



# Orchid Systems View Extender A/P, A/R, and G/L Batch Audit Logging Setup Documentation

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## What's Included

The logging of G/L, A/P, and A/R batches is performed by a single Python3 script executed by Orchid Systems' View Extender module.

The script is triggered by changes performed to the following document batch views in Sage ERP. It will monitor the creation, updating, and posting of these batches.

- GL0008 – G/L Journal Batches
- AP0020 – A/P Invoice Batches
- AP0030 – A/P Payment & Adjustment Batches
- AR0031 – A/R Invoice Batches
- AR0041 – A/R Receipt & Adjustment Batches
- AR0140 – A/R Refund Batches

The following Python3 script is written to monitor the above listed views:

- APARGL\_BatchAuditLogging.py

This scripts need to be setup to trigger upon Sage ERP view events through the View Extender module.

## View Extender Setup

### Setting up the Python3 Scripts to work with View Extender

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The following screenshots illustrate the setup process for adding the custom Python script to View Extender for each of the Sage ERP batch views that require logging.

#### Where not to save the View Extender script

##### Do not save the View Extender Python script into the following locations:

- Do not copy the script into the View Extender program folder. That is, do not copy it into the VI62A program directory.
- Do not copy the script into the COMPANY directory in the shared data directory.

When you save the script away initially, make sure of the above. Save it into a temporary directory, but make sure not to save it in the View Extender program folder, or within the Shared Data COMPANY directory.

#### Navigating to the View Extender Setup

The scripts are added through View Extender's V/E View Events and Scripts UI that is located in the V/E setup menu.

- Create a new record by pressing the green icon with the plus sign.
- Enter the View ID of the view we need to subclass as part of monitoring the view's behavior.
- Create a new line in the entry grid.
- Press Function Key Six (F6). This will call up a Windows Explorer file select dialog window. Go to the location where the custom Python3 scripts are saved.
- Select the Python3 script relevant to the view id entered into the setup screen.
- Save the record by pressing the ADD button on the screen.

The script will now be saved away to be called up when that view is activated and used.

#### Making use of an existing View Extender script

When a V/I script is designed to operate on more than one Sage ERP view, the script does not have to be imported twice.

- First, the script is imported and applied to a view.
- Then, the script is selected from a list of imported scripts and applied to a second view.
- The process is repeated for as many required views as necessary.

The screenshots below demonstrate this process.

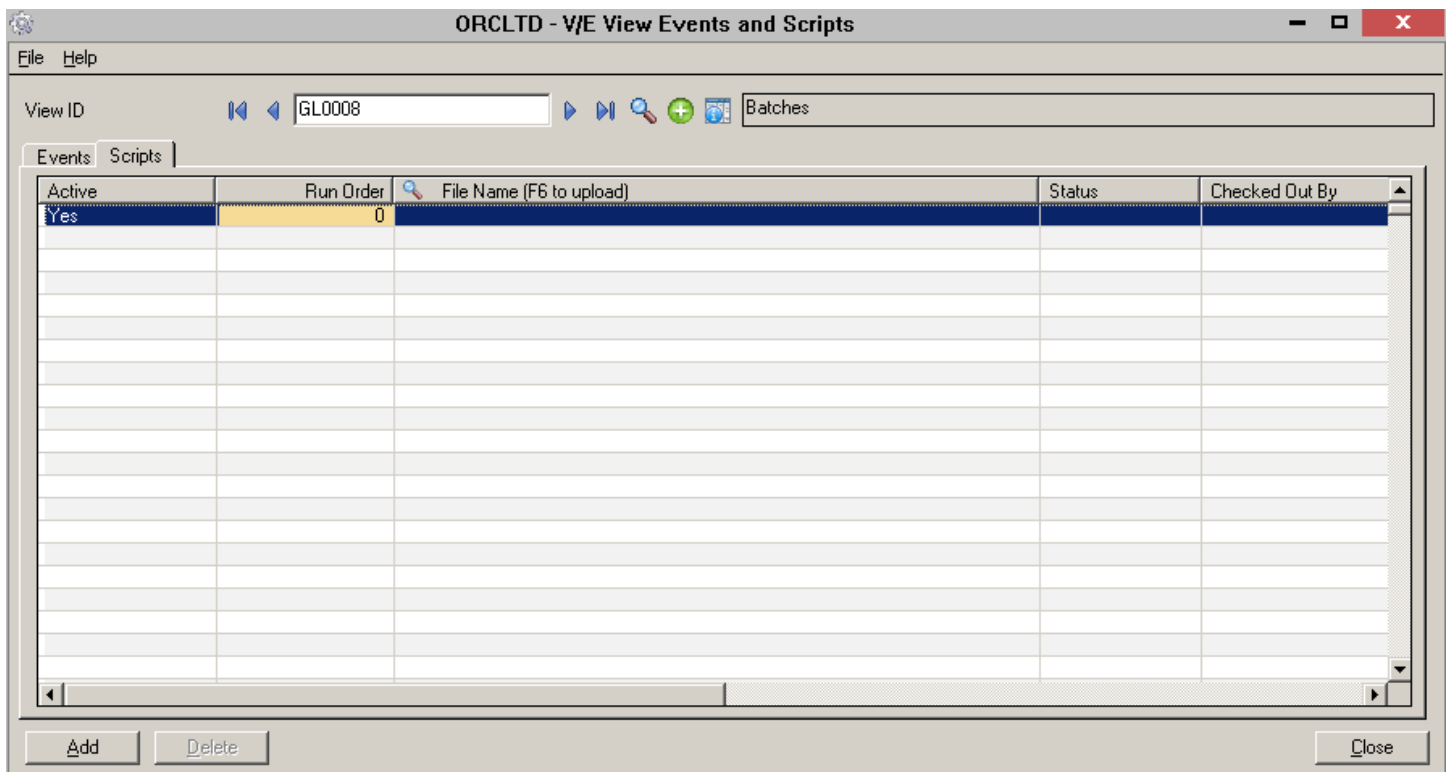
This is important because it is the mechanism by which the APARGL\_BatchAuditLogging script is applied to more than one Sage ERP batch view without the need to import the script more than once into View Extender's setup.

### Importing the View Extender script:

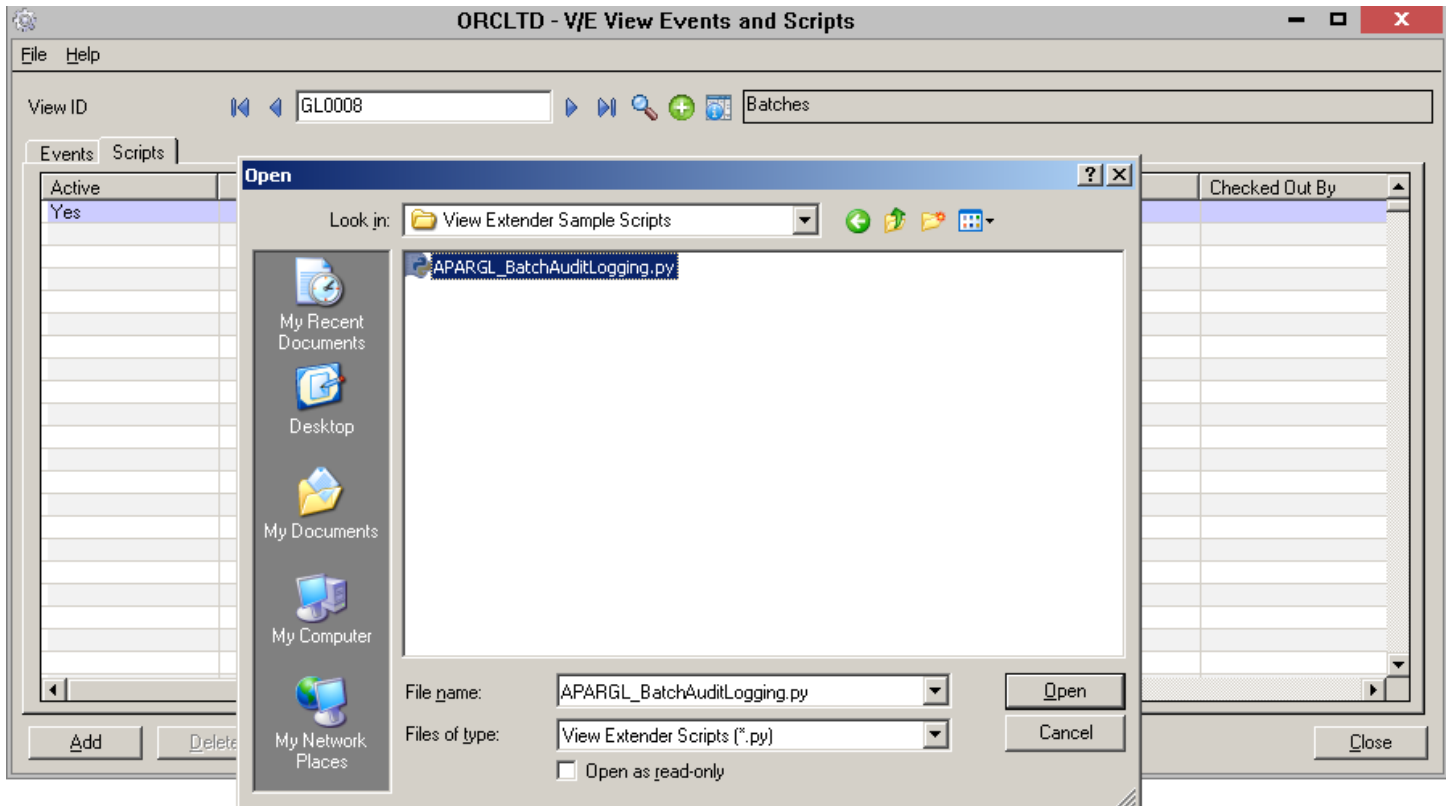
As described above, scripts are added through View Extender's V/E View Events and Scripts UI that is located in the V/E setup menu.

- Create a new record by pressing the green icon with the plus sign.
- Enter the View ID of the view we need to subclass as part of monitoring the view's behavior.
- Go to the SCRIPTS tab.
- Create a new line in the entry grid (may need to press Insert key to get a new line).

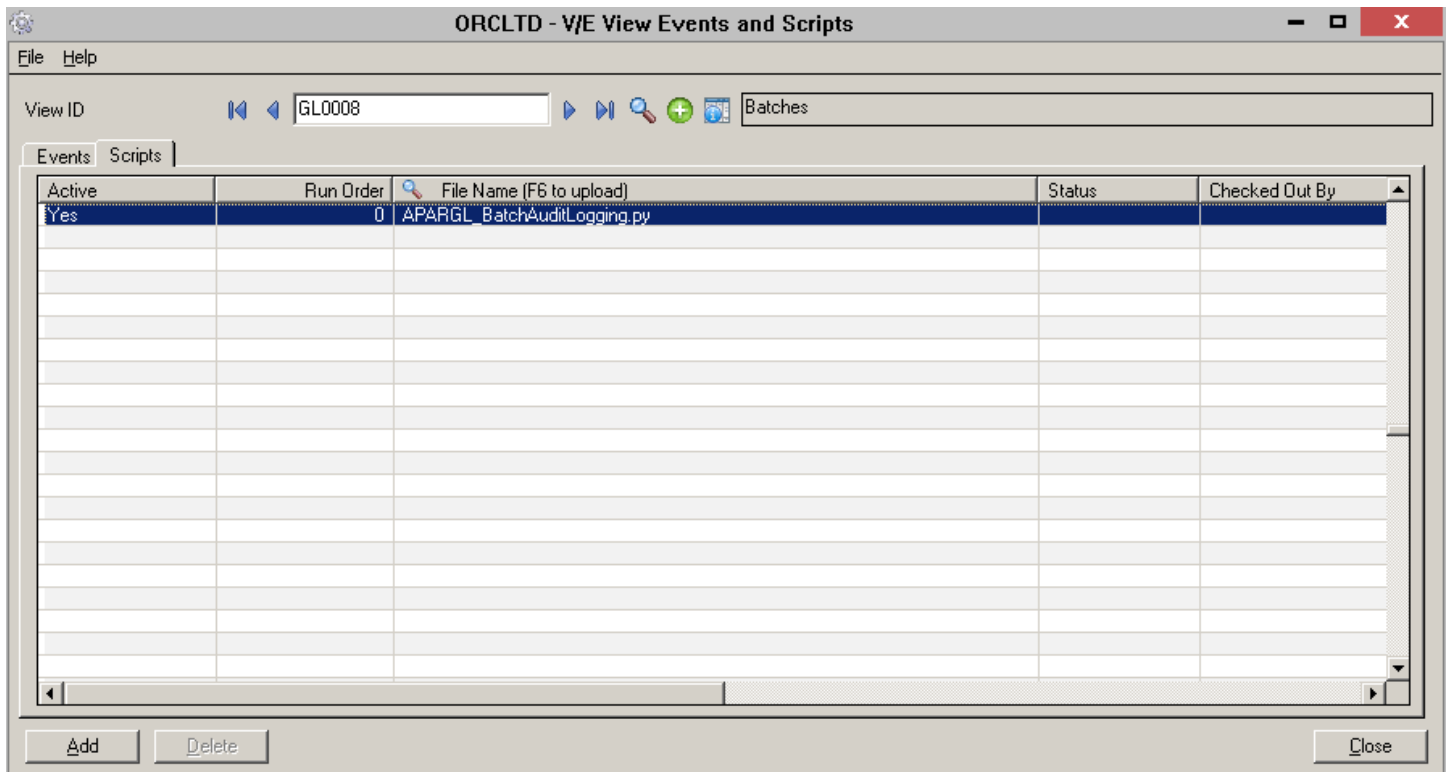
In the example below, we have chosen the GL0008 (G/L Batches) view and will be creating a View Extender record for it.



Press Function Key F6 to call up the “Upload Selection Window”, that is, a windows selection screen where you can choose your custom Python script for *uploading* (i.e. importing) into View Extender.



Press the ADD button to save your name View Extender setup record that will apply to the G/L Batches view.



Upon saving the record, View Extender may prompt you to close and log back into the Sage ERP company in order for changes to be applied.

It is recommended that you do so before proceeding with the next step: applying an “uploaded” script to a new setup record.

Applying an existing View Extender script:

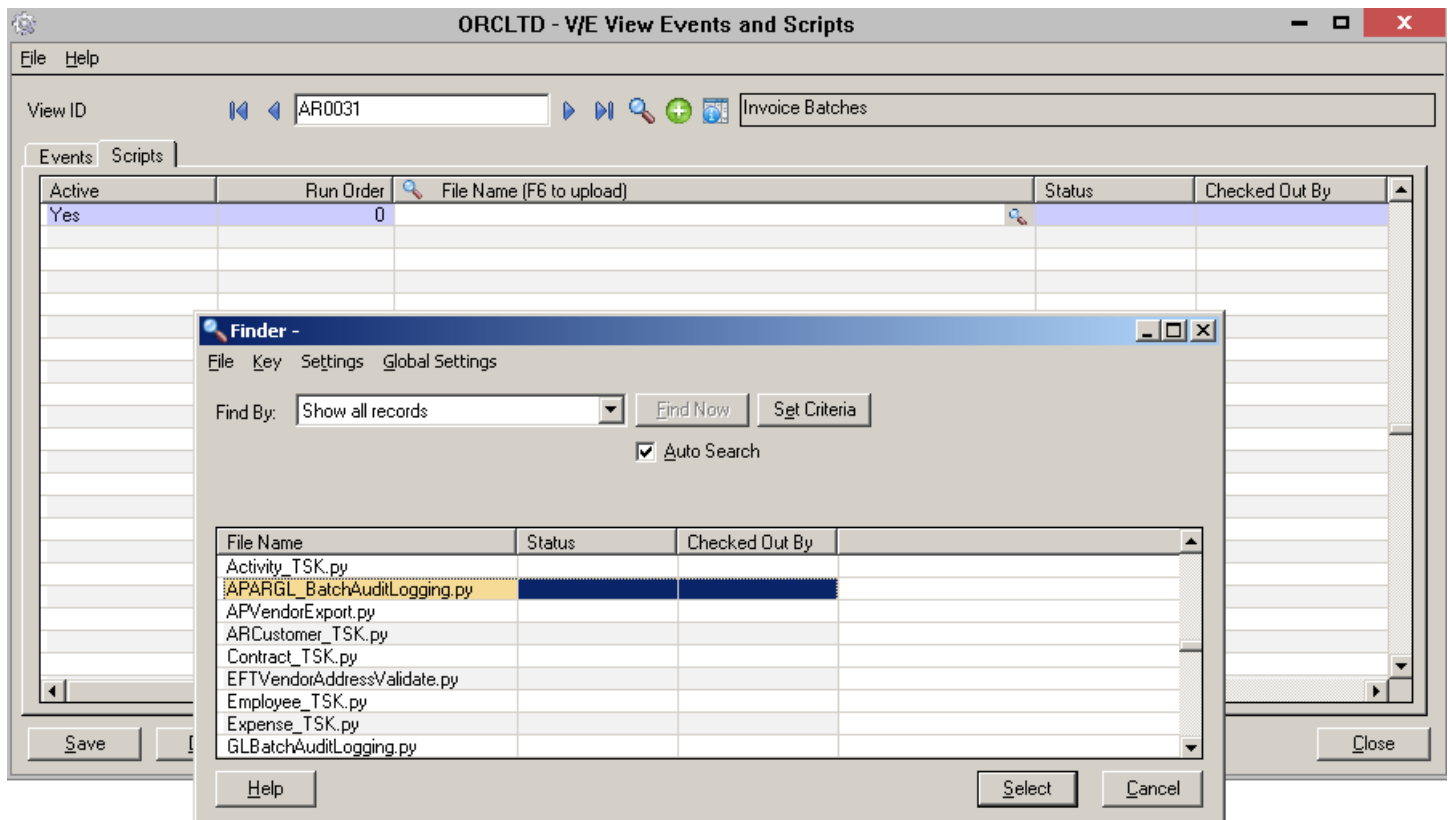
Continuing with the above example, we will now apply the imported APARGL\_BatchAuditLogging.py script to another batch view that we wish to monitor.

We shall now apply this script to the A/R Invoice Batch view (AR0031).

Follow the steps below:

- Go to the View Events and Scripts Setup screen located in the V/I Setup menu.
- Create a new record by pressing the green icon with the plus sign.
- Enter the View ID of the view we need to subclass as part of monitoring the view’s behavior (e.g. AR0031).
- Go to the SCRIPTS tab.
- Create a new line in the entry grid (may need to press Insert key to get a new line).

In the Filename cell of the new entry line, Press Function Key F5 or double click and press the Finder icon. This will call up a Finder window listing all the View Extender Python scripts currently imported/uploaded into View Extender.



Choose the APARGL\_BatchAuditLogging.py script from the list.



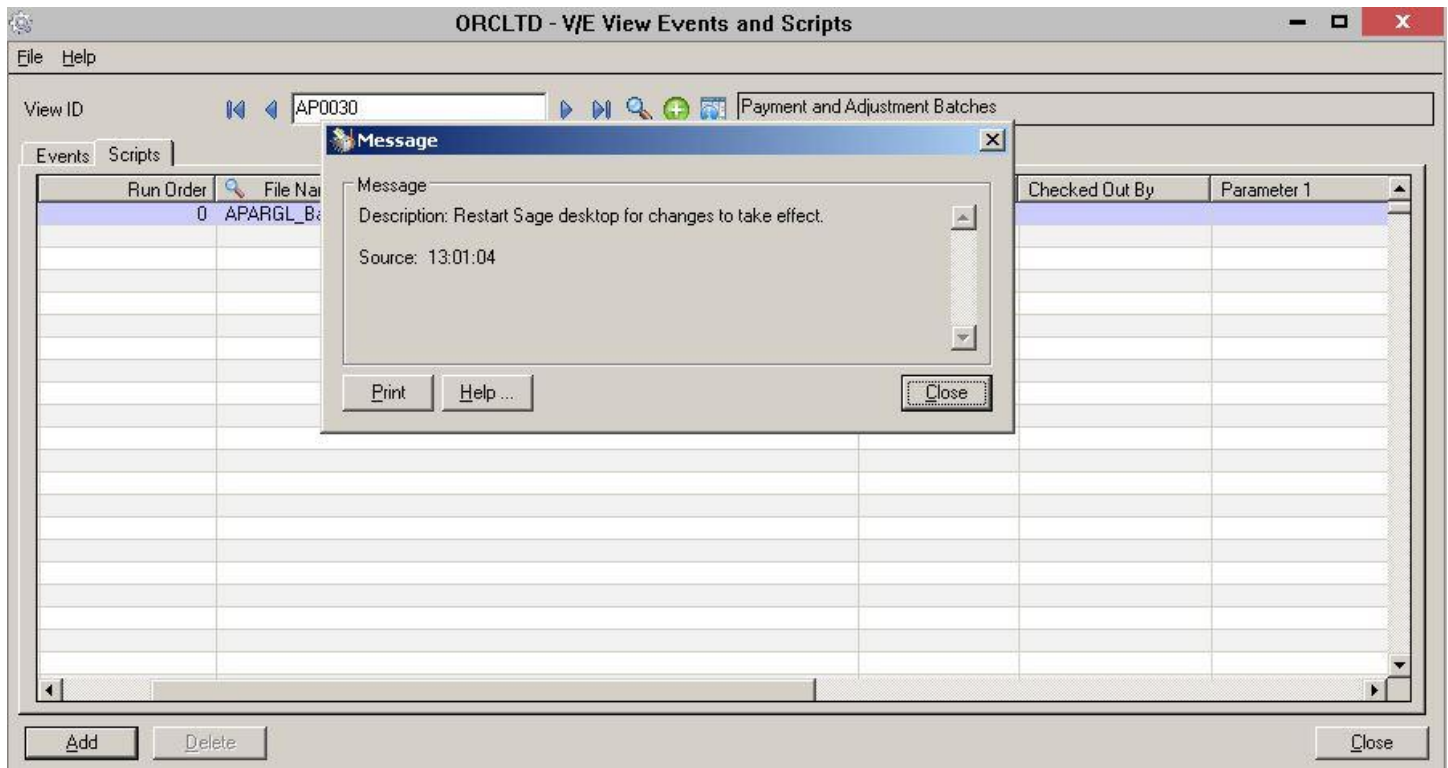
When initially created, script setup records are flagged as ACTIVE = Yes.

To turn a script on or off, change the ACTIVE from Yes to No, or vice versa depending on your requirements at the time.

Creating View Extender setup records for more than one view.

When creating a new setup record, View Extender will notify you that a restart is required.

For example:



If you still have more records to create, you do not need to restart the Sage desktop each and every time.

Create all the required setup records first, then close and restart the Sage ERP desktop once all the records are saved.

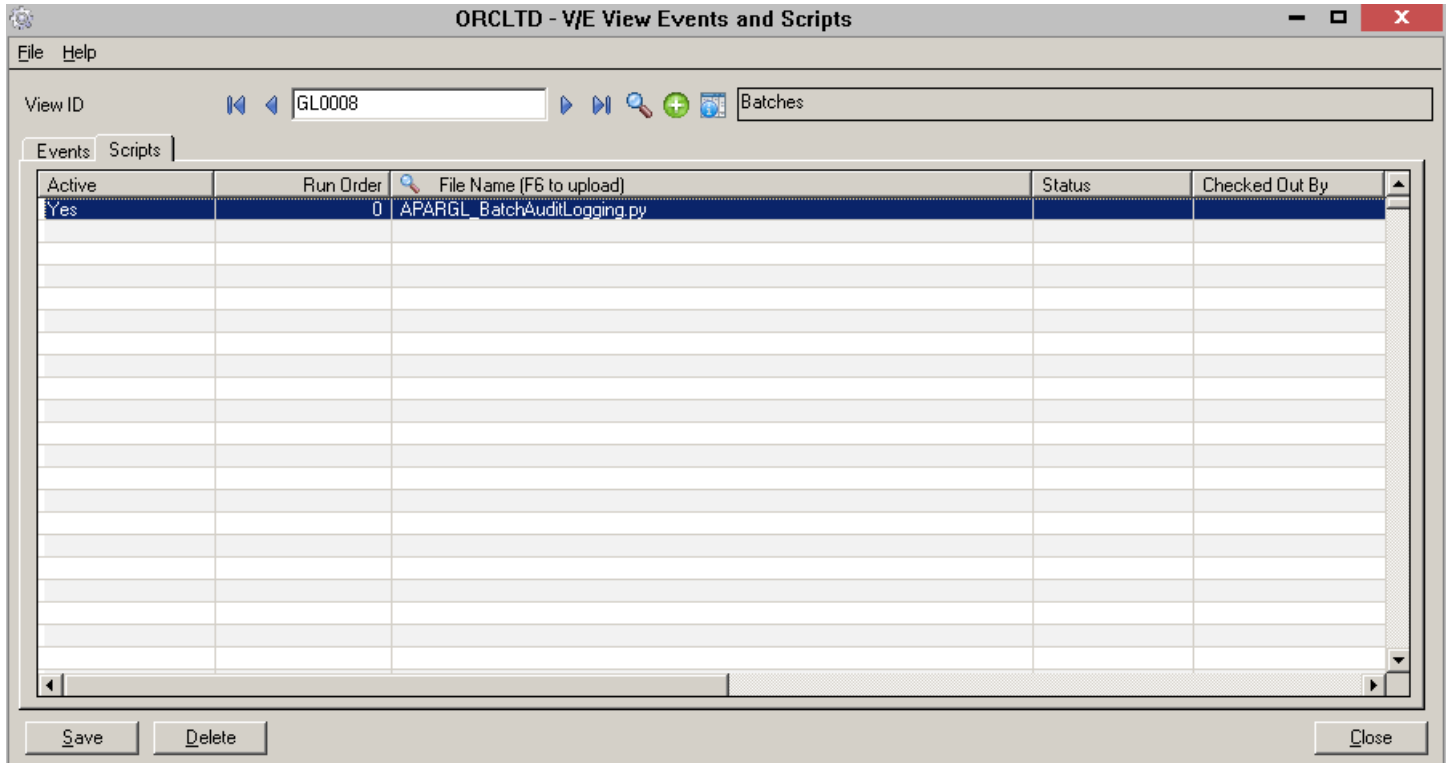
Additionally, logging out of the company database and back in is sufficient for View Extender to load the new setup records.

So even if you do not restart every time you add a record, as a last step to the process (once all your setup records are added) you must execute a log out / log in, or close and restart the Sage ERP desktop.

## Setup for G/L Batches Monitoring

Monitoring the creation, updating, and posting of G/L Batch records requires a V/E record:

- View ID: GL0008 – Batches
- Filename: APARGL\_BatchAuditLogging.py

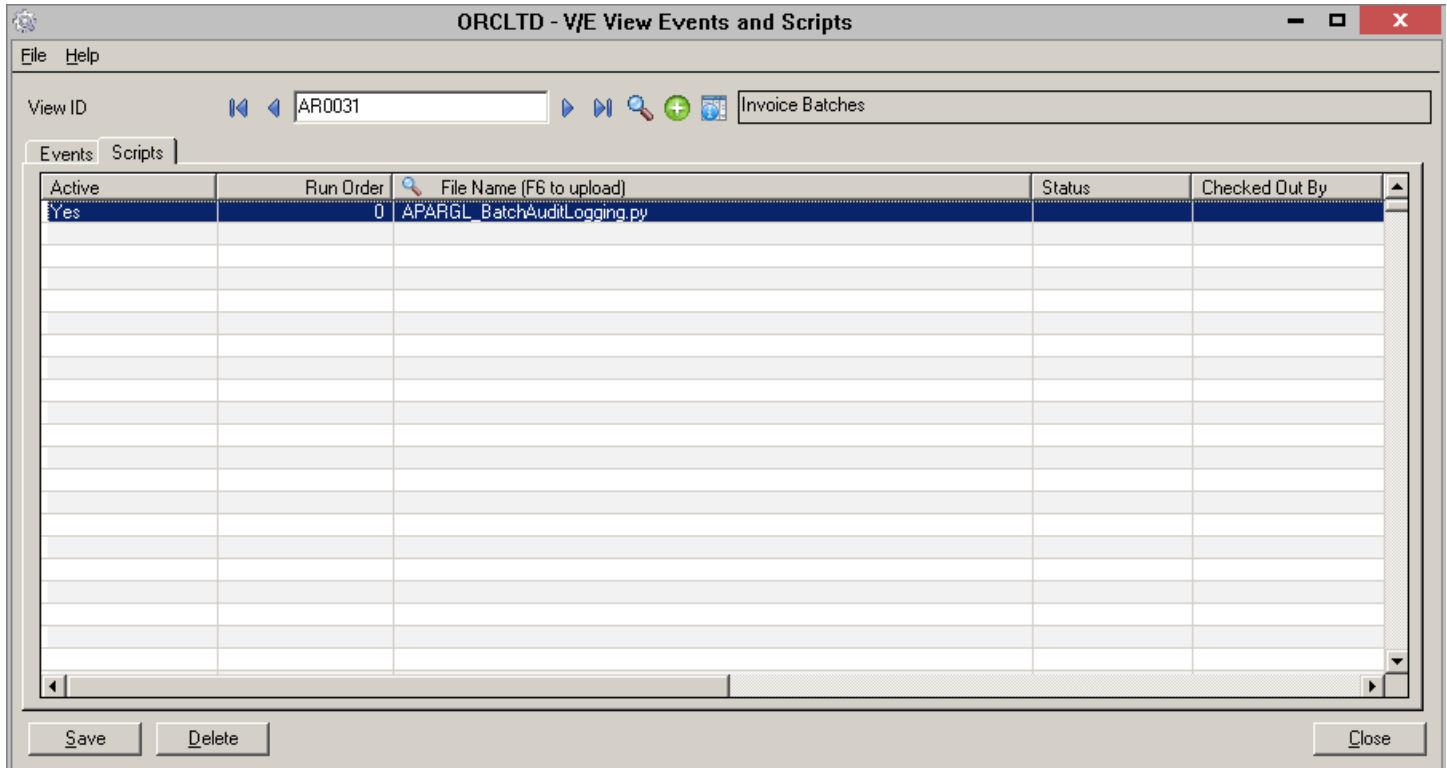




## Setup for A/R Invoice Batches Monitoring

Monitoring the creation, updating, and posting of A/R Invoice batches requires a V/E record:

- View ID: AR0031 – Invoice Batches
- Filename: APARGL\_BatchAuditLogging.py



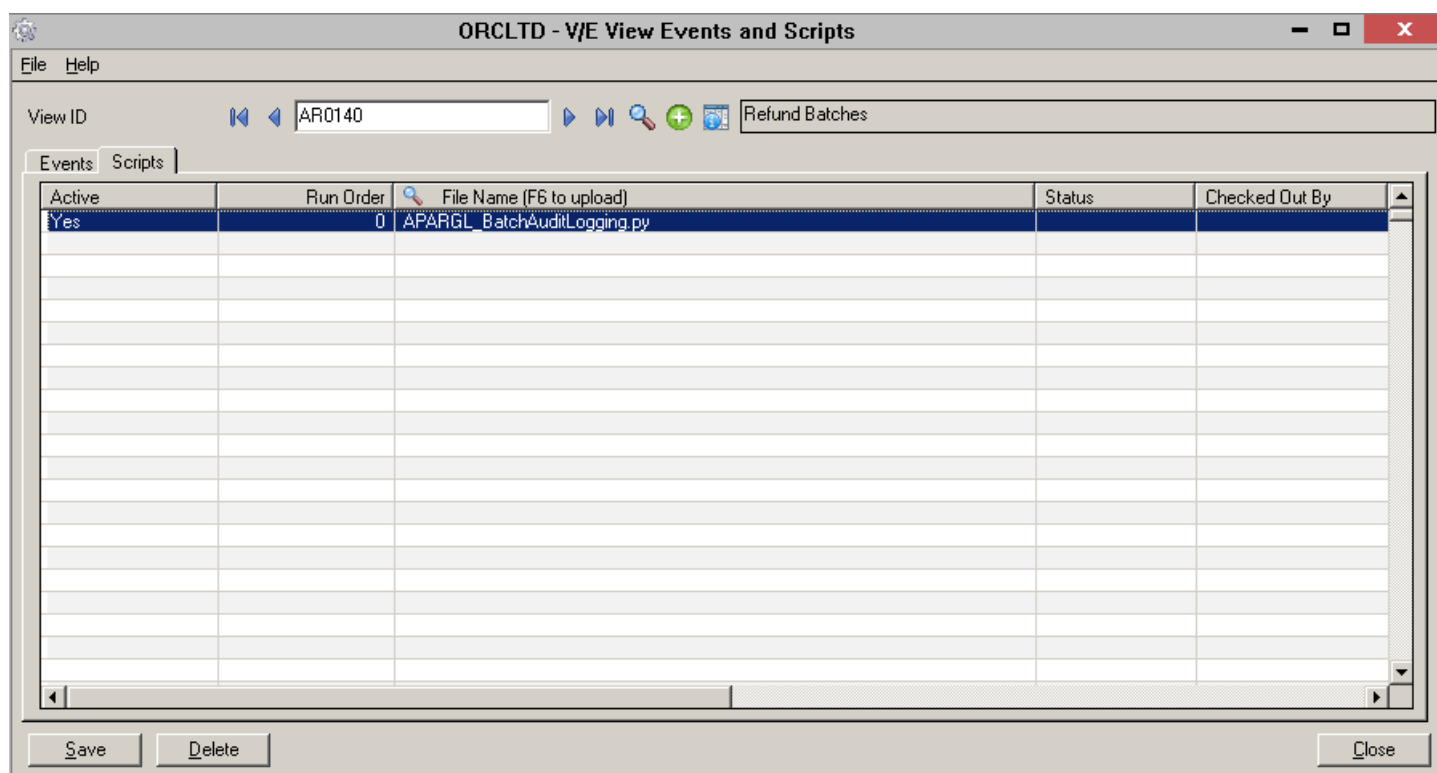
- View ID: AR0041 – Receipt and Adjustment Batches
- Filename: APARGL\_BatchAuditLogging.py



## Setup for A/R Refund Batch Monitoring

Monitoring the creation, updating, and posting of A/R Refund batches requires a V/E record:

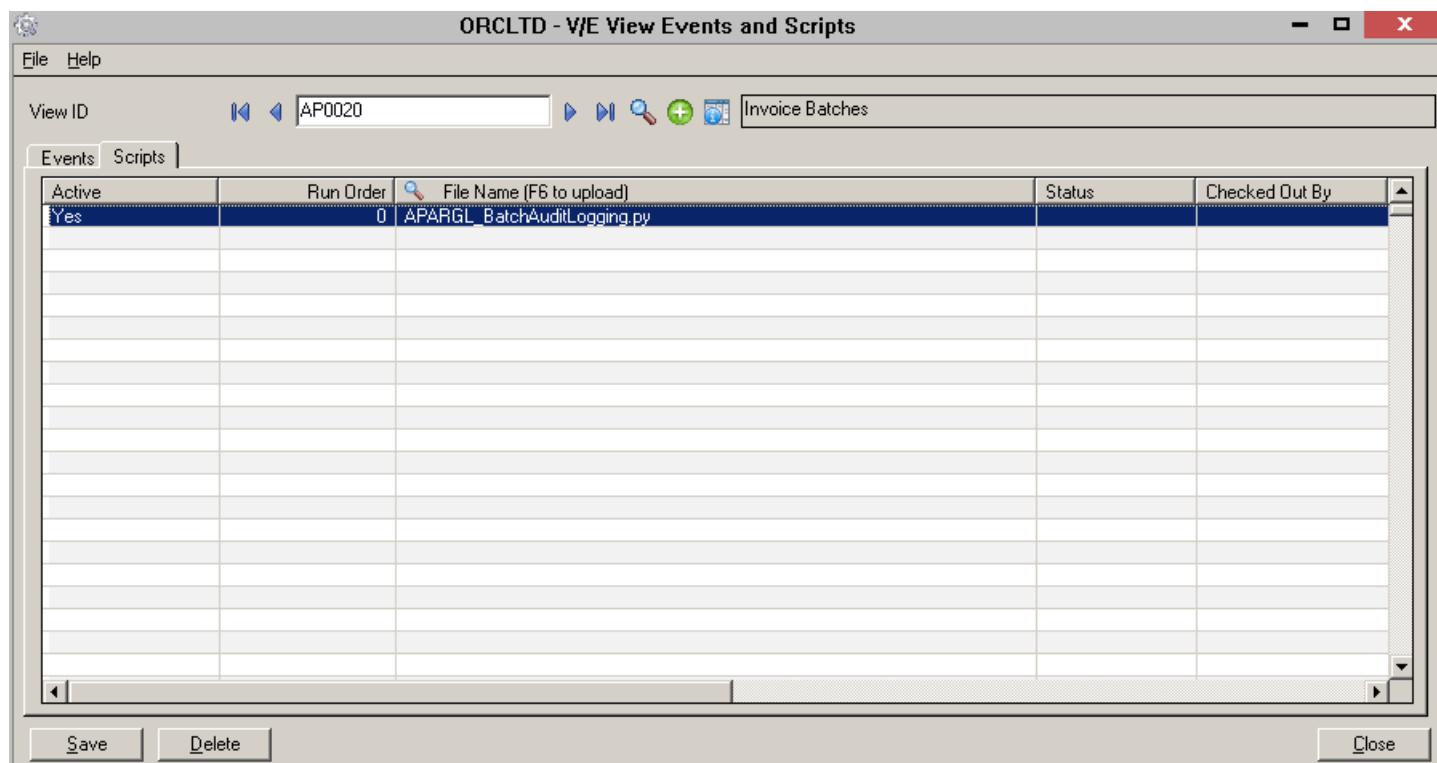
- View ID: AR0140 – Refund Batches
- Filename: APARGL\_BatchAuditLogging.py



## Setup for A/P Invoice Batch Monitoring

Monitoring the creation, updating, and posting of A/P Invoice batches requires a V/E setup record:

- View ID: AP0020 – Invoice Batches
- Filename: APARGL\_BatchAuditLogging.py



- View ID: AP0030 – Payment and Adjustment Batches
- Filename: APARGL\_BatchAuditLogging.py



