name	Description
Table No.	The field is the Table No. of the record.
Table Name	The field is the Table Name of the record.

Active	The field determines if history is tracked on the record. Pages with a SourceTable that have the Table No. will show the Changes page action to access the changes of the record.
Related Record Active	The field determines if the record can be used to find related records. Pages with a SourceTable that have the Table No. will show the Related Changes page action to access the changes on the record.
Related Record Exist	The field is a Flowfield, which is used to determine if Related Records Exist for the Table Setup.

Page Actions



Action	Description
Related Record Relation	The action opens the Related Record Relation page to setup a history relation to another table.
History Records	The action opens the Change Tracking Record, which displays all instances of a record that has been changed or batched.
Change Button Search	The action opens a report to search for changes in a record in the selected table based on the primary key.
Batch Update Record	The action batches the record update that is selected if it is active. WARNING: This action will lock tables, will take time, and should be run after hours.
Batch Update All Active Records	The action batches updates of all active records on the Change Tracking Table Setup. WARNING: This action will lock tables, will take time, and should be run after hours.
Change Tracking Cleanup	The action will delete data from the Change Tracking Record and the related Change Tracking Fields. This will always leave the last record that was changed for history.

Related Record Relation

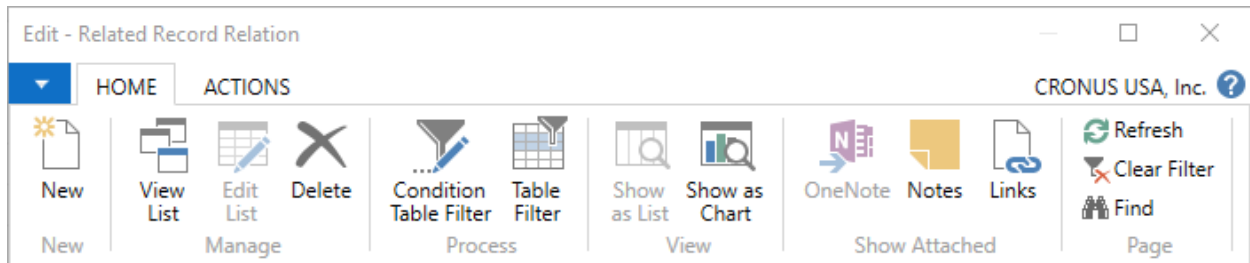
Related Record Relation determines how to bring up Change Tracking from a related record to the source record's Change Tracking. To modify a Related Record Relation, the Related Record Active field on Change Tracking Table Setup must be set to false. When selecting the Related Changes button on a page that is active, it will first start by going through the Related Record Relation based on the Table Relation Order. If all Condition Table Filters match the current record, it will then use the Table Filter to select the source record based on the Table Filter. Otherwise, it will go to next record until the Conditions Table Filters are met. If there are no Condition Table Filters, then that Related Record Relation will be used.

Related Record	Table Relation Order	Table Filter Type	Condition Exist	Table Filter Exist
Sales Line	1	Primary Key Only	Yes	Yes
Sales Line	2	Primary Key Only	Yes	Yes

Field Name	Description
Related Record	The field searches the record to find the related change.
Table Relation Order	The field determines which order the related change is sorted to test the Condition Table Filter.
Table Filter Type	Option <ul style="list-style-type: none"> Primary Key Only (Recommended) – The field will find the Related Record based on the Primary Key of the Related Record. A Table Filter must be applied to every Primary Key. Custom Filter – The field allows for a custom filter to be applied to find the related record. This process can be significantly slower since it must perform a more complex search.
Condition Exist	The field is a Flowfield, which is used to determine if Condition(s) Exist.

Table Filter Exist	The field is a Flowfield, which is used to determine if Table Filter(s) Exist.
--------------------	--

Page Actions



Action	Description
Condition Table Filter	The action opens the page Condition Table Filter to determine if the Condition Filter matches all filters.
Table Filter	The action opens the page Table Filter to link the related table.

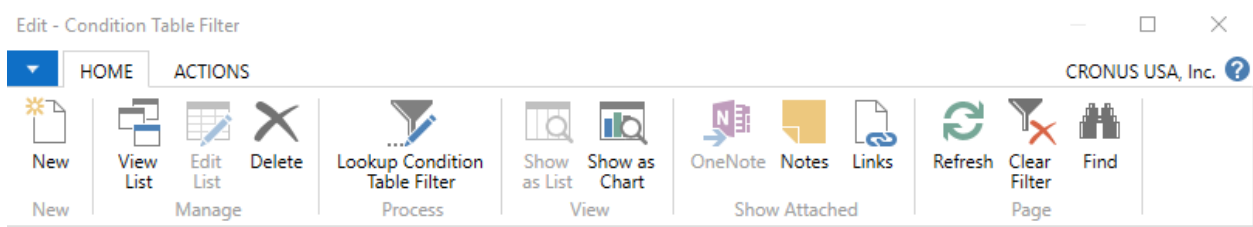
Condition Table Filter

The Condition Table Filter is used to determine if all the filters match the record. Then, the Related Record Relation Table Filter will be used to find the Related Record Change Tracking.

Field Name	Type	Value	Return Lookup Field Name	Lookup Condition Value
Sales Invoice Header	LOOKUP	Order No.	<>	<>

Field Name	Description
Field Name	The field is the name of field that will be checked in the Related Record. The field is only valid with a Type of CONST or FILTER.
Type	The field has the following options: <ul style="list-style-type: none"> • CONST • FILTER • LOOKUP
Value	The field is based on the Type, which determines what value to input. <ul style="list-style-type: none"> • CONST – Exact value to compare to the Field Name. • FILTER – Filtered Value to Compare to the Field Name • LOOKUP – The Table to Lookup to return a Field Value
Return Lookup Field Name	The field return's the Value of the Field from the Lookup Table assigned in the Value. It is only valid with Type Lookup.
Lookup Condition Value	The field will be applied to the value that is returned from the Lookup Field. It is only valid with Type Lookup.

Page Actions



Action	Description
Lookup Condition Table Filter	The action opens the page Condition Table Filter to link the Condition to the Lookup Field.

Lookup Condition Table Filter

The Lookup Condition Table Filter is used to determine the link from the Related Record to the Lookup Table. The link is only determined by the primary key.

Condition Table Filter

Field Name	Type	Value
No.	FIELD	Document No.

Field Name	Description
Field Name	The field to Filter on. It is based on the Table of the Lookup Record.
Type	The field options are: <ul style="list-style-type: none"> • CONST • FILTER • FIELD
Value	The field is the value of the constant or filter expression.

Table Filter

Table Filters are used to find the Related Record.

Table Filter

Type to filter (F3) | Field Name

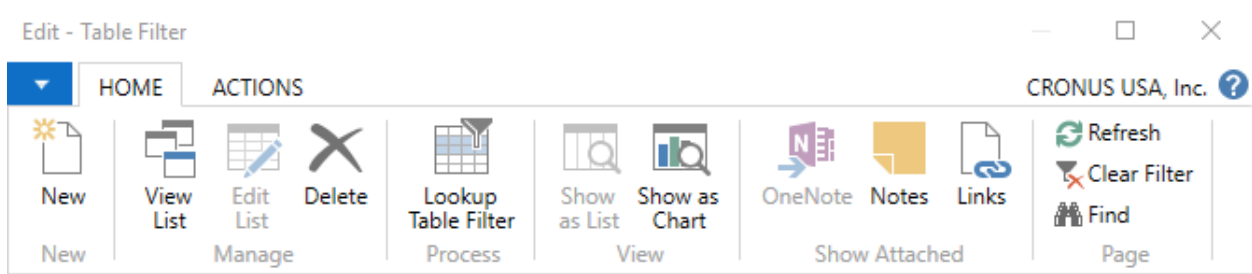
No filters applied

Field Name	Type	Value	Return Lookup Field Name
Document Type	CONST	Order	
Document No.	LOOKUP	Sales Invoice Header	Order No.
Line No.	FIELD	Line No.	

OK

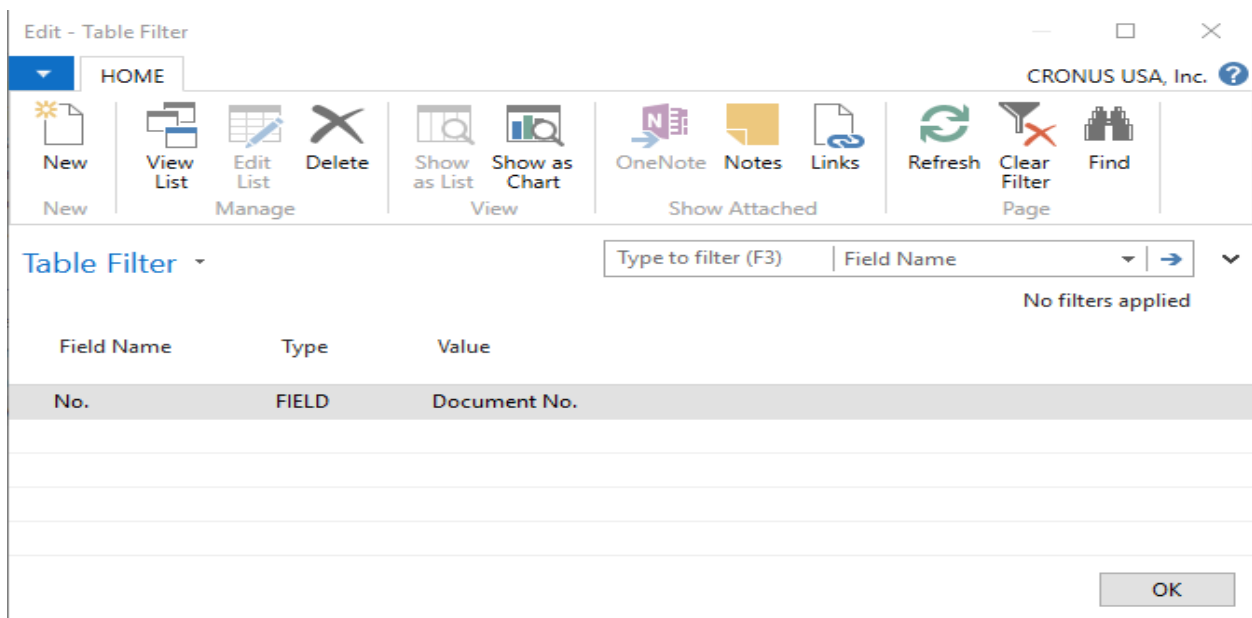
Field Name	Description
Field Name	The field to Filter on. It is based on the Table of the Related Record.
Type	The field options are: <ul style="list-style-type: none"> • CONST • FIELD • LOOKUP
Value	The field is based on the Type, which determines what value to input. <ul style="list-style-type: none"> • CONST– Exact value to compare to the Field Name • FIELD – The value from this field on the related record. • LOOKUP - The Table to Lookup to return a Field Value
Return Lookup Field Name	The field return's the Value of the Field from the Lookup Table assigned in the Value. It is only valid with Type Lookup.

Page Actions



Action	Description
Lookup Table Filter	The action opens the page Table Filter to link the Table Filter to the Lookup Field.

Lookup Table Filter



Field Name	Description
Field Name	The field to Filter on. It is based on the Table of the Lookup Record.
Type	The field options are: <ul style="list-style-type: none"> • CONST • FILTER • FIELD
Value	The field is the value of the constant or filter expression.