**IDX**

INTELLICYBER LTD.

INTELLICYBER CLIENT SERVICES

ICS USER GUIDE

IDX 4 Powered by Intellicyber

## Contents

## Introduction

Introducing the IDX Client Services (ICS) application from Intellicyber. ICS is tool which enhances the experience of the IDX Integration and Alerting toolset, and can be used to leverage visibility, execution and support across the internet.

## Remotely Interact with IDX servers

ICS is a multi-entity application designed to allow different parties access to data via an web client over an internet connection. These users can be vendors, suppliers, consignees, carriers, etc as well as warehouse/logistics personnel and owners of goods in the supply chain. Perfect for solutions such as VMI where multiple parties need visibility of data. A security application gives these entities the permissions and management needed to enable this.

ICS allows administrators and users to interact with IDX servers across multiple networks, all connected through an internet connection. This may be to monitor the status of the integration servers, run an interface on demand, or may be run and view reports created by crystal reports in the IDX4 developer. In fact, Intellicyber can provide customers with Starter Kits of KPI reports and alerts designed around the Infor WM, from operational planning reports through to complex DIFOT calculations. Please contact sales@intellicyber.com for more information.

ICS also enables managers and supervisors to view and interact with IDX4 runtime environment to monitor interface logs, history and errors, as well as access the data files used in the interfaces themselves.

## Key Features

### Reporting Tool

Access any report created through the Crystal Reports designer in the IDX4 Developer. Reports may be run on demand and previewed, or scheduled for a specific time, and may be printed directly, or e-mailed automatically to destination parties. Examples of this would be daily inventory reports to customers, automated invoicing, or daily/weekly type KPI reports.
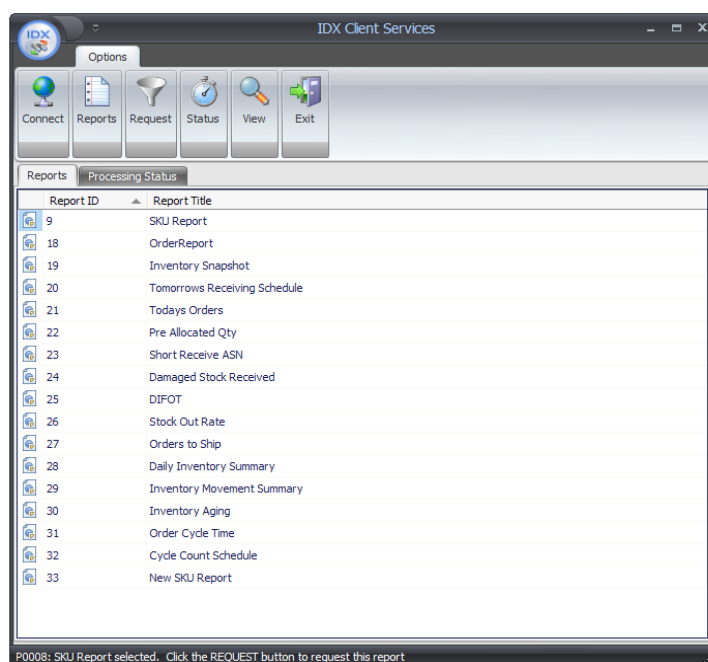
Inherent security can be applied to the reports so that filters and restrictions are applied to users and groups, in that way: owners, vendors and customers through to warehouse staff, can access only the data they *should* see.


## Getting started

To utilize ICS, users only need to install the ICS client to enable access to their reports and information.  This assumes that an administrator has configured and setup the user accounts and permissions.

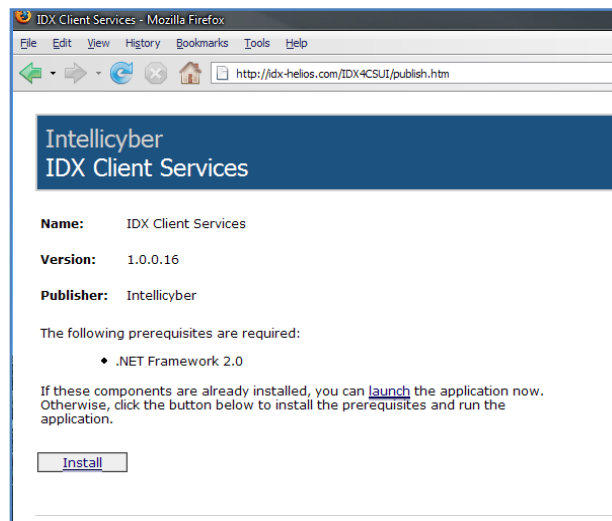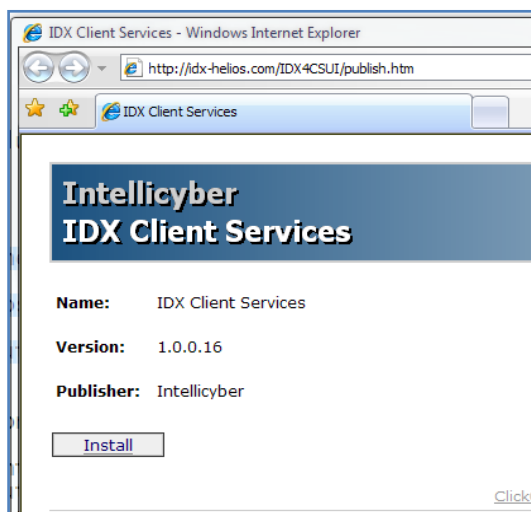### Installing the ICS client

Pre-requisites:

1 - Windows XP, Vista or Windows 7

2 - .Net Framework 2.0 (Included with Vista, available from Windows Updates with XP)

3 - Minimum screen resolution of 1024x768

### Installation Steps:

#### Online Install

1 - On the client machine, via Internet Explorer or Firefox, go to the following URL
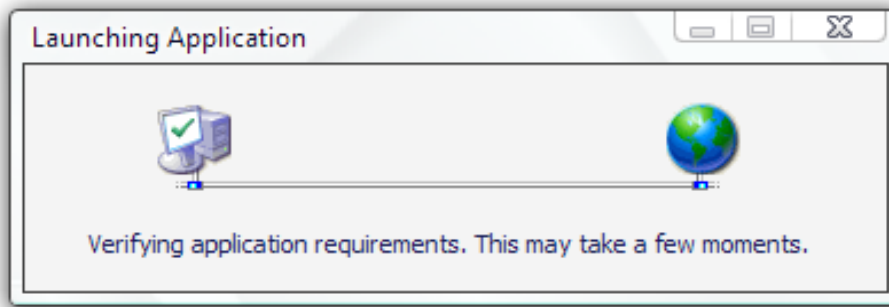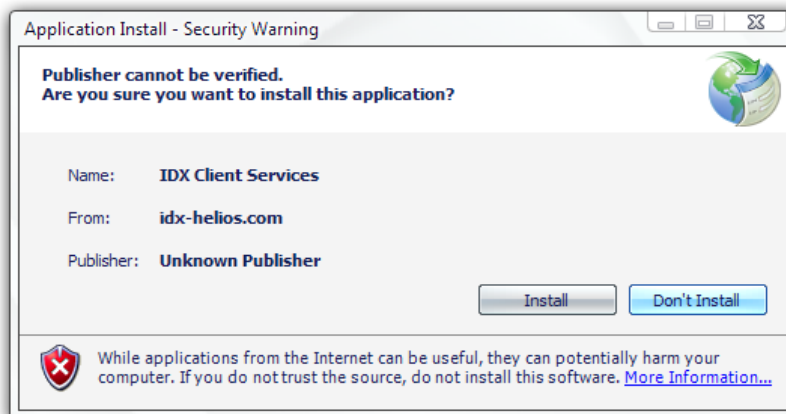
http://idxcentral.idxdev.com/IDX4CSUI/publish.htm



2 - Click the install button.
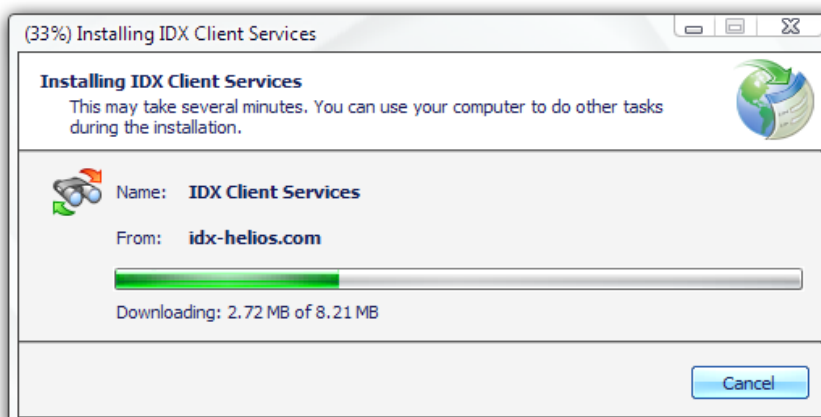
The system will verify the components installed



The Windows installer will then ask you to verify if you wish to install the ICS Client application
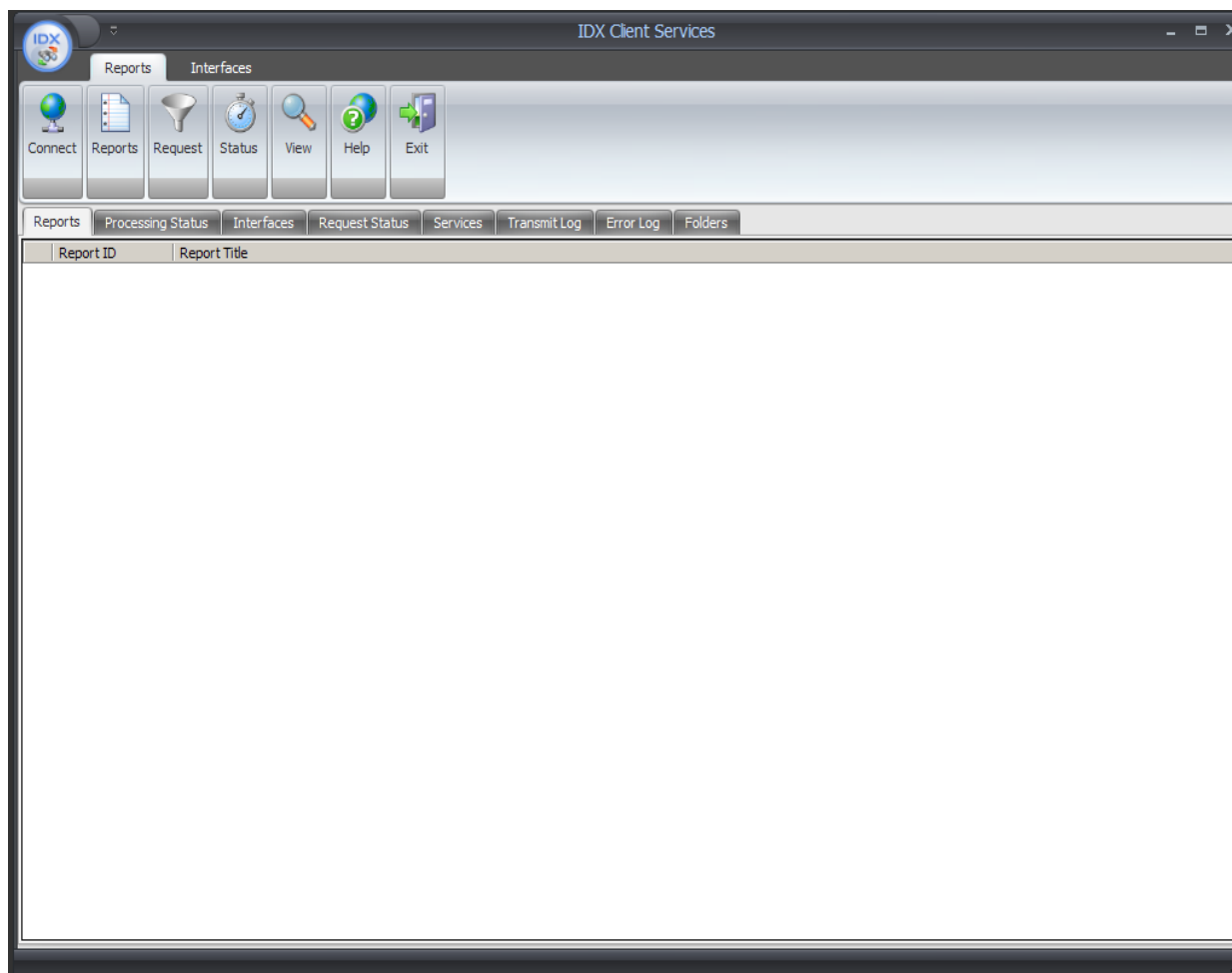


Select INSTALL to continue.

The ICS Installer will now download the application



Once downloading has completed, the ICS application will launch.

Installation has completed.

### *Offline Install*

When a connection to the ICS server is unavailable, or other technical reasons demand, installation of the ICS client can be done offline.

To do this, Intellicyber will provide users a zip file which contains a folder called IDX4CSUI.  Unzip this folder onto a folder on your local machine.

Inside this folder, there will be the following files:
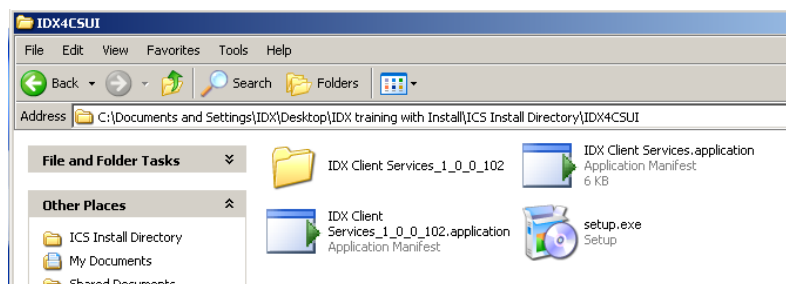


Double click setup.exe to proceed, and setup will follow the above steps as normal.

(Note:  Occasionally company's firewalls / virus programs will remove the setup.exe)
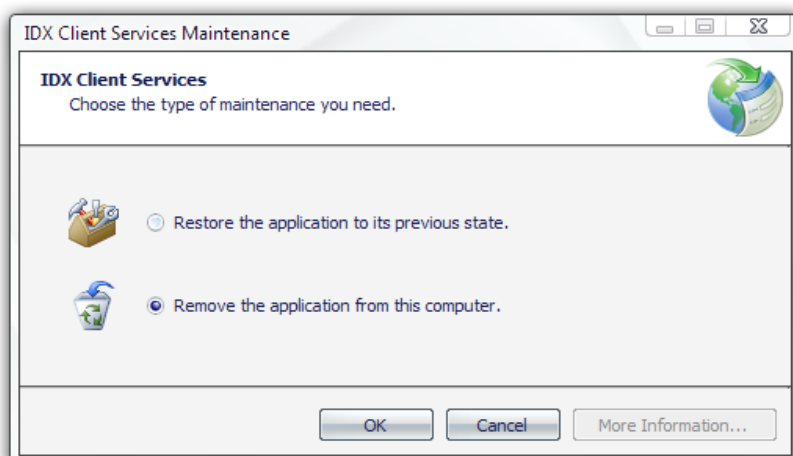
### Removing the Client installation.

To remove the client installation, go
to the Control Panel in Windows.

Select add remove programs.

Find the IDX Client Services
application, and select
Change/Remove.

From the Dialog box that appears,
select the Remove application option
and click OK.



### Updating the ICS Client

*Offline Updates*

When the ICS client is offline, and updates need to be applied to the client, there is no facility to
update the existing installation.  Users must remove the existing ICS client, and then reinstall the
version as new.  Follow the steps for Removing the Client, and then the installation steps again.

## Using the IDX Client Services

To start the application select the IDX Client services shortcut from the start menu, it will be located
in the Intellicyber program group.

It will open with a blank screen.

### Connecting to an ICS Server

First step is to Connect to the appropriate ICS Server.

Click the 'Connect' menu button to bring up the login dialog.

The login dialog box will appear asking for user name, password and the ICS server to connect to.



By default, initially the login screen will be restricted to login to the idxdev server.  In this way users can connect to the Intellicyber server and test some of the sample Start Kit reports available.

To unlock your ICS client application, click the register button on this screen, which will open the serial number generation screen.

On this screen should appear a Serial Number, along with an e-mail address.  Please copy the serial number into an e-mail and send it to the Intellicyber address.

A prompt response will be sent notifying you that your client is registered.

Once you have a confirmed registration, when you start the ICS client, you will see the Server URL and other fields are not editable, and the Logo should be changed to match your corporate logo (as required).
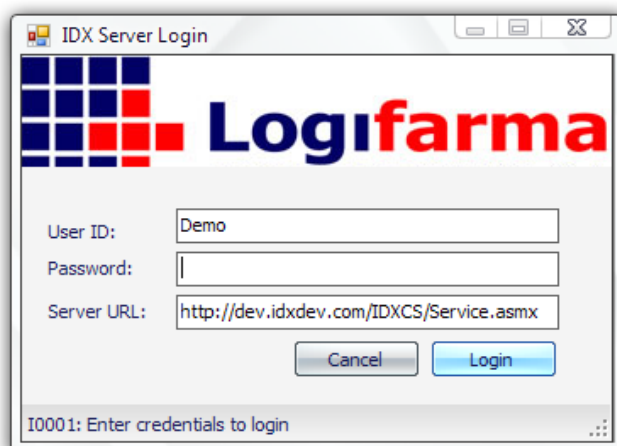
*Your own details will be provided by the system administrator within your own network.*

The ICS client will remember your last Server URL and User ID details, so you don't need to keep entering these each time you start the program.

If you are successfully, you will see the status bar in the bottom right corner of the screen inform you, that you are connected correctly, and to which server you have connected.



P0002: Successfully connected to IDX Server at http://127.0.0.1/IDXCS/Service.asmx

If you do not Connect and login, no reports or details will be available to you.

## Main ICS Navigation

Within ICS are three levels of 'icons' or tabs.  At the upper level, switches between "Reports" and "Interfaces".  The Interface section is discussed in the Administrators guide section.



The Next layer down contains the main **REFRESH ICONS.**  These icons will cause the ICS Client to download information again from the ICS Server.  By Selecting the Reports icon, will download the list of appropriate reports from the server.



Underneath the 'refresh icons' are the NAVIGATE ICONS.  These move the user between data that is already in the ICS application memory, and will NOT refresh or download the data again.
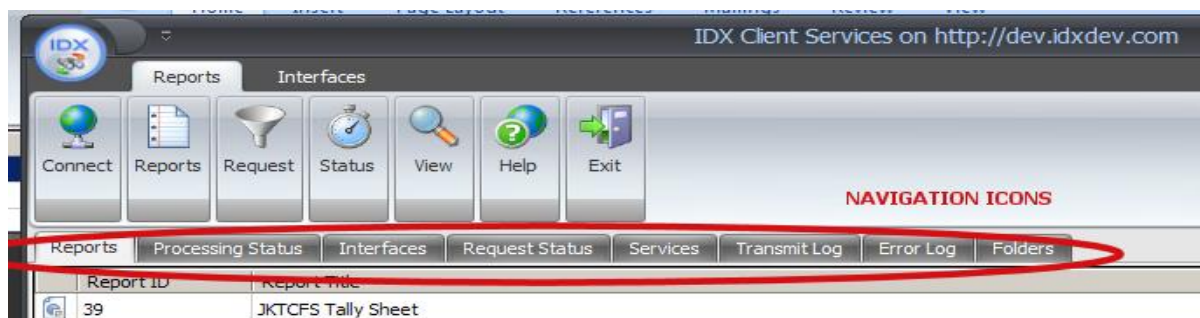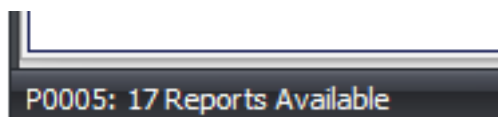
## Reports

After connecting successfully, you can retrieve the list of reports available to use.  These are restricted by security settings, so you can only see what you are given permission to see.

Click the Reports button in the menu ribbon bar.
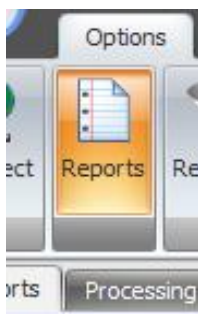


*Setting up of this security is described in the Administration section.*

The status bar at the bottom of the screen will summarize the number of reports available, and the report names themselves will appear in the Reports Tab.



The Report ID represents the unique report number configured by the IDX manager and is used to relate back to the setup for administrators.
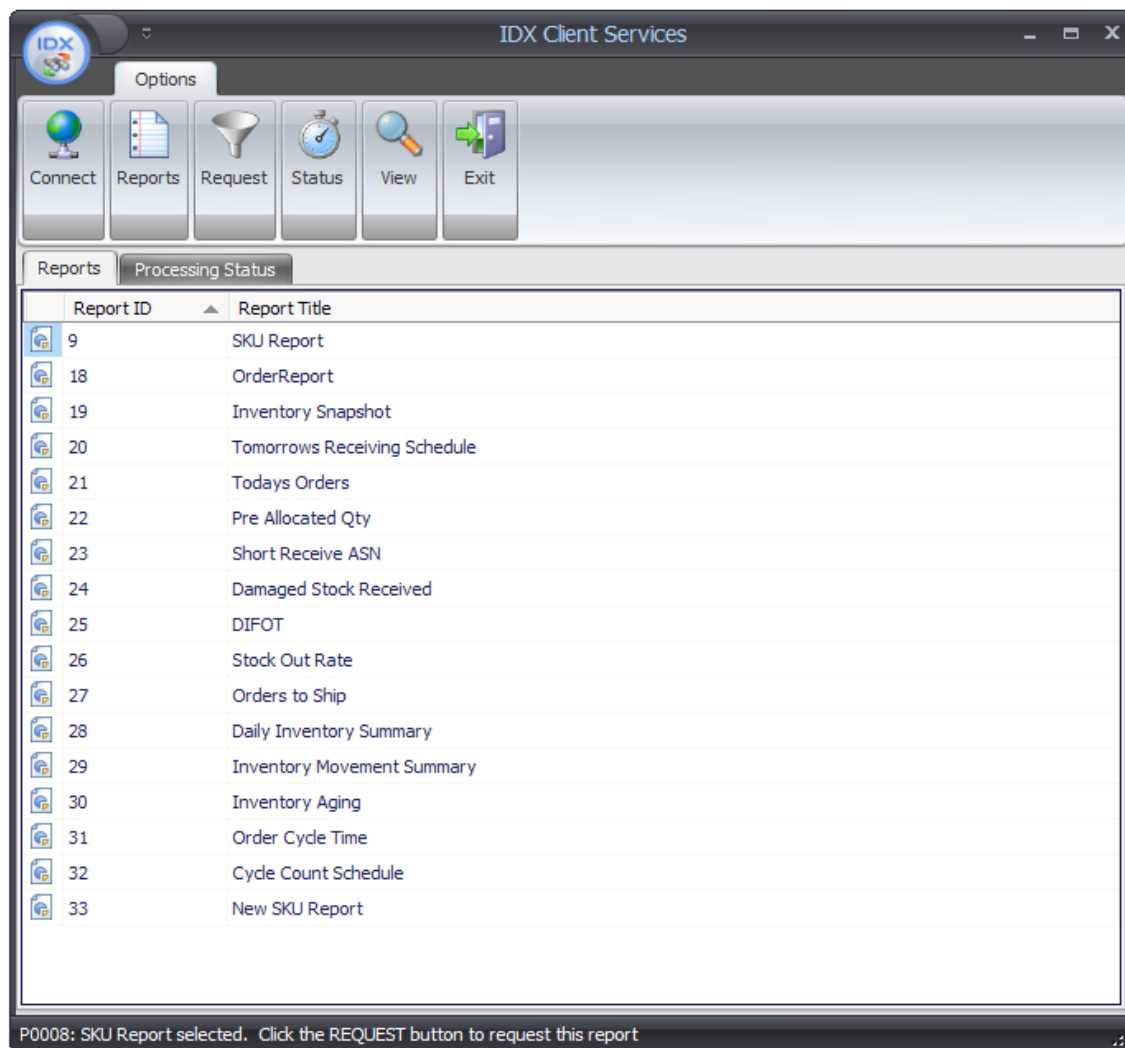
## Requesting a Report

To run a report, simply select the desired report from the list by clicking the Report Title or Report ID.   The status bar will update with the selected report.



P0008: Inventory Snapshot selected.  Click the REQUEST button to request this report

Select the Request button from the menu ribbon to begin the process.



The Report Filters menu will appear.

## Report Filters

If the report has any values that must be passed in the report, these will appear as filter items in a list. If the report does not require any filter values the list will be empty.

Report filters are used to add parameters to a report, and are created when the report itself is designed. Examples of filters may be dates, document numbers, customer details, etc.

The filter needed will be displayed in the filter column, and the value will contain the user inputted data needed to run the report.
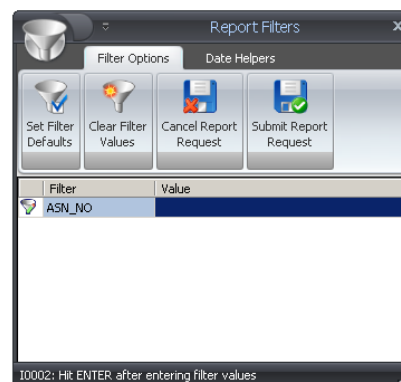


In the example below, a SKU is needed to retrieve all product information for that commodity. To enter this value, select the value and type in the required information.
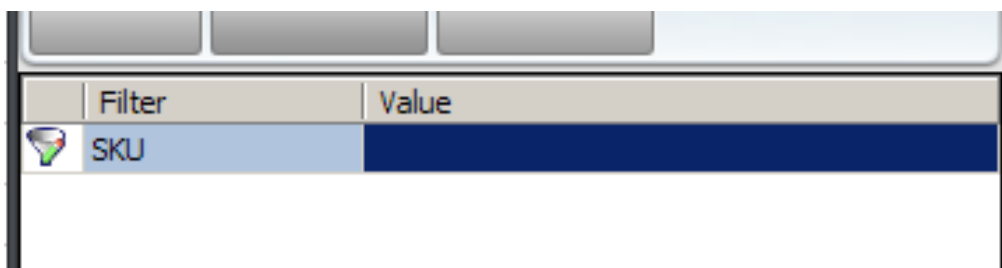


It is important that you press ENTER after each value to 'lock it in'. You will see this by the value parameter being highlighted.
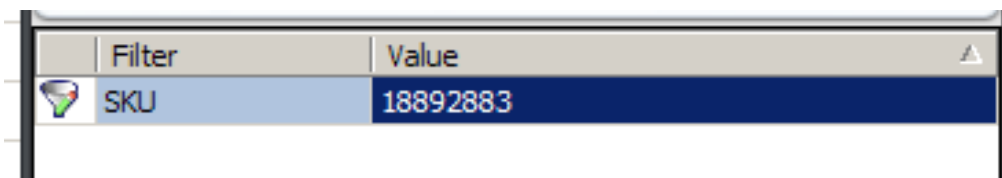


## Set Filter Values

The Save Filter values button is used to remember the currently entered value in the Value boxes. To use, enter the values you wish to be default, and then the Set Filter Values button. If all goes well, the status bar will display 'Filter Values Saved', and these values will be displayed when the report is requested next.

## Date Helper

If the filter values require a date value, then the date helpers will assist in entering this information. Date Helpers will ensure that dates are always entered in the correct format for users to avoid conflicts with different countries formats.
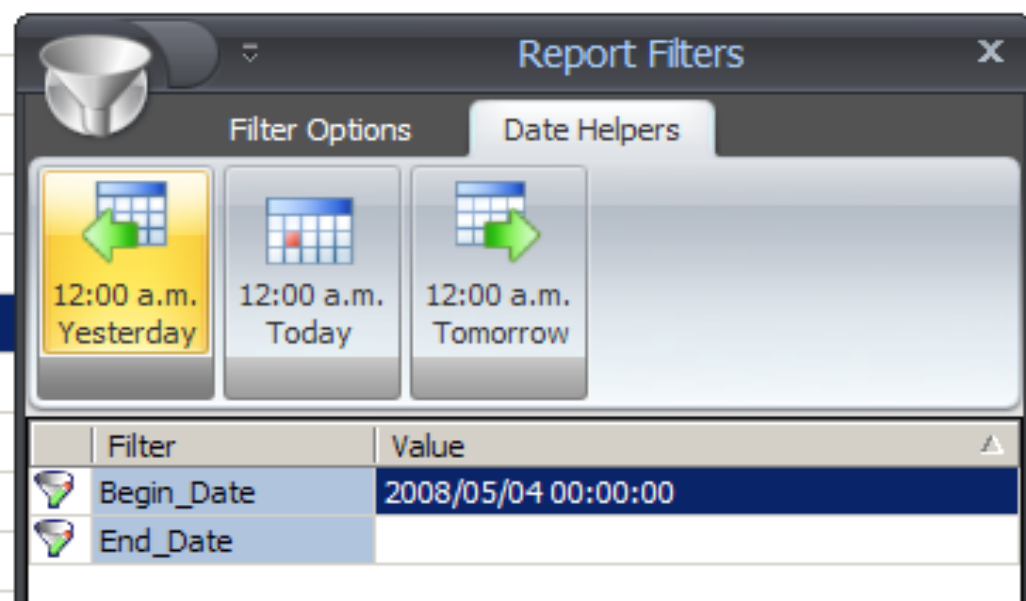
In the above example, a Begin Date and an End date are needed.  By clicking in the date helper tab, users can select Yesterday, Today or Tomorrow.  This will then put that date in the correct format in the filter space.  You can manually change this value now if you need (i.e. to change to 18:00:00).

Notice that the format of the date is YYYY/MM/DD HH:MM:SS.  This is a standard default date in ICS.

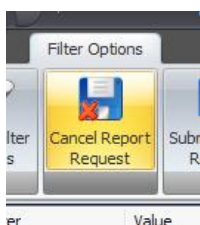Click back on the Filter options tab to continue the "Submit Report Request"

## Clear Filter Values
If you wish to delete all values in the filters, select the Clear Filters button from the menu ribbon. This will remove all values.



## Cancel Report Request
If you do not wish to run this report, select the cancel Report Request, or the 'X' in the top right hand corner.



This will return you to the Reports Tab.

## Submit Report Request

Once all necessary filter values have been added, select the Submit Report Request button from the menu ribbon.  This will schedule the report job on the IDX server, which will then run.
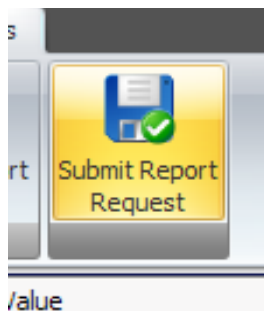


The filter menu will close, and the status bar will update with the details of the job just created.
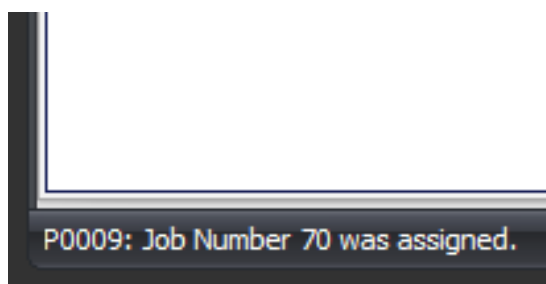


This job number can be used to monitor the job status as it runs.
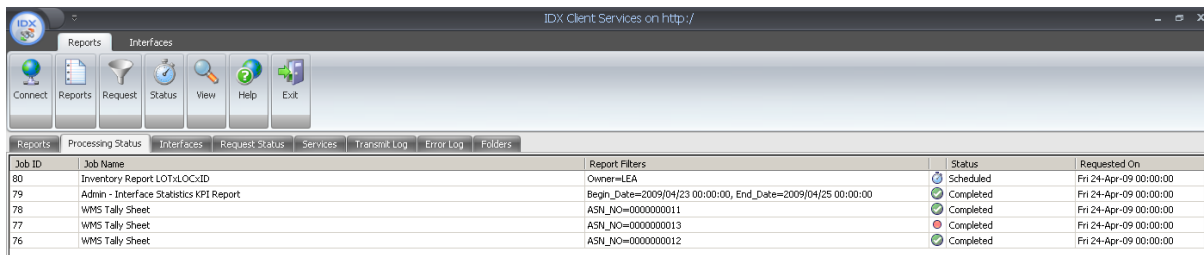
### The nature of IDX Reports

IDX reports will be available to view from the ICS client (as discussed below), but are part of a process that may include many functions, such as Skype alerting, and e-mailing.  In this way the Submitting of a Report Request may actually do multiple steps, such as creating a report dataset in the data warehouse, creating a pdf report based on that data, and then emailing this report to a specified party.

## Status

Once a report has been requested, it will appear in the status tab.  To go here, simply select the Refresh icon 'Status' button in the menu ribbon.  This screen is restricted to only display jobs that have been requested over the past 48 hours.



This will then 'Refresh' and then display the recent report jobs that have been run, as well as the filter values used, and the status of the report.

In the status bar, the job just requested will still display, so it is easy to see current status of the report job.

Initially the job will be of a status 'Scheduled', which means it is queued to run on the appropriate IDX server.   Scheduled

Once it has started on that machine, the status will show:   Running

And once the report has been generated, the status will be:   Completed

If the report running has an error or some other problem (usually filter values do not match data in the source database [in the example above ASN_NO = '0000000013' does not exist in the WMS]), the Status icon will display a red dot.   Completed

As displayed the Report Filters column shows the data entered in the filter popup when requesting the report.

To refresh the Status list, just click the Status button again.

## Viewing a Report

Once a report job has been completed, the report will be available for viewing.

To view the report, select the appropriate Job number from the status list, and then click the view button on the 'Refresh' menu bar.
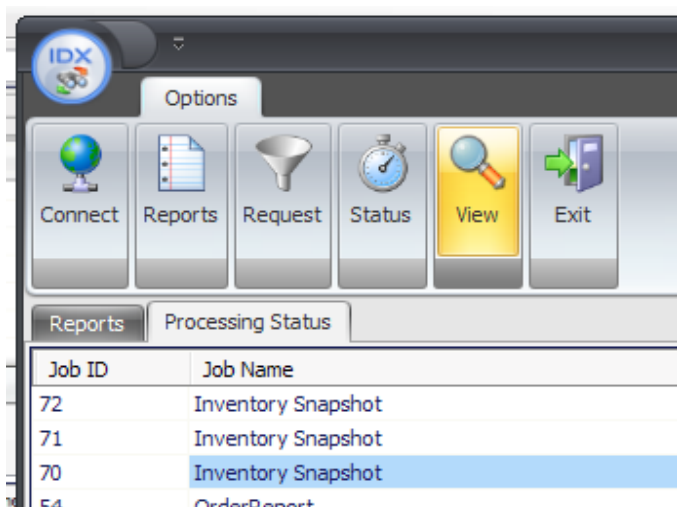


If the report is available, it will display in the status bar of ICS




P0010: Launching browser to view URL http://localhost/Reports/OrderReport{389ACDC7-F86F-49A9-B51C-90C037900AA8}.PDF

Where the Report name is appended a globally unique identifier for this particular job.

It will open the pdf report in a browser window (your default browser).  If the report is an Excel or word file, it will ask you to confirm opening in Excel or word.



The report can be then saved to your local machine, or printed out, as required.

If the report has been removed from the server, the status bar will show that the Report is not available.  You must re-run the report.  If the report will not generate, and you are entering the correct parameters, please contact your administrator.
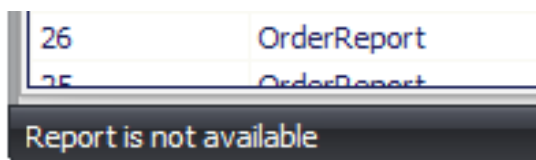


## On line Documentation

This guide can be downloaded from the ICS client as required.  This is usefull where remote installation is required and does not need the user to have a setup package, etc.

To do this simply click the 'HELP' icon in the Refresh bar.
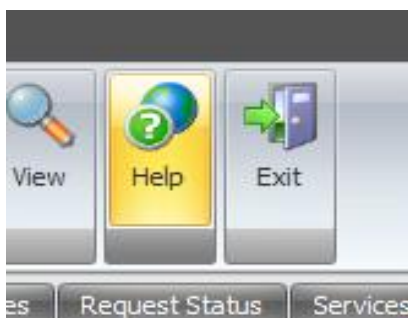
## Exit

The application can be ended by selecting the Exit button from the menu bar, or by clicking the 'X' in the top right hand corner of the application.
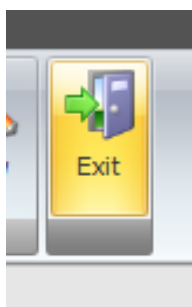
# ICS Client Services Application for Administrators

The ICS application "Interface" tab holds information of the status, history and other information pertaining to the running of the IDX Schedulers.  This information is able to be accessed via the client over the internet or intranet.

It is assumed setup and configuration have been completed as specified elsewhere in this guide.

Once the user has logged into the ICS application, selecting the "Internet" tab in the top will open the IDX Server Management functions.

## Services
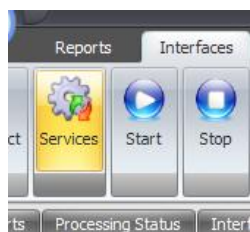


Selecting the refresh icon for services will pull down a list of all interface and report jobs from the Computer / scheduler combinations created in the setup step (NB: this is where you added the computer ID and scheduler ID into the DB manually)



This data will refresh every time you select the Services refresh icon.

- Computer Name  - Displays the Computer name configured in the DB above
- Scheduler – Shows the Scheduler number running on the Computer
- Interface – This displays the Interface Name that is setup in the Interface section of the IDX manager.
- Status – Will display the Status as at the last 'refresh' of the list of services. (this can be modified through the use of the Start Stop functions described below.
- Next Run – displays the date /time that the specified interface/report is next due to run.
- Last Run - displays the date/time that the specified interface/report last completed its run.
- Schedule - shows the schedule configured through the IDX manager.

Any of the interfaces can be stopped by the Administrator at any time.  Simply select the interface desired to be stopped and click the 'Stop interface' Icon.

The client will ask you to confirm this function.
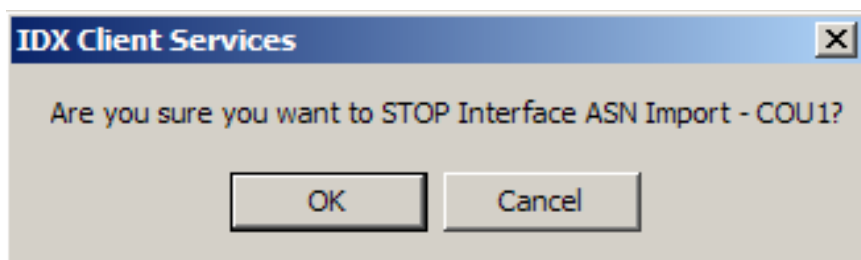


The interface or report will then be marked as "stopped" and will also remove itself from the IDXShedulerApp it was assigned to.  In this way the interface or report will not run again until the administrator starts the jobs.

Any manual jobs requested while it is stopped will be buffered until the service is started again. (i.e. if users requests reports, they will show as Scheduled for the users, and will run in requested sequence once the service is running.)

To Start any of the stopped interfaces, simply select the desired stopped interface and click the Start button in the refresh menu.  After confirmed the start, the service will begin running again.
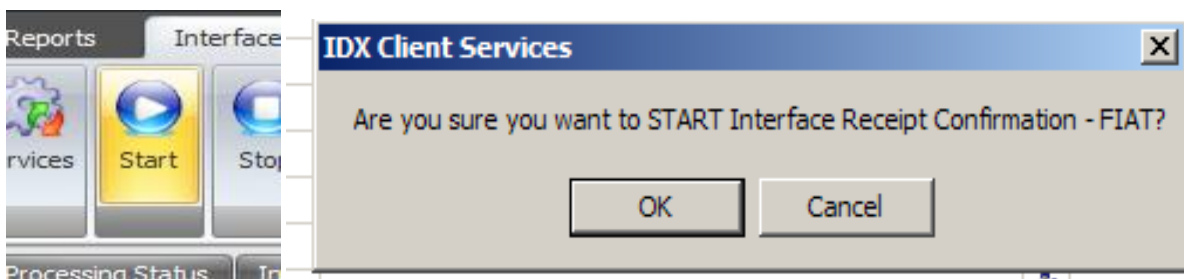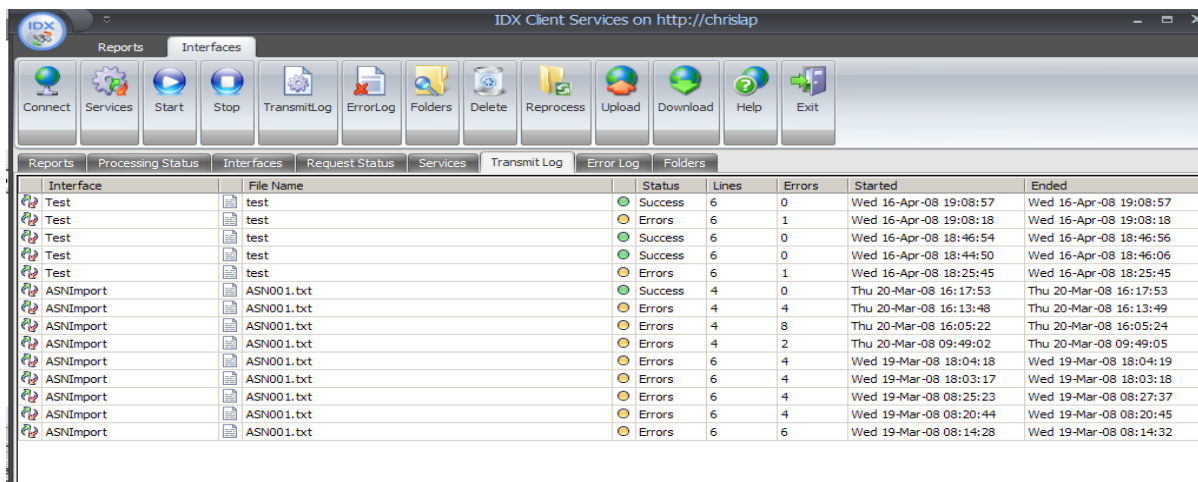


### Transmitlog

The Transmit Refresh Icon will pull all new entries from the transmitlog table into the ICS client.

This will show the status of the last 500 transmitlog entries and their run status.  This screen will be sued to look at the history of the jobs which have been processed and if there are any errors or problems associated with that interface.



The following defines the columns and what they mean:

- Interface – Will match the interface name configured in the IDX manager, and visible from the Services Tab.
- File Name – Will display the file name that was run in the interface.  This file can then be retrieved via the folders functions (described below).
- Status – The status (and colour icon) will show if the interface had no errors (SUCCESS - green) or had any errors (ERRORS - yellow).
- Lines – the number of lines that have been read in the file.
- Errors – Displays the number of Errors that were detected by the IDX macro when running.
-  Started – date/time that the interface began running
- Ended – date/time that the interface ended

These columns can be sorted by clicking in the title bar.

The next step is to drill down into the files with errors.  To do this, select the Interface Name you wish to retrieve the error log for. And then press the ErrorLog button.  This will return the error log entries for the combination interface name and file name.
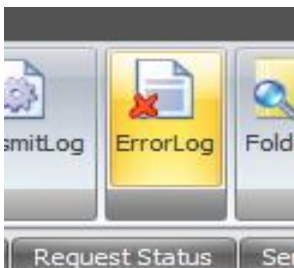


Note:  if you do not select any specific Transmitlog entry , ICS will return ALL Errors for the transmitlog entries.

This will open the Error Log screen, and the resulting Error log entries.
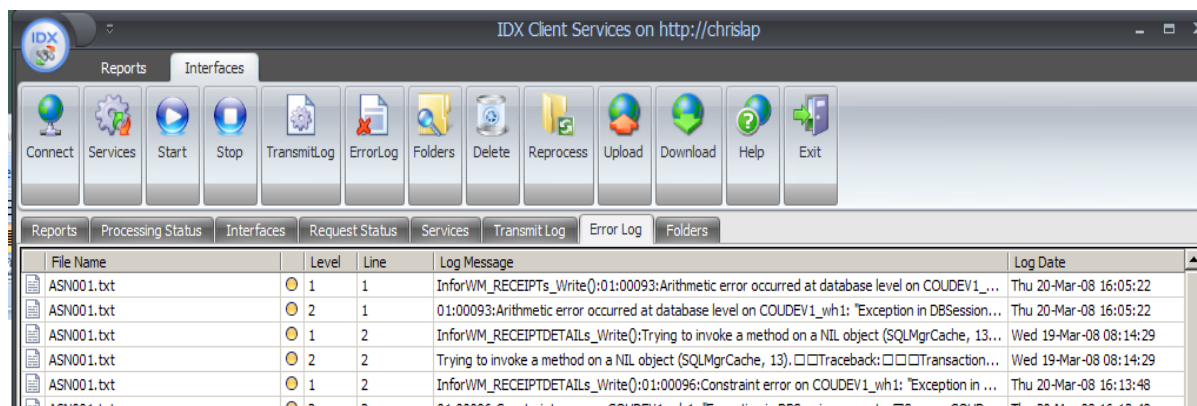
The fields displayed will then show the following fields:

- File Name – Matching the file name selected in the transmitlog screen (or all files if none were selected)
- Level – displays the Log Error level as defined in the settings in the IDX developer.
- Line – The Line number within the interface file that corresponds to the error registered above
- Log Message – This shows the error entered into the Error log table.  Any validation errors will also be displayed here (if logging level is set correctly).  Hint – Hover mouse over line to have the error message pop up.
- Log Date – Date/time the error was encountered

Use the combination of the Transmilog tab and the errorlog tab to diagnose problems with the interfaces and understand what errors are being encountered.

## Remote Folder View

By Selecting the Folder Refresh icon, will return a list of the contents of the IDX folders.  Users can then start to manage the contents of the folders, especially with regards to files which have had errors, or need to be reprocessed.

By Definition these folders represent the following and their actual locations are defined in the IDXDataFolder SQL table (shown earlier):

- Data in – The directory where inbound files are placed before processing
- Data Out – The directory where outbound files created by IDX will be placed.
- Archive – Directory where files that have been SUCCESSFULLY imported will be moved.  This folder is limited to groups of 100 records, but can be selected by user.
- Errors – This directory will contain any files that have had errors when importing. (i.e. related to the ErrorLog file name)
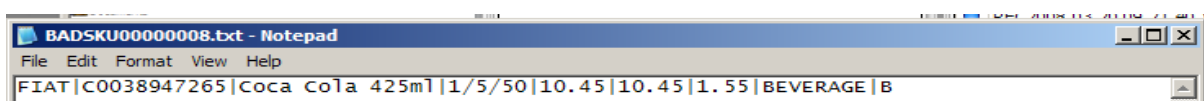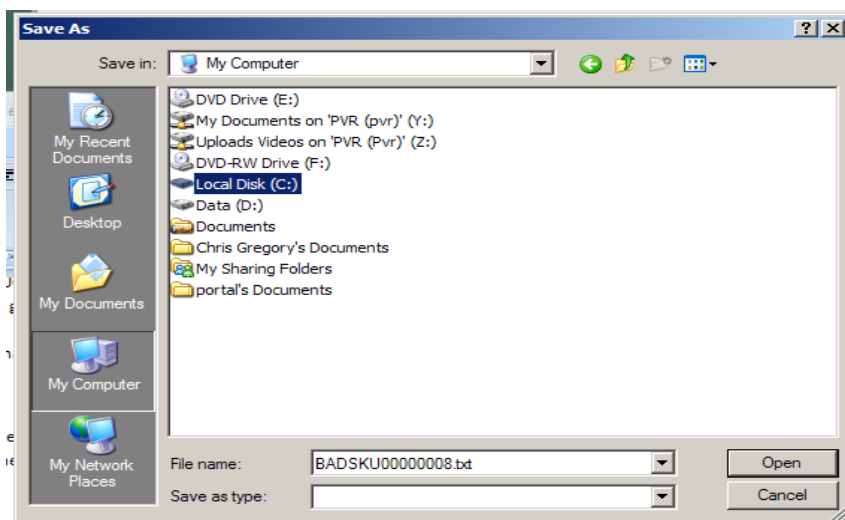


## Downloading Files

Files from these directories can be downloaded to the user's computer.  Simply select the file you wish to download and then the download button from the Refresh bar.



The file will prompt the user for the save location, and then immediately attempt to open it.

## Uploading Files

Files can also be uploaded back to the ICS server.  Usually this will be back into the datain directory for reprocessing, but can be uploaded into any directory the user selects (as long as it has been configured for uploads).

Select a file in the directory to upload into, then select the upload icon from the Refresh bar.
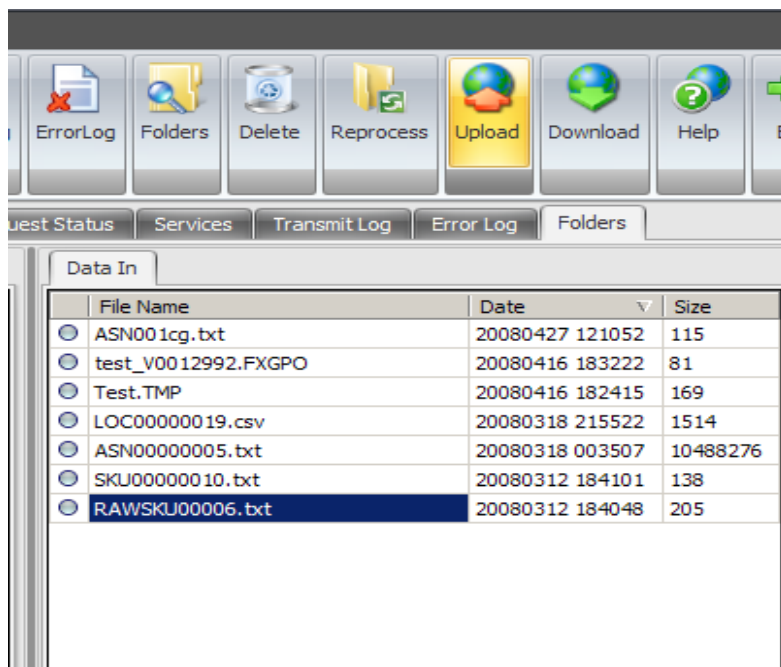


AN open file dialog box will appear.  Navigate and select the appropriate file from your system.
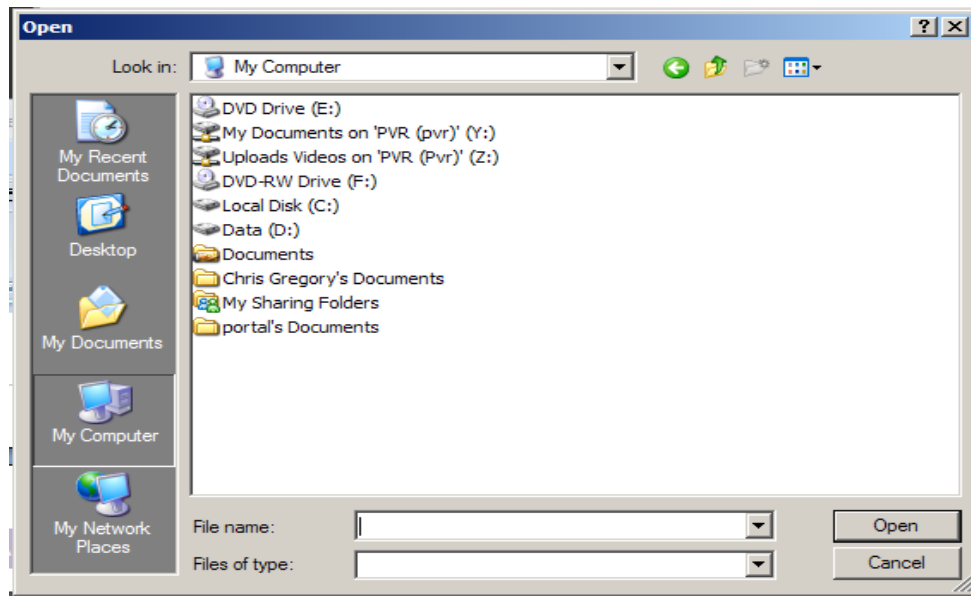
Use the Refresh FOLDERS Icon to update the contents of the folders, and the file will now appear in the appropriate directory.



## Troubleshooting

**File not found error when select View from ICS**

Make sure that the file is being generated correctly.  Ensure that the RunID being used is the same one for each step, and that the file name is called correctly.  Also, check the IDXfShedApp.exe.config to ensure paths are setup correctly. The File name can be found in the schedulejobs table in the IDX30 database.  Ensure this is the same as the generated file name.