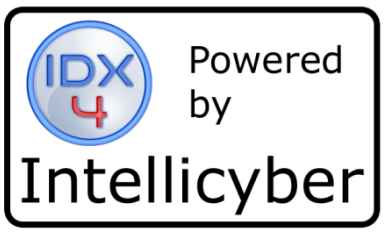
23rd February 2011

Document Version 1.2

INTELLICYBER

INTELLICYBER SCM WM PORTAL 4.0

USER GUIDE



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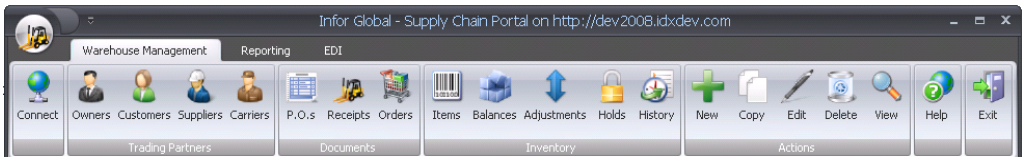
Introduction

The *Intellicyber SCM Warehouse Management Portal* allows users around the world to access, view and create supply chain documents, view and manage inventory balances, holds, history and adjustments, and print reports, labels and attachments; all via the internet.



Extend the visibility of SCM data.

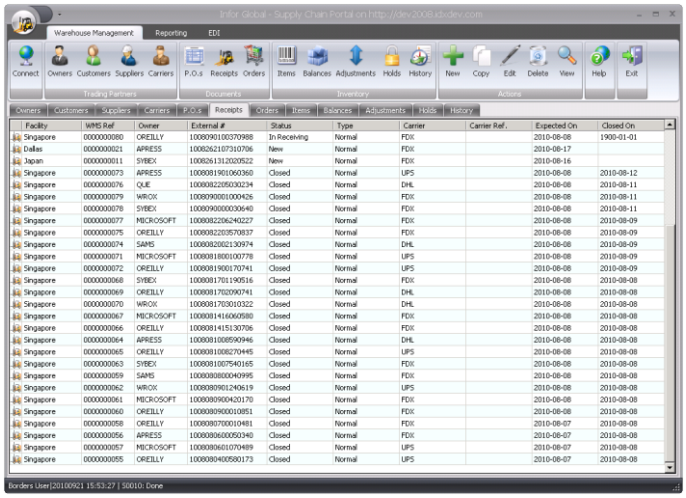
The *Infor SCM Warehouse Management Portal* leverages the accessibility of the Internet and adapters to the Infor WM, to provide supply chain partners internet access to warehouse or other inventory node data. This extended data visibility facilitates collaboration among supply chain partners and enables them to make informed business decisions quickly and more accurately.

The *Intellicyber SCM* WM *Portal* allows supply chain partners to access documents and inventory information from the Infor WM Systems to increase the integration of the supply chains for suppliers, customers and carriers.

Portal 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

The *Intellicyber SCM WM Portal* contains functionality designed to enable consolidated visibility of data from one or many Infor WM9 systems (and extendable to other Infor SCM systems), and provide the ability to create and modify documents and information in those systems.



- Global Inventory Balances across multiple warehouses
- Detailed inventory views, including holds, adjustments and history
- Purchase Orders
- Advanced Shipment Notices (ASN's)
- Customer / Shipment Orders

Getting started

To utilize Portals, users only need to install the Portal client to enable access to the WM9 inventory data, documents, reports and other information. This assumes that an administrator has configured and setup the user accounts and permissions on the Portal Server (See the Intellicyber SCM WM Portal 4.0 Administrator and Install Guide for further information on installing and configuring the Portal Server).

Installing the Portal client

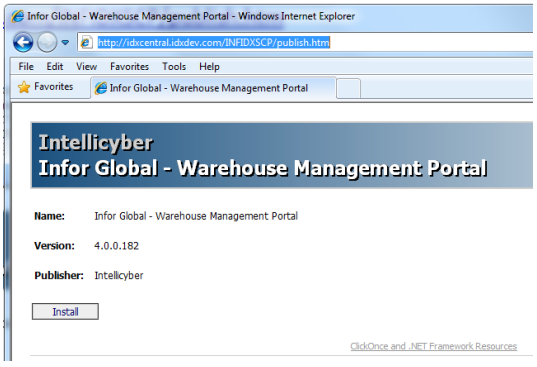
Pre-requisites:

1. Windows XP, Vista or Windows 7
2. .Net Framework 3.5 SP1 (Link to install on Portal install page)
3. Minimum screen resolution of 1024x768
4. Internet Connection

Installation Steps:

1 - On the client machine, via Internet Explorer, go to the following URL

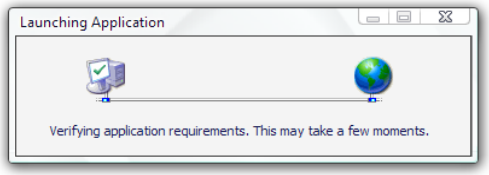
http://idxcentral.idxdev.com/INFIDXSCP/publish.htm



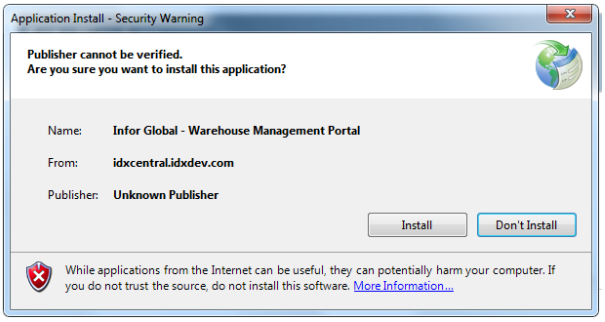
2 – IF .Net 3.5 SP1 is not detected, install using the hyperlink provided at the bottom of the page.

3 - Click the install button.

The system will verify the components installed

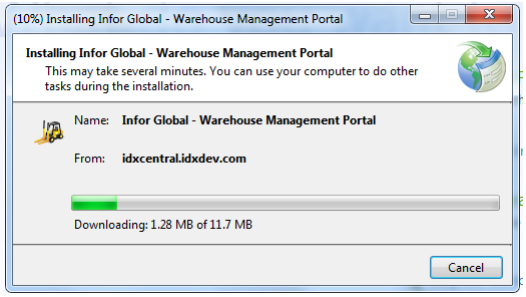


The Windows installer will then ask you to verify if you wish to install the Portal Client application

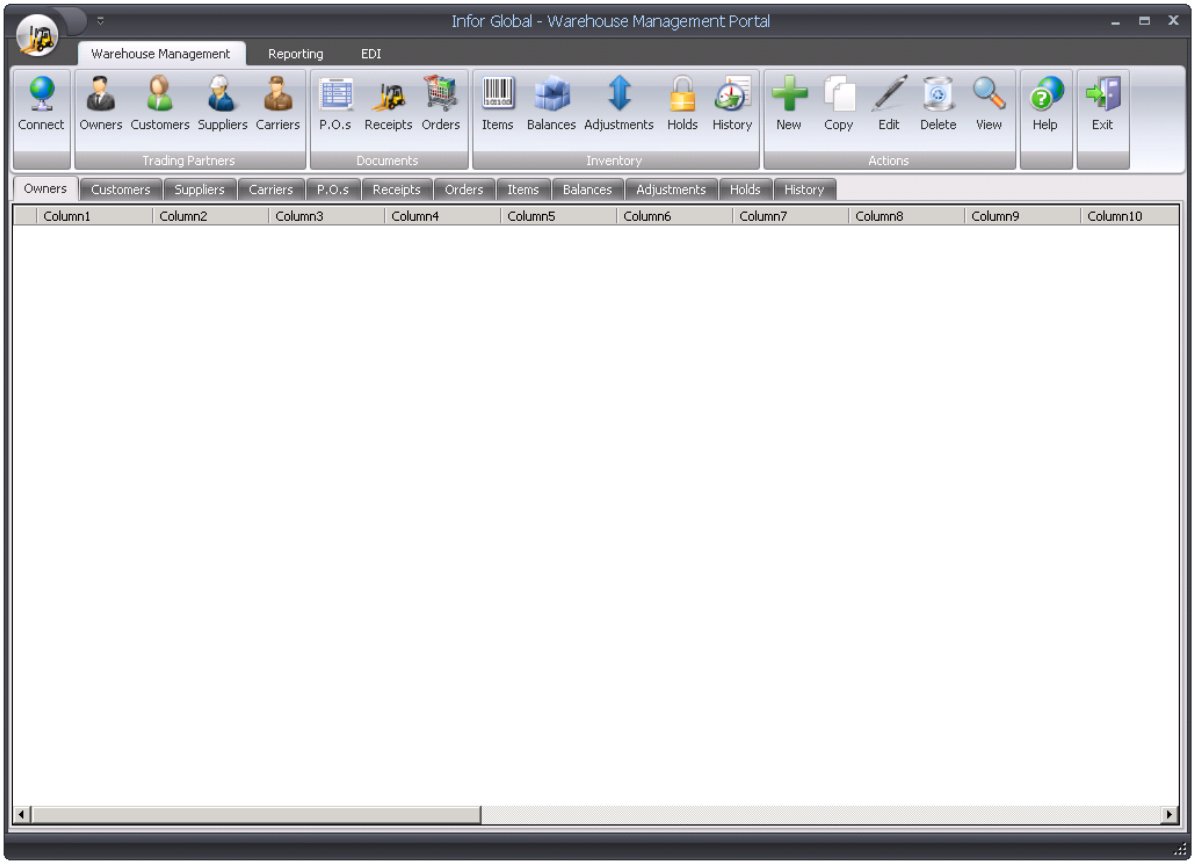


Select 'Install' to continue.

The Portal Installer will now download the application



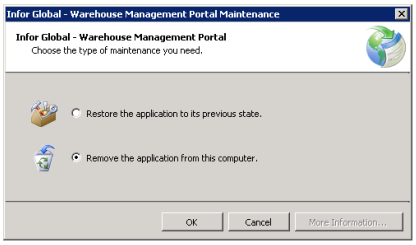
Once downloading has completed, the Portal application will launch.



Installation has completed.

Removing the Client installation.

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



Select add remove programs.

Find the 'Infor Global – Warehouse Management Portal' application, and select Change/Remove.

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

Using the Intellicyber SCM WM Portal

To start the application: select the *'Infor Global – Warehouse Management Portal'* shortcut from the start menu, it will be located in the Intellicyber program group.

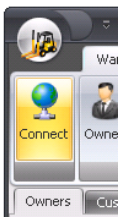
When the portal first starts, it will check for any new versions, and if it detects a new version, it will prompt the user to update.

It will open with a blank screen, as shown above.

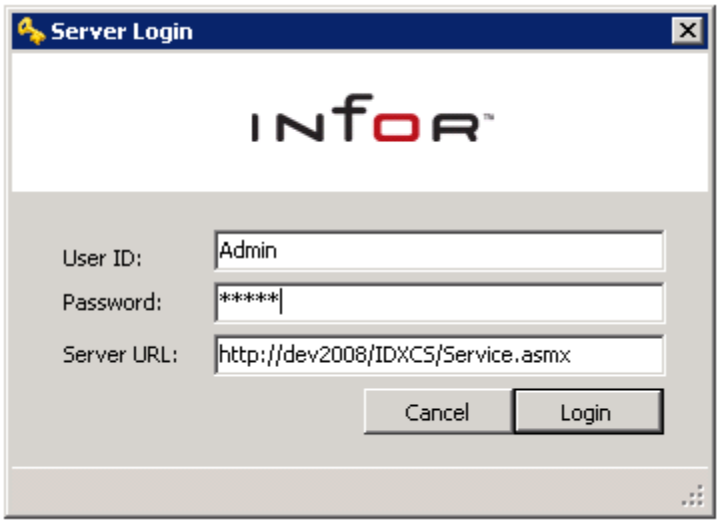
Connecting to a Portal Server

The first step is to connect to the appropriate Portal 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 Portal server to connect to.



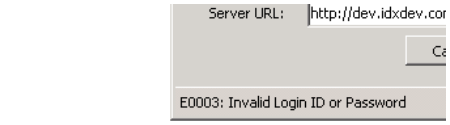
Your login and password, as well as the correct Server URL will be provided by the system administrator within your own network.

The Portal 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, you just have to enter your password (unless you want to change users or logon to a different portal server).

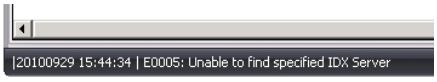
If you are successfully, you will see the status bar in the bottom right corner of the screen inform you, that you are connected correctly, and to which server you have connected.

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

User Name or Password is Incorrect:



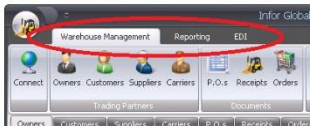
The Server URL does not match, or server is offline, or network issue:



Main Portal Navigation

Within Portal are three levels of navigation. At the highest level tabs between "Warehouse Management", "Reporting" and "EDI".

The "EDI" section is discussed in the Administrators section below.



The Next layer down contains the main **REFRESH BUTTONS.** These buttons will cause the Portal Client to download information again from the Portal Server. In Warehouse Management, selecting a REFRESH BUTTON will prompt the user to enter filter information and then the client will retrieve information from the portal server.

In the Reporting tab, selecting the 'Reports' button, will download the list of appropriate reports from the server.

Underneath the 'refresh buttons' are the NAVIGATE tabs. These move the user between data that is already in the Portal application memory, and will NOT refresh or download the data again.

Portal Warehouse Management Functions

Once you are successfully connected to a Portal Server you can retrieve document, data, and reports that are available to your user group.

Screen layout, column labels, data displayed, reports available to you, are all defined by the Portal Server Administrator (and configured according the Intellicyber SCM WM Portal 4.0 Administrator and Install Guide)

Your account may be restricted to certain data or functions only. Documents and inventory that do not match your security restrictions may not display any data.

Portals works off a centralized database which will display data from multiple warehouses and servers (depending on your security permissions), so careful attention needs to be paid to the Facility column in the lists, documents and data entry screens.

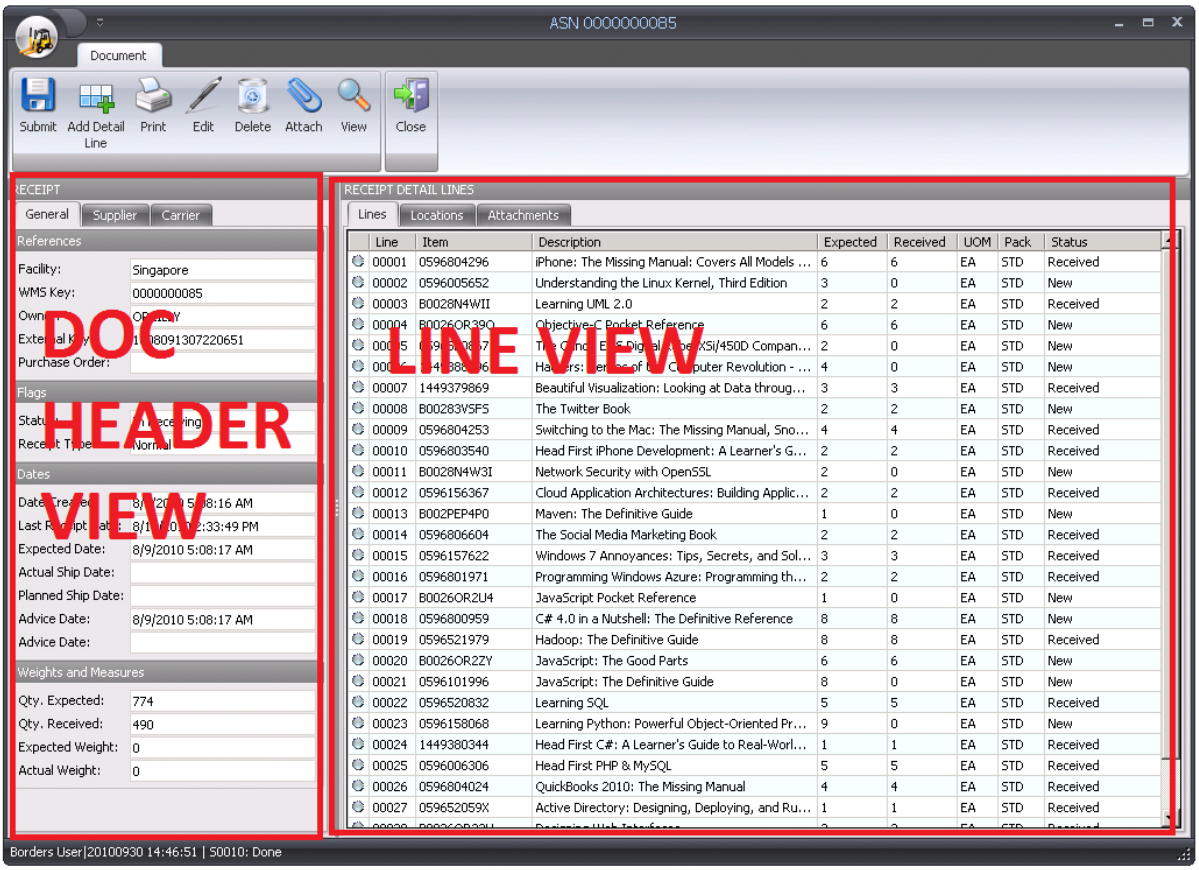
Concepts and Terms

The Refresh Buttons will prompt for filter values to narrow down the search and data displayed. When you select the Refresh button, the Filters will open a pop-up window. The values in the filter box are configured on the Portals Server by Administrators and developers, and specified for your User Group.

After entering data into the filter prompts, the Portal will retrieve data and display it in a list view.

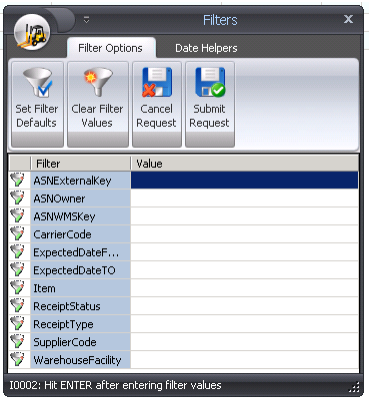
After selecting the record you want, click the 'VIEW' button, and the Document view will open.

Each document view contains Header information on the left panel, and Line information on the tabs to the right.



Each List View, Document View, Line View, Data Entry and Edit Screens, Filter lists and Reports are definable by User Group and Portal installation. Screens shown here are standard, but may not reflect the columns, data or layouts shown on your local system.

List Filters



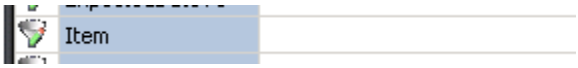
For each List view in Portals, the filter pop-up will display the possible search filters which will be used to restrict or narrow down the data.

The Filters displayed will be appropriate to the Refresh Button selected.

The filters needed will be displayed in the filter column, and the value will contain the user data needed to restrict the results.

You may enter any values into the filter values if you wish, but all data will be returned without filters. The number of rows returned may be restricted.

In the example below, an Item 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'.

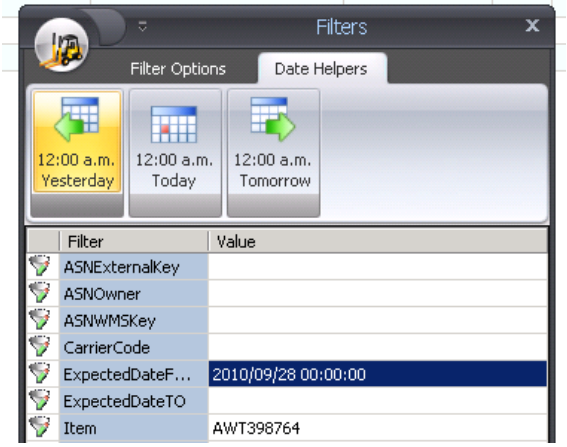
A lot of the Portal filter values for Text use the 'LIKE % xx %' function from SQL, which means that it does not have to exactly match the value to return that data. Usually these LIKE fields are for fields such as Description, Company, Address, and State. They are configurable in the Portal Server by the Portal Administrator.

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, an Expected Date From is desired to be entered. 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 Portal for submitting dates in the filter values.

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

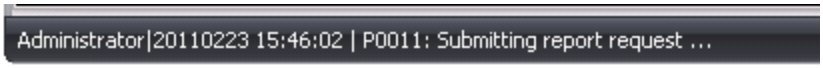
Clear Filter Values

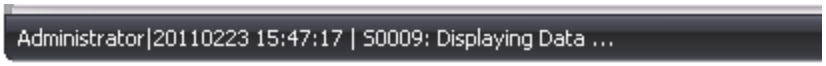
If you wish to delete all values in the filters, select the Clear Filters button from the menu ribbon. This will remove all values.

Request Submitted

Once the Filter request has been submitted, the Portal client will get the information and layout from the Portal server

For the list view, the following steps will be done and displayed in the status bar





Similar steps will be done for document and line views, depending on the document or inventory selected.

Portal Functions

The following portal functions will be restricted based on user group. The user group permissions you have will determine which views, lists and functions you have access to. Layouts, views and data may be restricted.

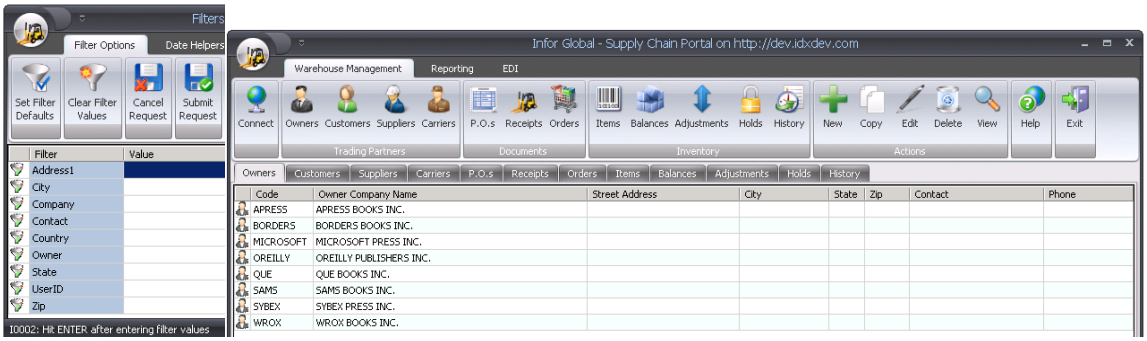
To open the list view of for each of the functions, click the large button and the filter values popup will appear. Enter any filter values needed and click the Submit button.

The Portal client will return a maximum of 200 rows for list views.

Trading Partners

Owners

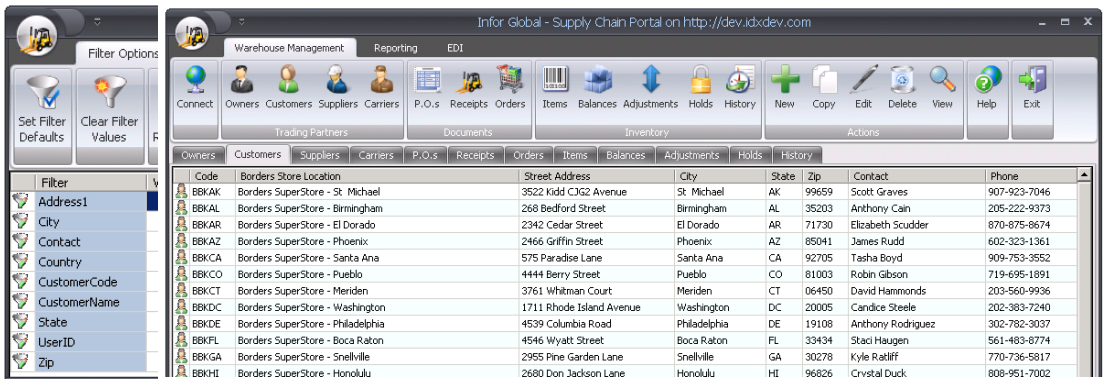
The Owners Submit Refresh button will return all appropriate Owners, and appropriate details. Filter values are typically based around Owner Keys, Company Names, Address and Contact information.



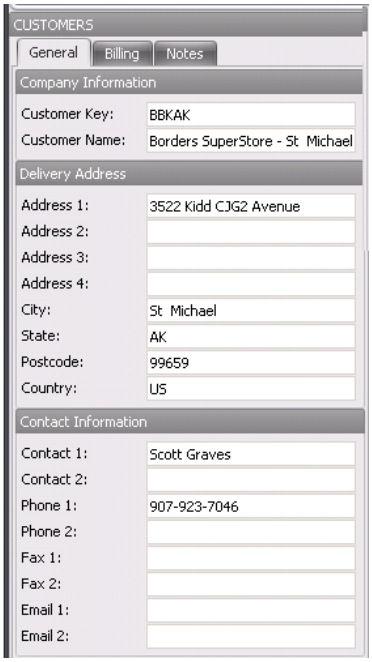
While it is possible to have an extended Owner 'Doc' view, this is not enabled by default.

Customers

The Customers Submit Refresh button will return all appropriate Customers or Consignees, and any appropriate details. Filter values are typically based around Customer Keys, Company Names, Address and Contact information.



To view the detailed Customer view, select the appropriate customer and click ‘View’.

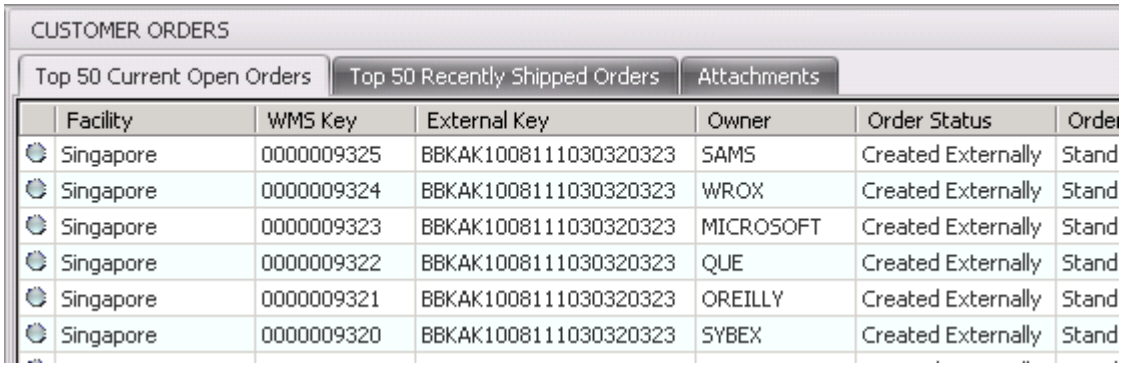


Customer Details display in the tabs on the doc header left pane. Information is available on Customer Address information, Billing Address information tab, and Notes tab.

Detailed line tabs display standard master data attachments

A Line level tab Called ‘Top 50 Current Open Orders’ shows the last 50 outstanding orders in all permissible warehouses for this customers

Another Line tab called ‘Top 50 Recently Shipped Orders’ displays the last 50 orders which have been most recently shipped from all permissible warehouses.

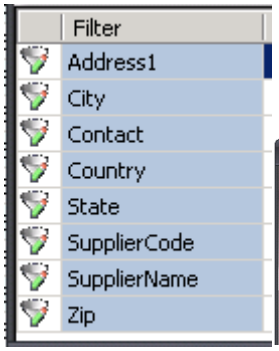


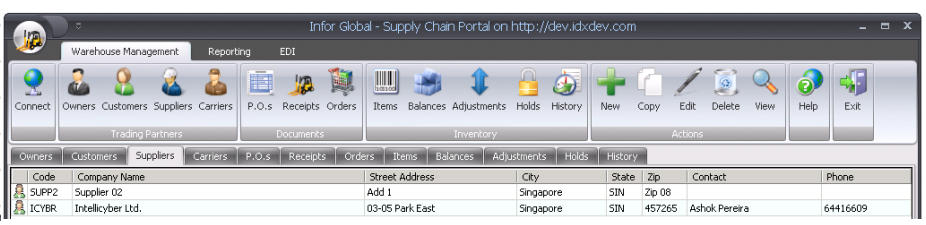
Facility	WMS Key	External Key	Owner	Order Status	Orde
Singapore	0000009325	BBKAK1008111030320323	SAMS	Created Externally	Stand
Singapore	0000009324	BBKAK1008111030320323	WROX	Created Externally	Stand
Singapore	0000009323	BBKAK1008111030320323	MICROSOFT	Created Externally	Stand
Singapore	0000009322	BBKAK1008111030320323	QUE	Created Externally	Stand
Singapore	0000009321	BBKAK1008111030320323	OREILLY	Created Externally	Stand
Singapore	0000009320	BBKAK1008111030320323	SYBEX	Created Externally	Stand

Customers can be added or deleted to and from the WMS data, using the ‘New’ and ‘Delete’ functions on the main Refresh bar. Existing Customers can be modified and edited from the detail view ‘Edit’ function.

Suppliers

The Suppliers Submit Refresh button will return all appropriate Suppliers or Vendors, and any appropriate details. Filter values are typically based around Supplier Keys, Supplier Names, Address and Contact information.





To view the detailed Supplier view, select the appropriate supplier and click ‘View’.

Supplier details display in the tabs on the doc header left pane. Information is available on supplier address information, billing address information tab, and notes tab.

Detailed line tabs display standard master data attachments

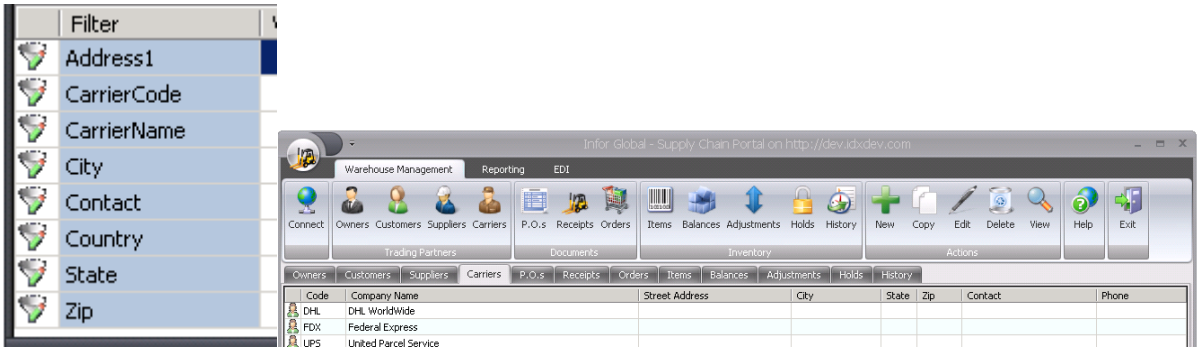
A Line level tab called 'Top 50 Current Pending Receipts' shows the last 50 Advanced Shipment Notices that have not started Receiving in all permissible warehouses for this Supplier.

Another Line tab called 'Top 50 Recently Received Receipts' displays the last 50 ASN's which have been most recently received from all permissible warehouses.

Suppliers can be added or deleted to and from the WMS data, using the 'New' and 'Delete' functions on the main Refresh bar. Existing Suppliers can be modified and edited from the detail view 'Edit' function.

Carriers

The Carrier Submit Refresh button will return all appropriate Carriers, and any appropriate details. Filter values are typically based around Carrier Keys, Carrier Names, Address and Contact information.



To view the detailed Carrier view, select the appropriate carrier and click 'View'.

Carrier details display in the tabs on the doc header left pane. Information is available on carrier address information, billing address information tab, and notes tab.

Detailed line tabs display standard master data attachments

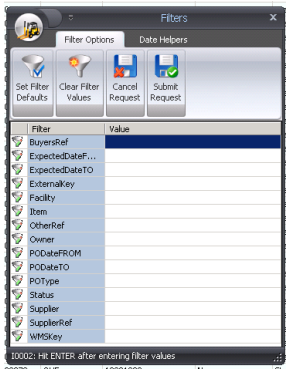
A Line level tab called 'Top 50 Current Open Receipts' shows the last 50 Advanced Shipment Notices that have not started Receiving in all permissible warehouses for this carrier.

Another Line tab called 'Top 50 Current Unshipped Orders' shows the last 50 Shipment Orders that have not been shipped in all permissible warehouses for this carrier.

Carriers can be added or deleted to and from the WMS data, using the 'New' and 'Delete' functions on the main Refresh bar. Existing carriers can be modified and edited from the detail view 'Edit' function.

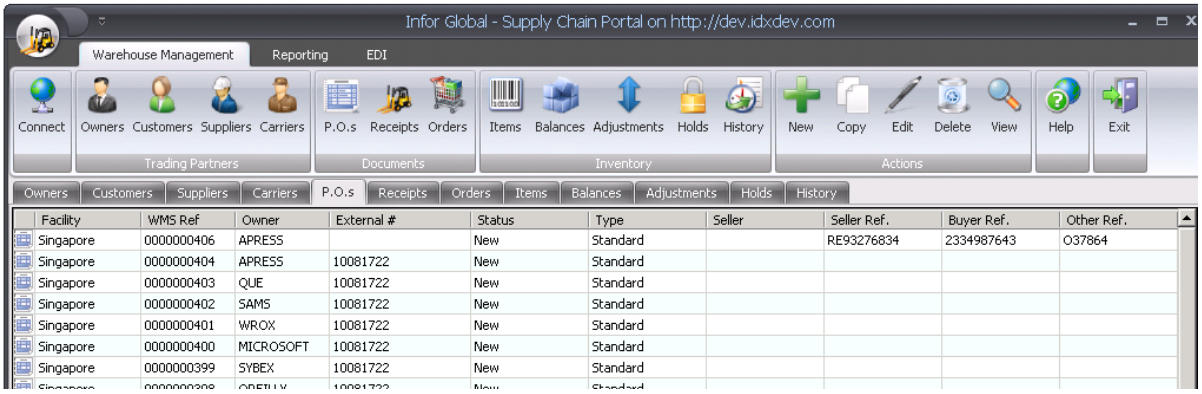
Documents

Purchase Orders

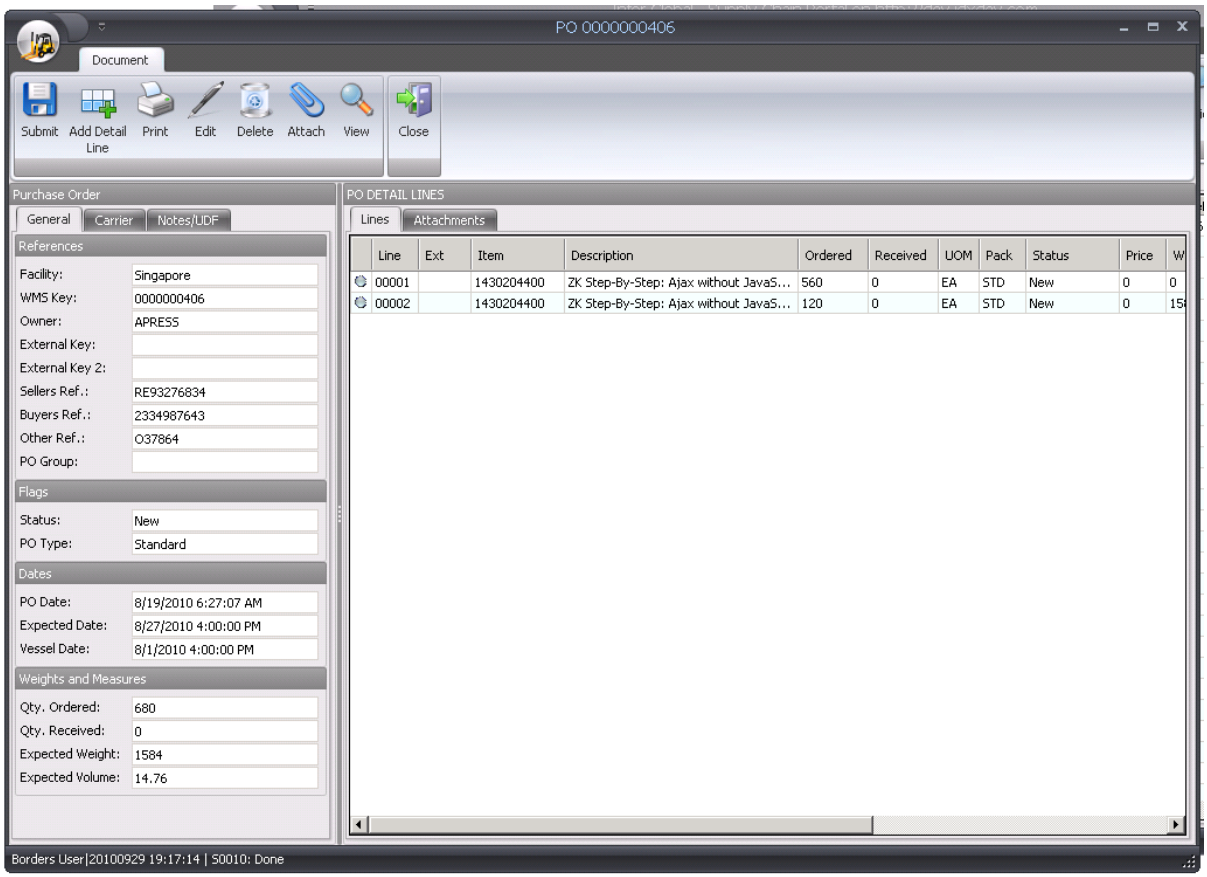


The Purchase Order Refresh Button will return Purchase Orders documents from the Portal Server.

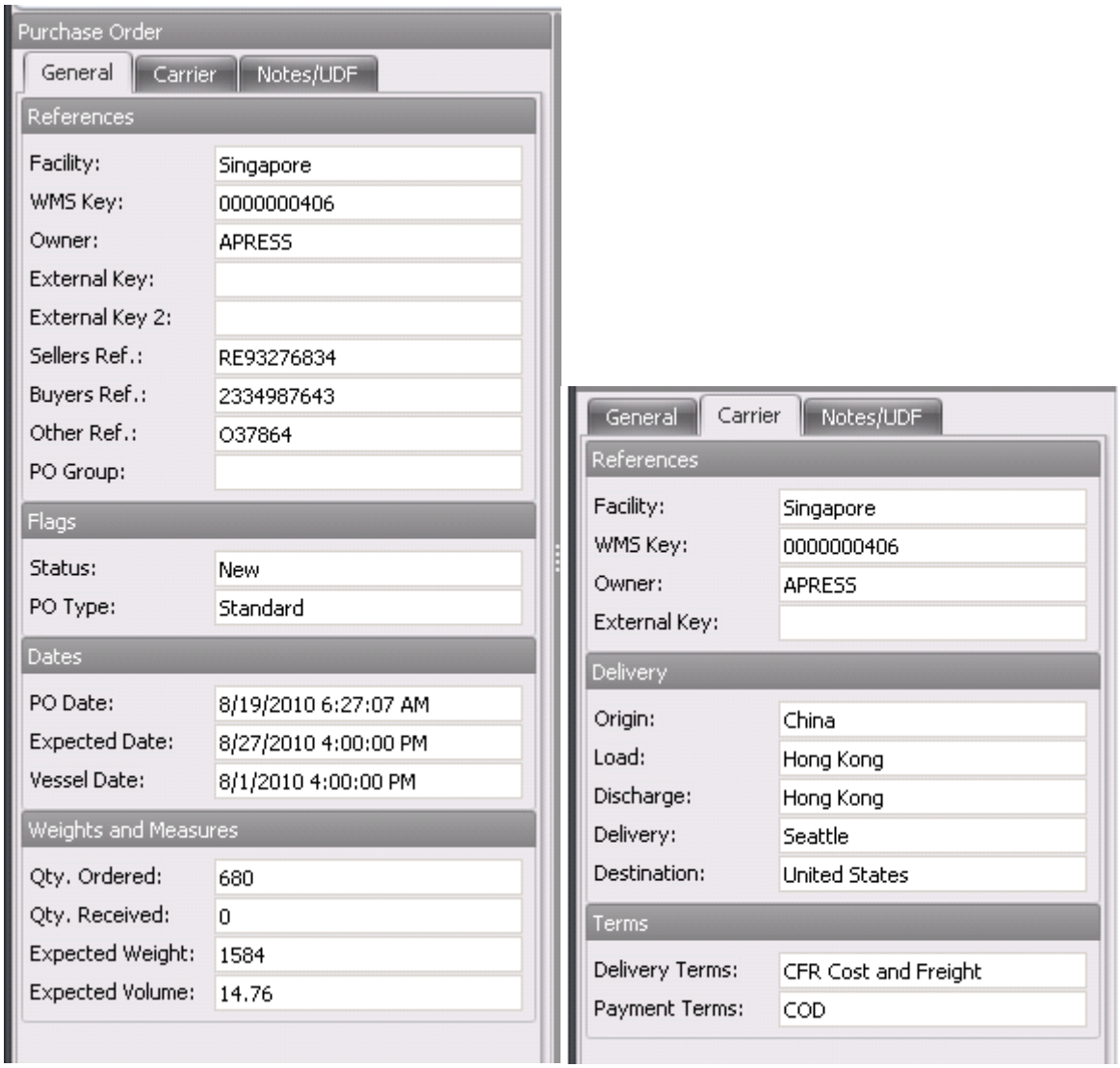
Filter values typically include WMS Reference Keys, Facility, Customer PO Number, Item (will return any PO's with that Item in the detail), Owner, Supplier, Status, Expected Dates (TO and FROM), other secondary reference numbers.



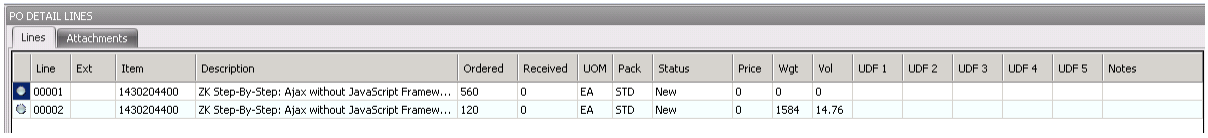
To view the detailed PO Document view, select the appropriate PO and click 'View'.



Purchase Order Header information displays in the tabs on the doc header left pane. Information is available on all the Purchase Order reference information, including primary key information Facility, Owner and WMS Keys (if the PO has been created in the WMS), and External Keys. The Current PO Status, PO Type and most of the PO dates and PO quantity, weight and cube totals are also displayed. Additional tabs include carrier transportation information and terms of delivery, and notes and user defined field information.



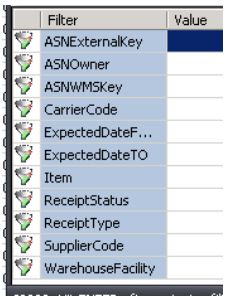
Line Level information from the PO is displayed in the Lines tab on the right.



Detailed line tabs display standard document attachments

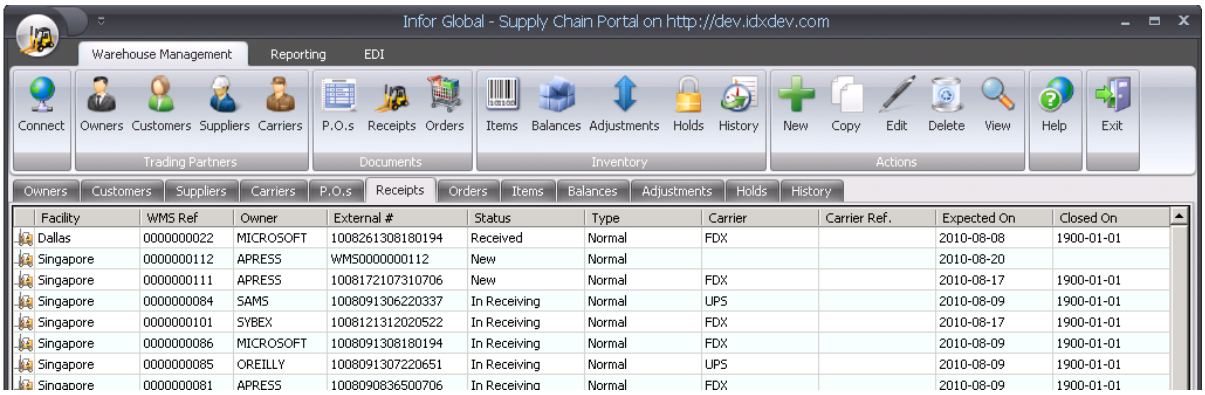
Purchase Orders can be added or deleted to and from the WMS data, using the ‘New’ and ‘Delete’ functions on the main Refresh bar. Existing Purchase Orders can be modified and edited from the detail view ‘Edit’ function.

Receipts

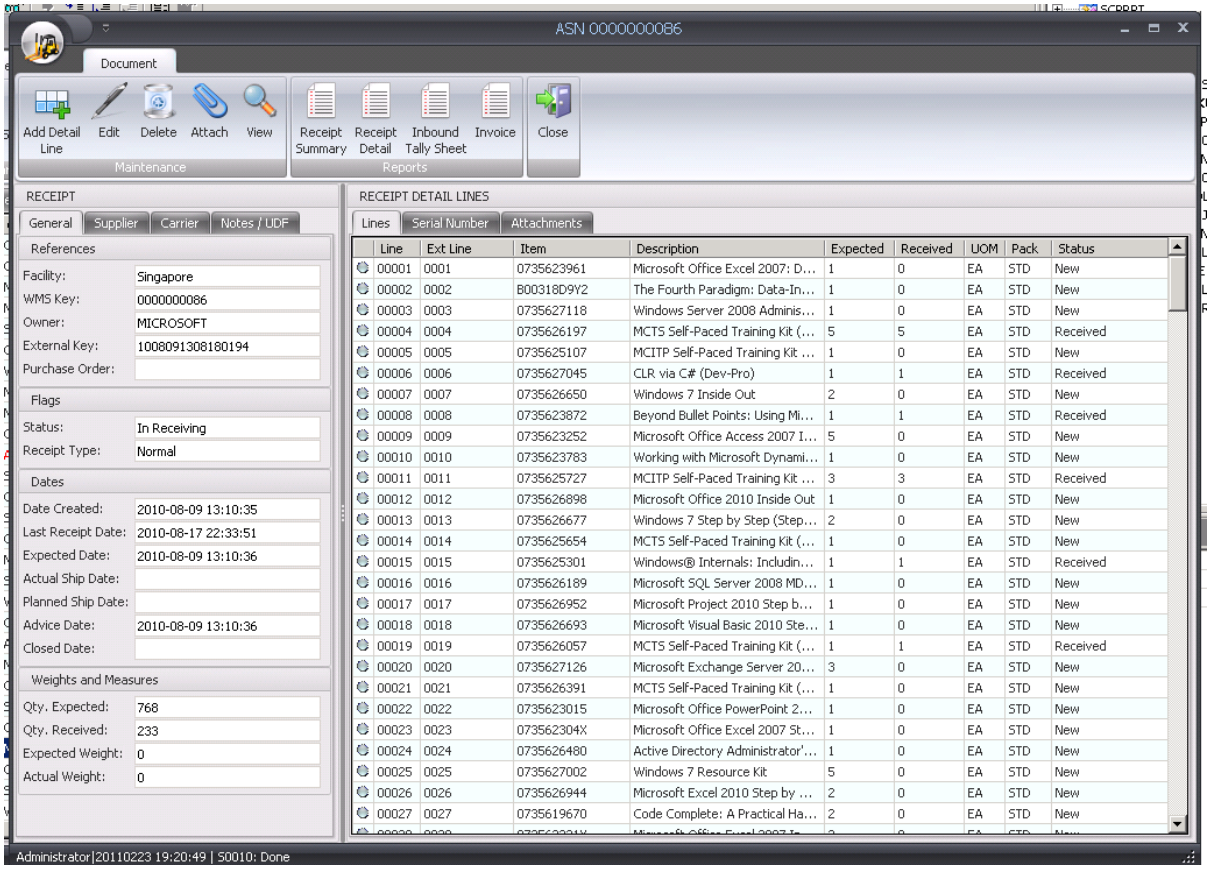


The Receipt Refresh Button will return Advanced Ship Notice (ASN) Receipt documents from the Portal Server.

Filter values typically include WMS Reference Keys, Facility, Customer Reference Number, Item (will return any ASN's with that Item in the detail), Owner, Supplier, Status, Expected Dates (TO and FROM), other secondary reference numbers.

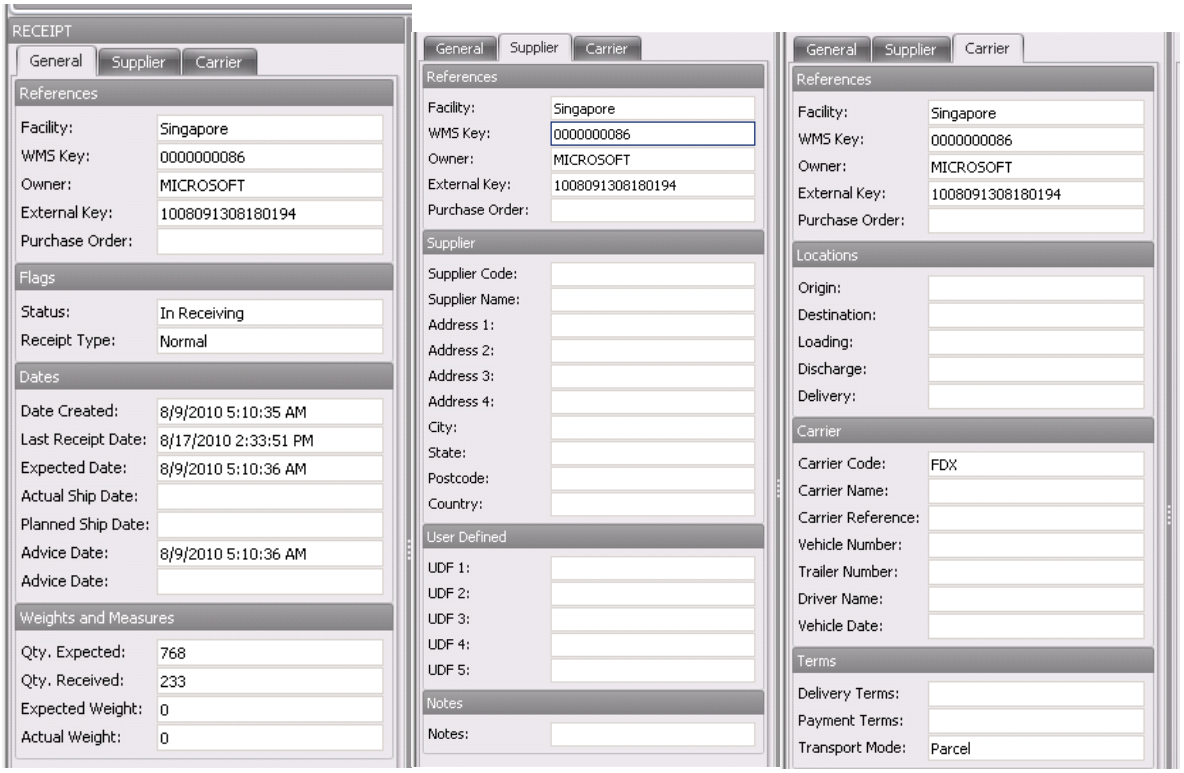


To view the detailed Receipt Document view, select the appropriate Receipt and click 'View'.

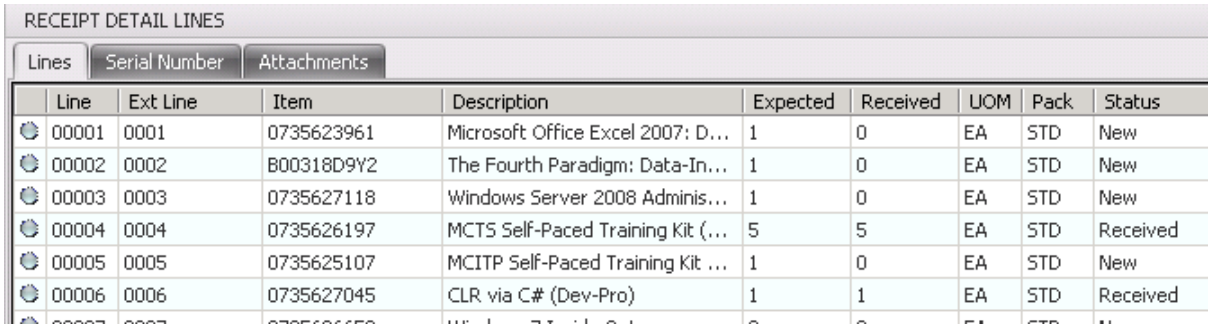


ASN Header information displays in the tabs on the doc header left pane. Information is available on all the ASN reference information, including primary key information Facility, Owner and WMS Keys (if the ASN has been created in the WMS), and External Keys. The Current ASN Status, ASN Type and

most of the ASN dates and ASN quantity, weight and cube totals are also displayed. Additional tabs include supplier information User defined fields and notes, and carrier transportation information including terms of delivery, origin destination and detailed tracking information.



Line Level information from the ASN is displayed in the Lines tab on the right.



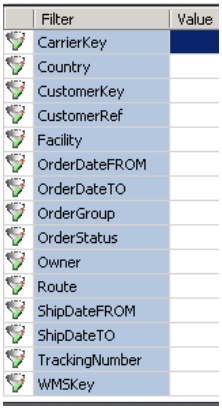
	Line	Ext Line	Item	Description	Expected	Received	UOM	Pack	Status
	00001	0001	0735623961	Microsoft Office Excel 2007: D...	1	0	EA	STD	New
	00002	0002	B00318D9Y2	The Fourth Paradigm: Data-In...	1	0	EA	STD	New
	00003	0003	0735627118	Windows Server 2008 Adminis...	1	0	EA	STD	New
	00004	0004	0735626197	MCTS Self-Paced Training Kit (...	5	5	EA	STD	Received
	00005	0005	0735625107	MCITP Self-Paced Training Kit ...	1	0	EA	STD	New
	00006	0006	0735627045	CLR via C# (Dev-Pro)	1	1	EA	STD	Received

Detailed line tabs display standard document attachments

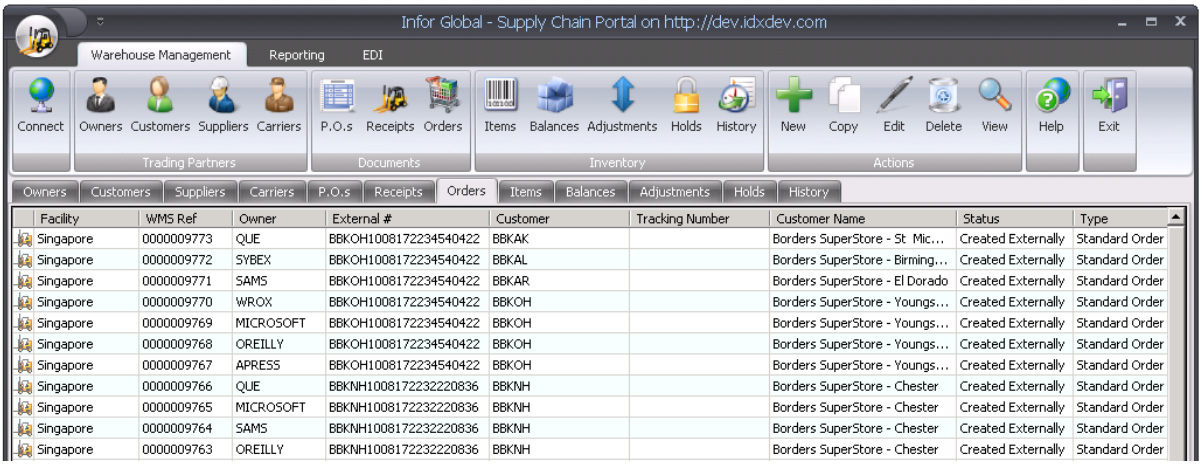
ASN Receipts can be added or deleted to and from the WMS data, using the ‘New’ and ‘Delete’ functions on the main Refresh bar. Existing ASN Receipts can be modified and edited from the detail view ‘Edit’ function.

Orders

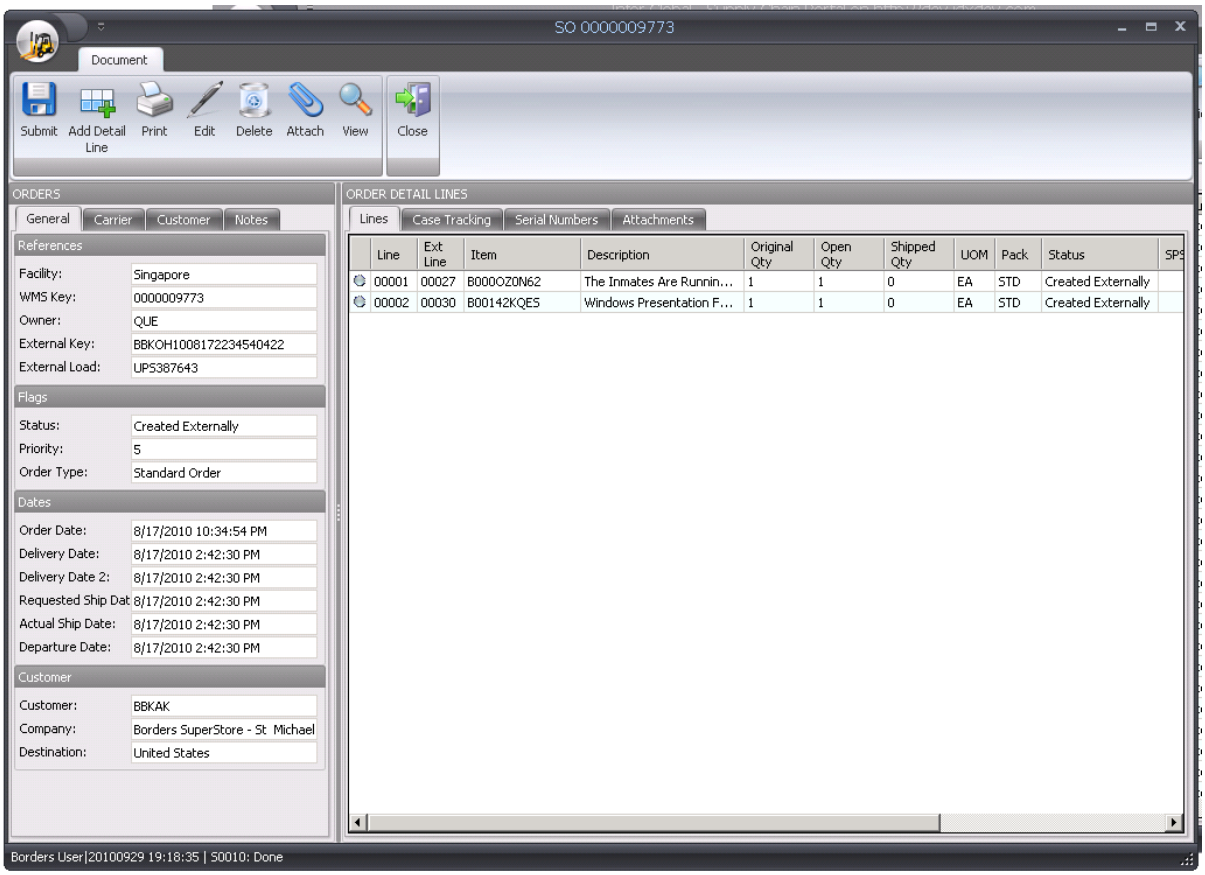
The Orders Refresh Button will return Shipment Order documents from the Portal Server.



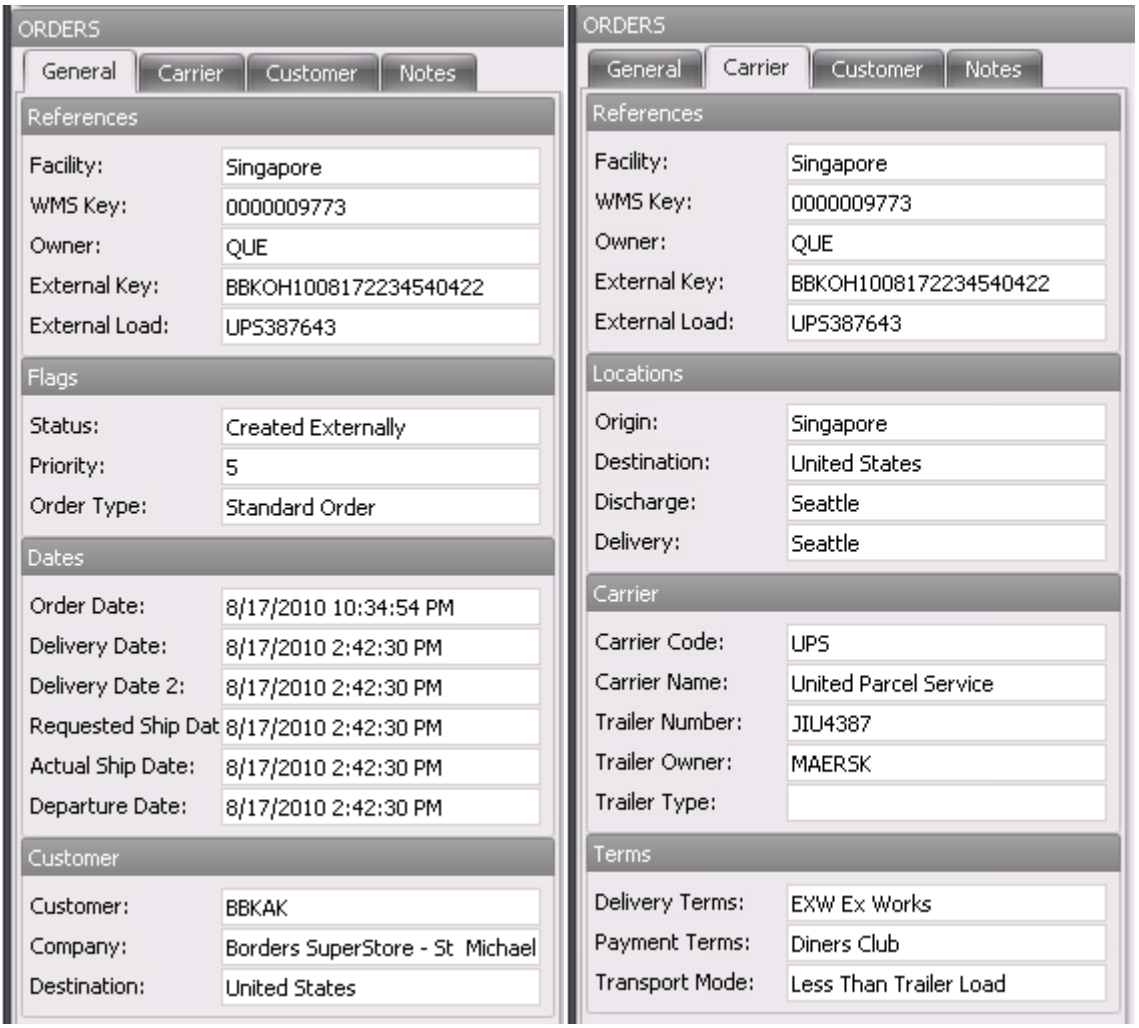
Filter values typically include WMS Reference Keys, Facility, Customer Reference Numbers, Owner, Order Status, Order Groups, Tracking Numbers, Carriers, Routes, Customers, Shipment and Order Dates (TO and FROM), other secondary reference numbers.

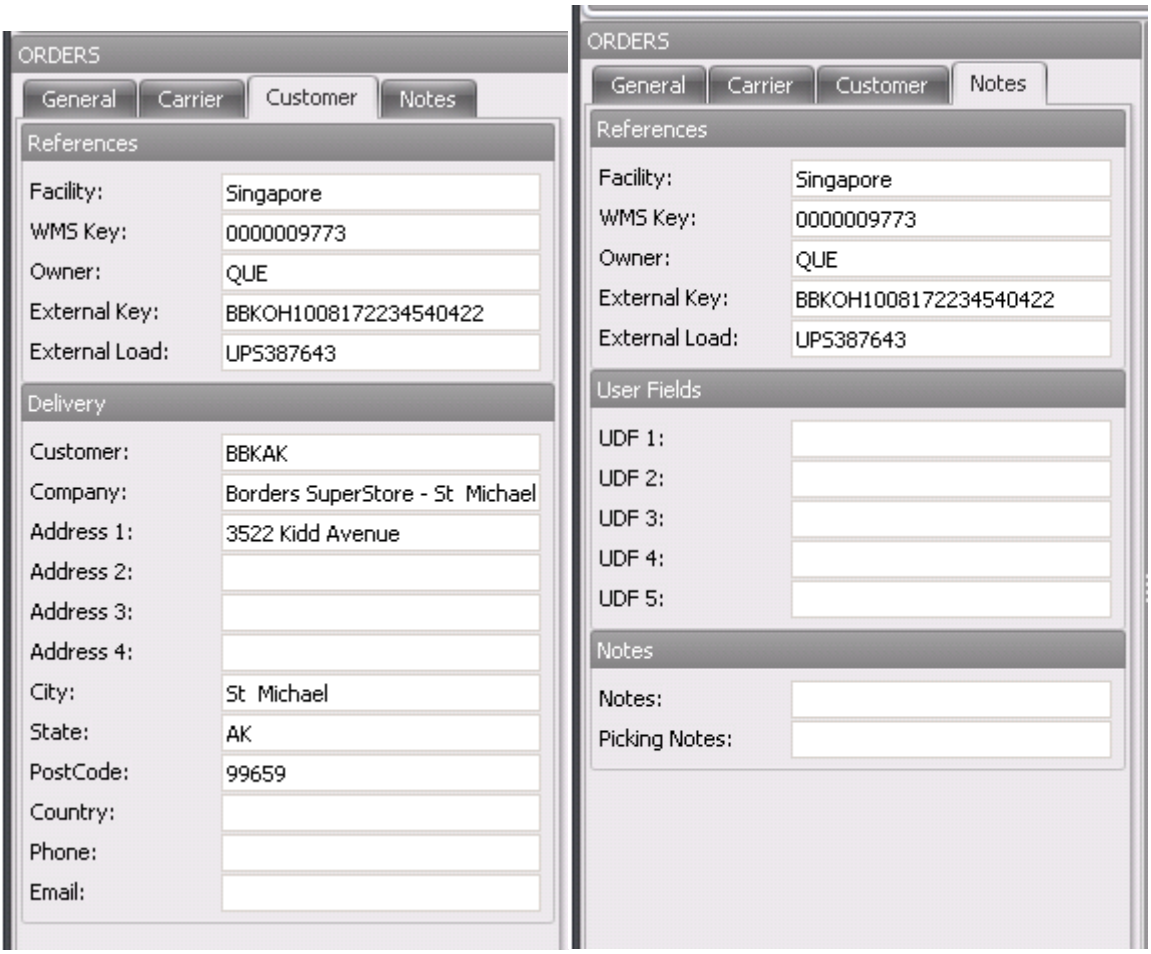


To view the detailed Order Document view, select the appropriate Order and click ‘View’.

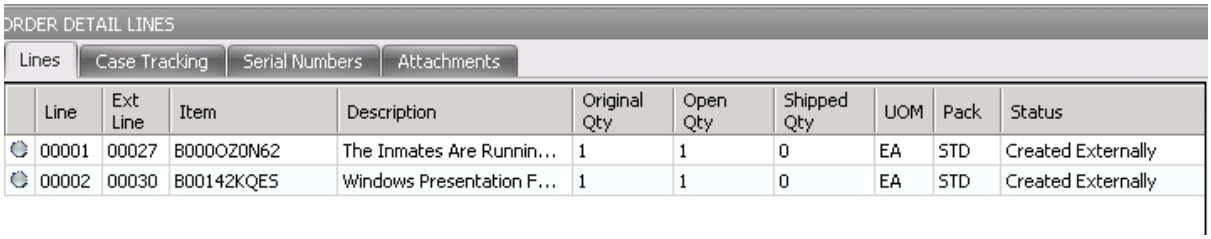


Order Header information displays in the tabs on the doc header left pane. General information is available on all the Order reference information, including primary key information Facility, Owner and WMS Keys (if the Order has been created in the WMS), and External Keys. The Current Order Status, Priority, Order Type and most of the Order dates are also displayed. A carrier transportation tab displays terms of delivery, origin destination, carrier information and detailed tracking information. The Customer tab displays the Delivery address details, and the Notes tab shows user defined fields and notes.

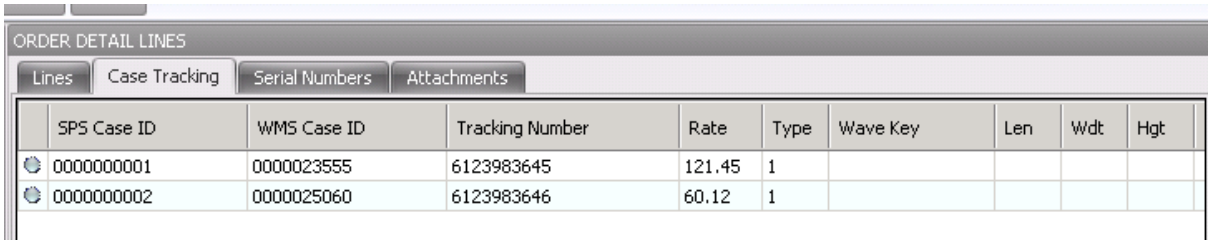

ORDERS
General
Carrier
Customer
Notes
References
Facility: Singapore
WMS Key: 0000009773
Owner: QUE
External Key: BBKOH1008172234540422
External Load: UPS387643
Flags
Status: Created Externally
Priority: 5
Order Type: Standard Order
Dates
Order Date: 8/17/2010 10:34:54 PM
Delivery Date: 8/17/2010 2:42:30 PM
Delivery Date 2: 8/17/2010 2:42:30 PM
Requested Ship Dat 8/17/2010 2:42:30 PM
Actual Ship Date: 8/17/2010 2:42:30 PM
Departure Date: 8/17/2010 2:42:30 PM
Customer
Customer: BBKAK
Company: Borders SuperStore - St Michael
Destination: United States
ORDERS
General
Carrier
Customer
Notes
References
Facility: Singapore
WMS Key: 0000009773
Owner: QUE
External Key: BBKOH1008172234540422
External Load: UPS387643
Locations
Origin: Singapore
Destination: United States
Discharge: Seattle
Delivery: Seattle
Carrier
Carrier Code: UPS
Carrier Name: United Parcel Service
Trailer Number: JIU4387
Trailer Owner: MAERSK
Trailer Type:
Terms
Delivery Terms: EXW Ex Works
Payment Terms: Diners Club
Transport Mode: Less Than Trailer Load



Line Level information from the Order is displayed in the Lines tab on the right.



The Case Tracking tab is used if the WMS is configured for Small Parcel Shipping tracking and can display related pickdetail tracking ID's.



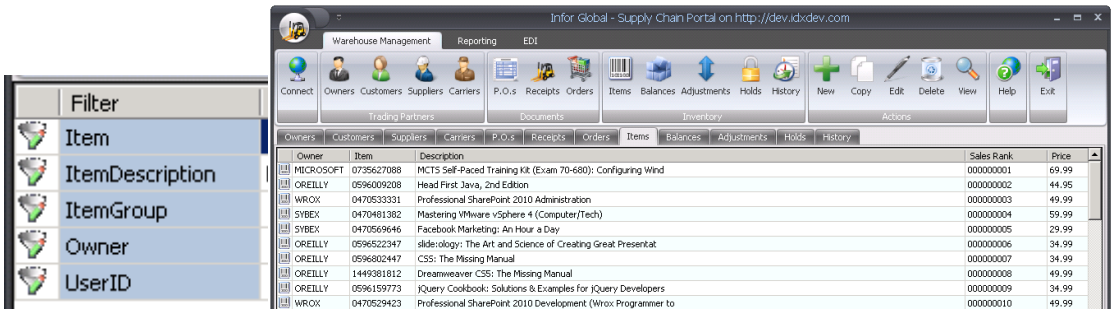
Detailed line tabs display standard document attachments

Orders can be added or deleted to and from the WMS data, using the 'New' and 'Delete' functions on the main Refresh bar. Existing Orders can be modified and edited from the detail view 'Edit' function.

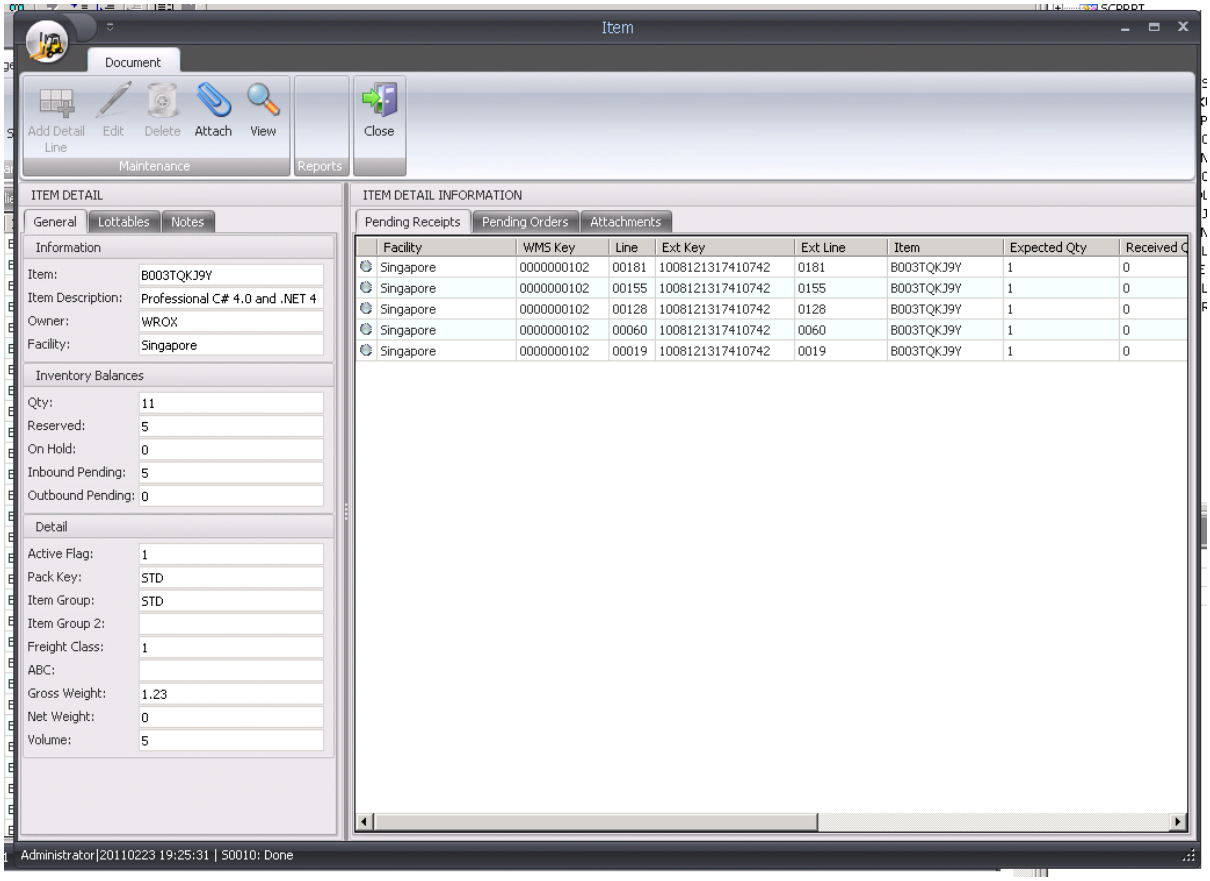
Inventory

Items

The Item Submit Refresh button will return all appropriate Items, restricted by User group, and any appropriate details. Filter values are typically based around Owners, Items, Item Description, Item Groups. By Default Item master information is viewed and inserted at the ENTPERISE level in the warehouse.



To view the detailed Item view, select the appropriate Item and click 'View'.

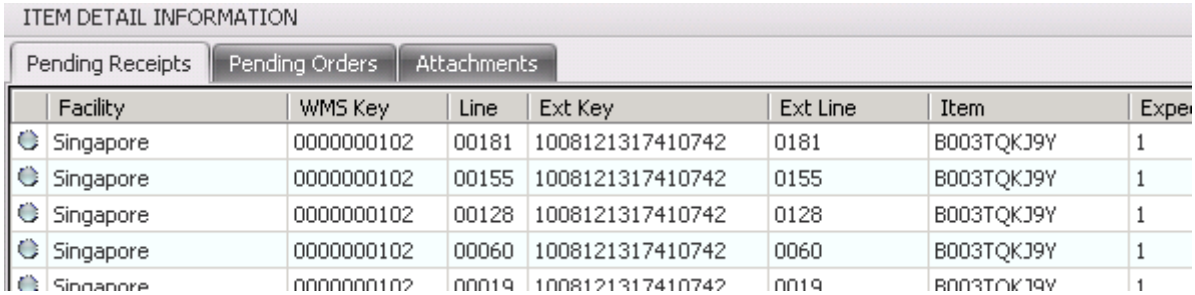


Enterprise level Item details display in the tabs on the doc header left pane. (In some facilities depending on your security permissions, it is possible to view multiple warehouse product setup from this screen. In most cases it will be based on the WMS Enterprise schema though).

Information is available on packkey, active flags, weight and cube information, User defined fields, and lot labels.

Detailed line tabs display standard master data

Line level tabs called 'Pending Receipts' and 'Pending Orders' display all inbound ASN's that are not closed, and unshipped outbound orders for that Item.

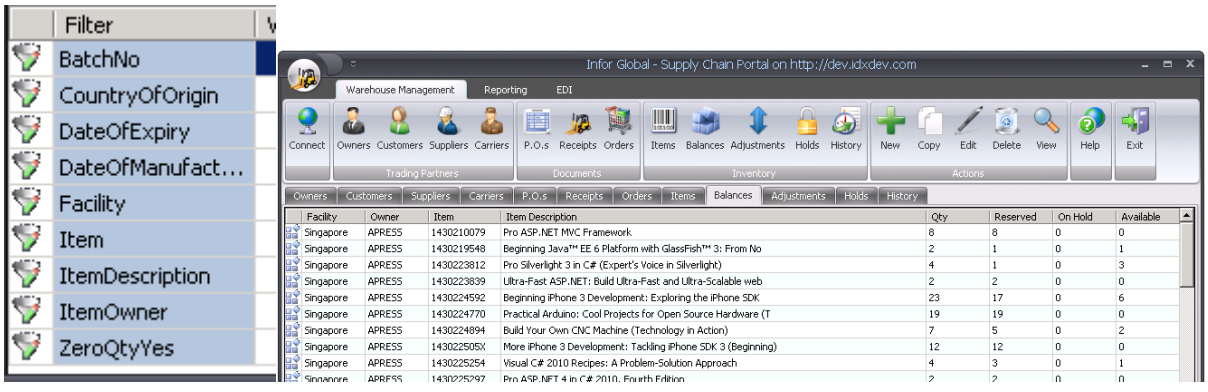


Facility	WMS Key	Line	Ext Key	Ext Line	Item	Expe
Singapore	0000000102	00181	1008121317410742	0181	B003TQKJ9Y	1
Singapore	0000000102	00155	1008121317410742	0155	B003TQKJ9Y	1
Singapore	0000000102	00128	1008121317410742	0128	B003TQKJ9Y	1
Singapore	0000000102	00060	1008121317410742	0060	B003TQKJ9Y	1
Singapore	0000000102	00019	1008121317410742	0019	B003TQKJ9Y	1

Items can be added into the WMS, using the 'New' function on the main Refresh bar. Existing Items can be modified and edited from the detail view 'Edit' function.

Balances

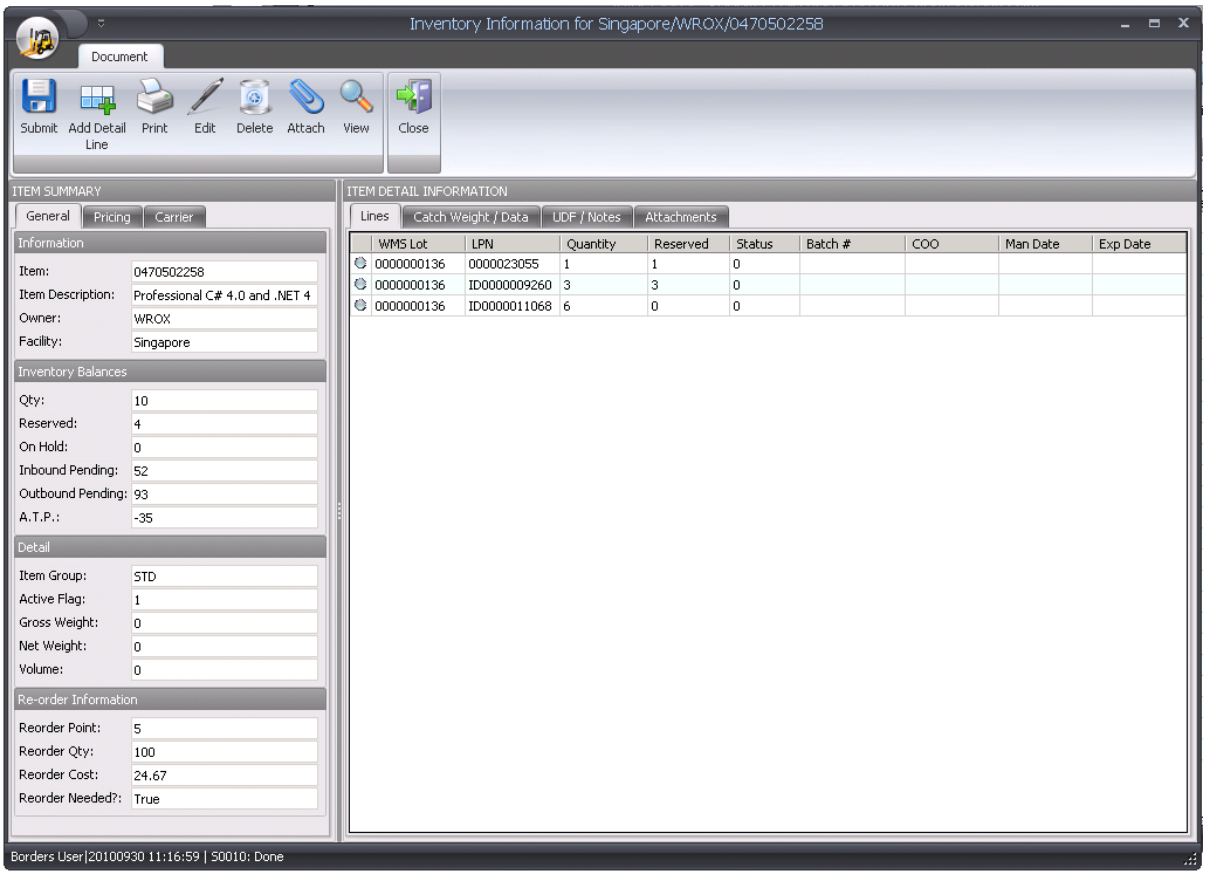
The Balance Submit Refresh button will return all appropriate Items and balance information restricted by User group, and any other appropriate details. Filter values are typically based around Facility, Owners, Items, Item Description, lot attribute (such as Expiry Date, Country of Origin, Batch Numbers), and flags to include zero quantity.



Facility	Owner	Item	Item Description	Qty	Reserved	On Hold	Available
Singapore	APRESS	1430210079	Pro ASP.NET MVC Framework	8	8	0	0
Singapore	APRESS	1430219548	Beginning Java™ EE 6 Platform with GlassFish™ 3: From No	2	1	0	1
Singapore	APRESS	1430223812	Pro Silverlight 3 in C# (Expert's Voice in Silverlight)	4	1	0	3
Singapore	APRESS	1430223839	Ultra-Fast ASP.NET: Build Ultra-Fast and Ultra-Scalable web	2	2	0	0
Singapore	APRESS	1430224592	Beginning iPhone 3 Development: Exploring the iPhone SDK	23	17	0	6
Singapore	APRESS	1430224770	Practical Arduino: Cool Projects for Open Source Hardware (T	19	19	0	0
Singapore	APRESS	1430224894	Build Your Own CNC Machine (Technology in Action)	7	5	0	2
Singapore	APRESS	143022505X	More iPhone 3 Development: Tackling iPhone SDK 3 (Beginning)	12	12	0	0
Singapore	APRESS	1430225254	Visual C# 2010 Recipes: A Problem-Solution Approach	4	3	0	1
Singapore	APRESS	1430225297	Pro ASP.NET 4 in C# 2010, Fourth Edition	2	2	0	0

In this view the Qty represents the Qty field from the WMS for that product in that facility. Multiple facilities will display their appropriate balances, depending on the user group permissions. The 'Reserved' column is a calculated field from the WMS adding 'Allocated', 'Pre-Allocated' and 'Picked'. 'On Hold' represents inventory that is unavailable, and the 'Available' represents quantity in the warehouse that should be available for shipping.

To view the detailed Balance view, select the appropriate Item and Facility and click 'View'.

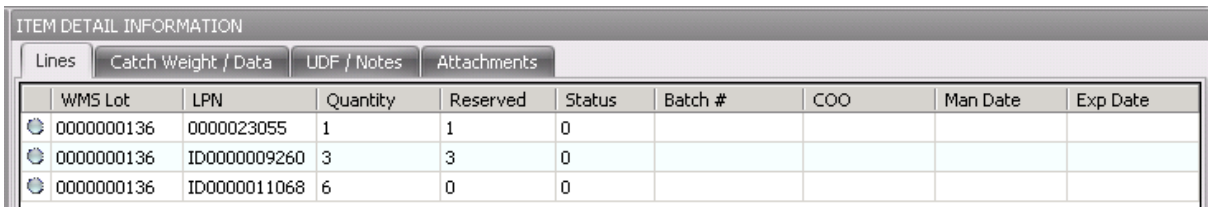


Balance Header information displays in the tabs on the doc header left pane. Information is available on Current Status of the Item in the chosen Facility. In the default view, there are some additional calculated fields for balance information that includes the following:

- Inbound Pending – Sum of all Receipt quantity for this item not received where the ASN is not closed
- Outbound Pending – Sum of all Order quantity for this item not shipped
- A.T.P. – Pseudo Available to Promise based on available warehouse data showing quantity in the warehouse minus any hold inventory minus any already being processed on orders adding in any expected receipts and removing any pending orders.
- If the A.T.P. is less than the Re-order point from the Item Master, then the 'Reorder Needed' flag will be set to TRUE.

The Header tab also includes information such as weight and volume and active flags.

Line Level information from the Item/Facility is displayed in the Lines tab on the right.

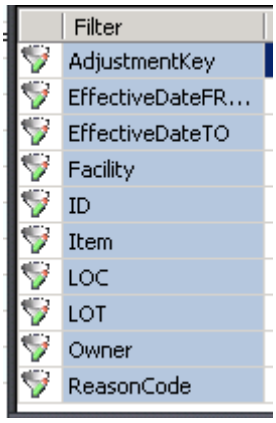


The Line level detail shows LOT level information for this item/facility. With the appropriate lot attributes displayed (Batch #, COO, Mon Date, Exp date, etc), along with the detail quantity information for that lot.

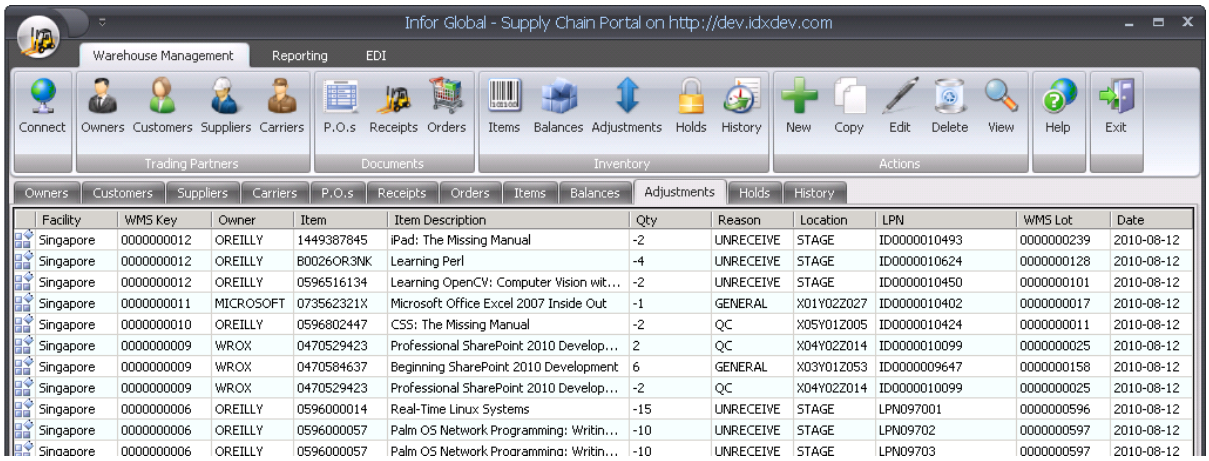
There are no edit or insert functions for balances.

Adjustments

The Adjustments Refresh Button will return Adjustment transaction documents from the Portal Server.

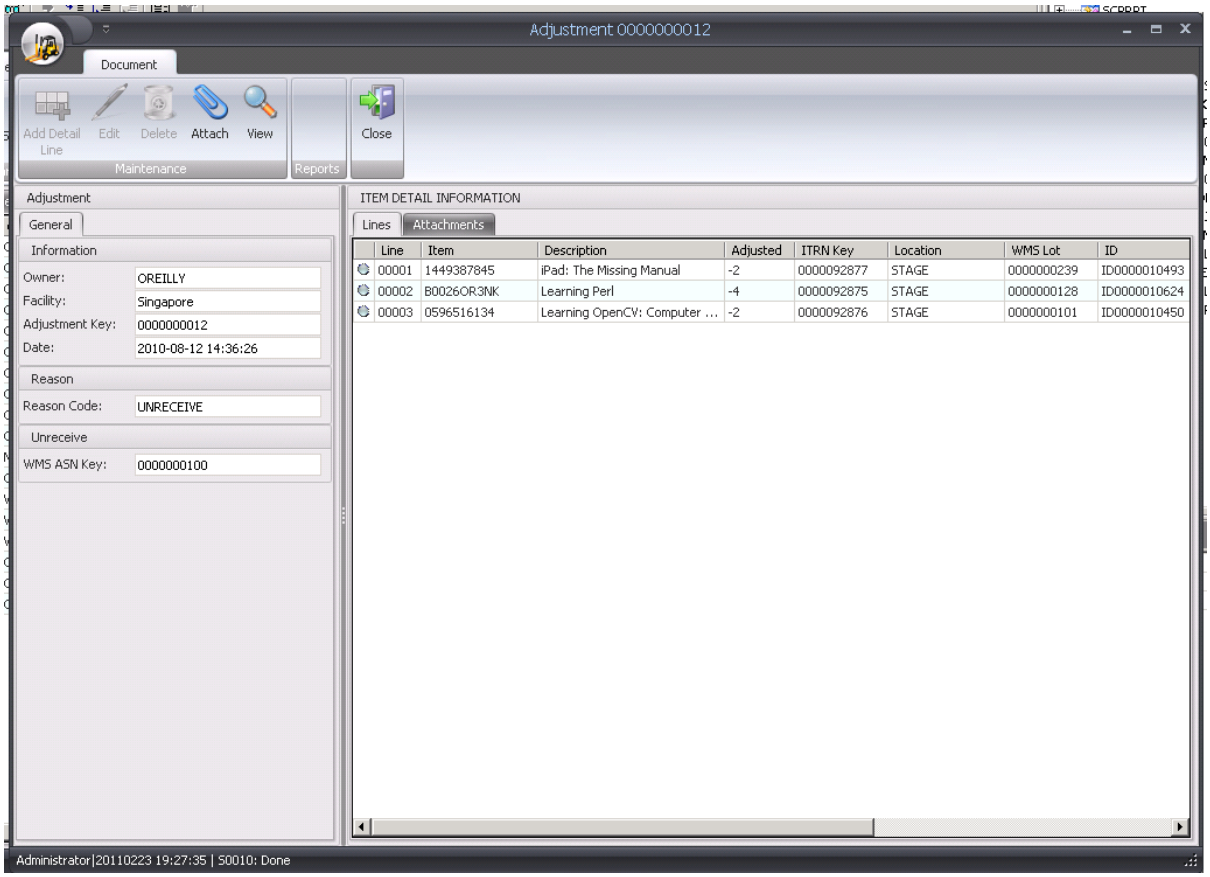


Filter values typically include WMS Reference Keys, Facility, Item, ID (LPN), Location, warehouse LOT number, or Reason Code.



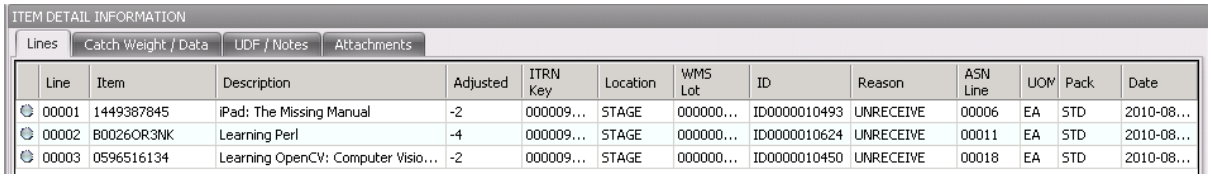
Facility	WMS Key	Owner	Item	Item Description	Qty	Reason	Location	LPN	WMS Lot	Date
Singapore	0000000012	OREILLY	1449387845	iPad: The Missing Manual	-2	UNRECEIVE	STAGE	ID0000010493	0000000239	2010-08-12
Singapore	0000000012	OREILLY	B0026OR3NK	Learning Perl	-4	UNRECEIVE	STAGE	ID0000010624	0000000128	2010-08-12
Singapore	0000000012	OREILLY	0596516134	Learning OpenCV: Computer Vision wit...	-2	UNRECEIVE	STAGE	ID0000010450	0000000101	2010-08-12
Singapore	0000000011	MICROSOFT	073562321X	Microsoft Office Excel 2007 Inside Out	-1	GENERAL	X01Y02Z027	ID0000010402	0000000017	2010-08-12
Singapore	0000000010	OREILLY	0596802447	CSS: The Missing Manual	-2	QC	X05Y01Z005	ID0000010424	0000000011	2010-08-12
Singapore	0000000009	WROX	0470529423	Professional SharePoint 2010 Develop...	2	QC	X04Y02Z014	ID0000010099	0000000025	2010-08-12
Singapore	0000000009	WROX	0470584637	Beginning SharePoint 2010 Development	6	GENERAL	X03Y01Z053	ID0000009647	0000000158	2010-08-12
Singapore	0000000009	WROX	0470529423	Professional SharePoint 2010 Develop...	-2	QC	X04Y02Z014	ID0000010099	0000000025	2010-08-12
Singapore	0000000006	OREILLY	0596000014	Real-Time Linux Systems	-15	UNRECEIVE	STAGE	LPN097001	0000000596	2010-08-12
Singapore	0000000006	OREILLY	0596000057	Palm OS Network Programming: Writin...	-10	UNRECEIVE	STAGE	LPN09702	0000000597	2010-08-12
Singapore	0000000006	OREILLY	0596000057	Palm OS Network Programming: Writin...	-10	UNRECEIVE	STAGE	LPN09703	0000000597	2010-08-12

To view the detailed Adjustment Document view, select the appropriate Adjustment and click 'View'.



Adjustment Header information displays in the tabs on the doc header left pane. General information is available on all the Adjustment reference information, including primary key information Facility, Owner and WMS Keys, and Adjustment Date. The Adjustment Reason Code is also displayed. If the adjustment is a document with multiple items, the WMS ASN Key will be populated, and the line item information will show all adjustments done on the Adjustment with the selected item. If the adjustment is a single adjustment and not linked to a document, the line item will just display the single record.

Line Level information from the Adjustment is displayed in the Lines tab on the right.



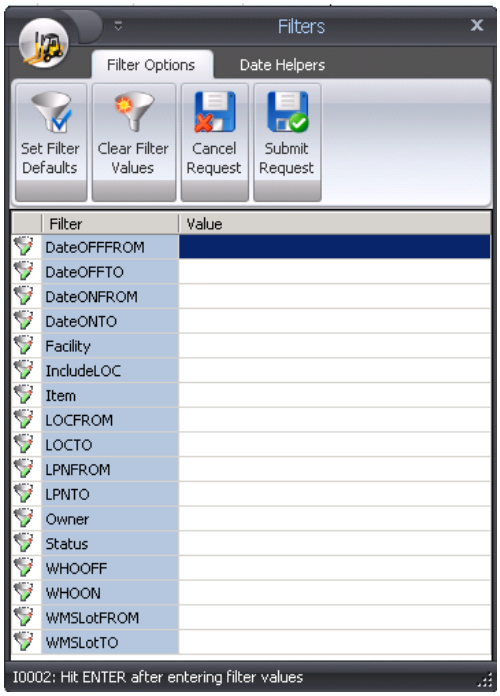
Detailed line tabs display standard document attachments

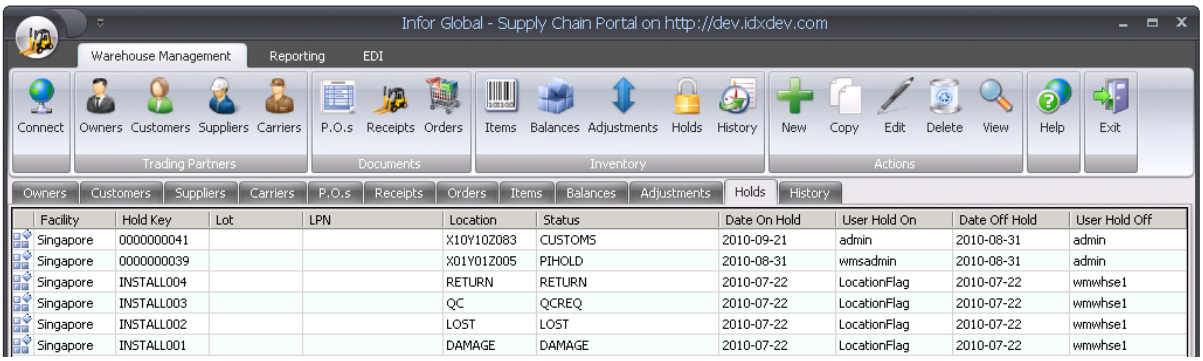
Adjustments can be added to and from the WMS data, using the 'New' functions on the main Refresh bar. Adjustments cannot be deleted. Adjustments cannot be edited or changed.

Holds

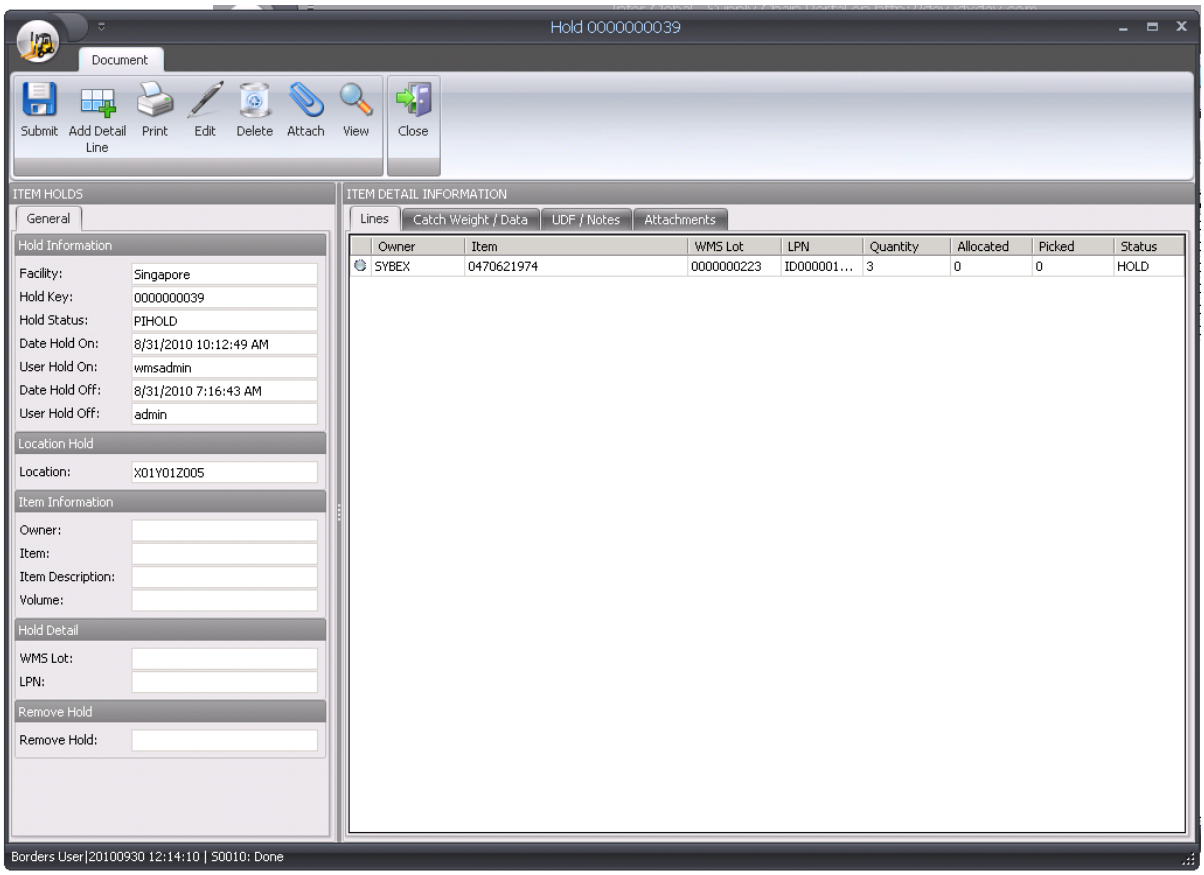
The Holds Refresh Button will return Hold information from the Portal Server.

Filter values typically include Facility, Owner, Item, ID/LPN (FROM and TO), Location (FROM and TO), warehouse LOT number (FROM and TO), User who placed the hold on/off, Current Hold Status and Reason Code. A Flag for IncludeLOC allows override to display the system LOC holds as well in the returned result. Holds in the WMS are set by WMS LOT, Location or ID/LPN. These are the primary filter values used. Additional fields are sub lookups or additional data filters.



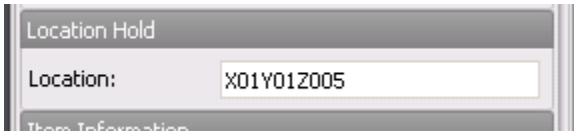


To view the detailed Hold Document view, select the appropriate Hold and click ‘View’.

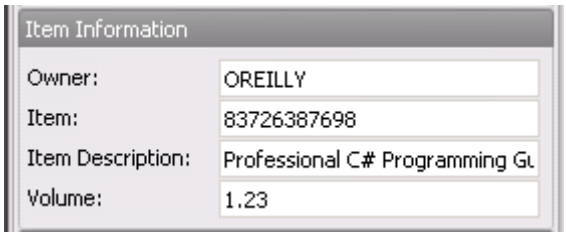


Hold Header information displays in the tabs on the doc header left pane. General information is available on the Hold reference information, including primary key information Facility, Hold Status, the Date and user who placed the hold on and off. The Detailed section in the General tab under that will relate to the specific hold information depending on the type of hold.

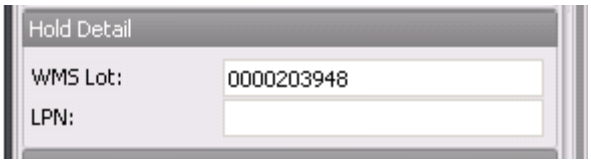
If it is a Location Hold, the Location will be populated.



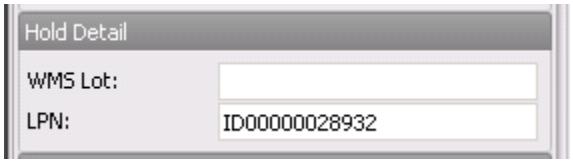
If it's a product hold (LOT or ID) then the Item Information will be populated.



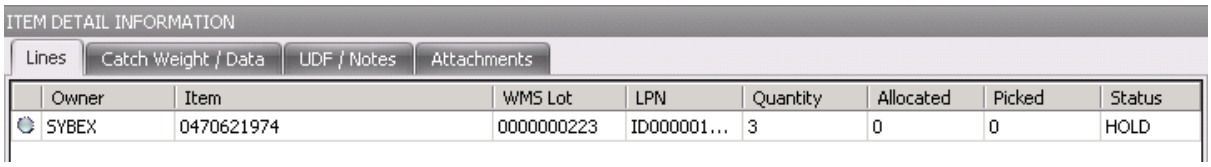
If the hold is a WMS LOT hold, then the LOT number will be populated



If it's a pallet hold, the LPN will be populated

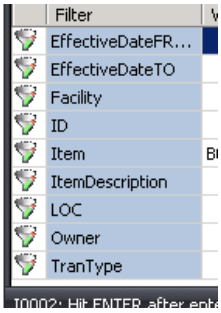


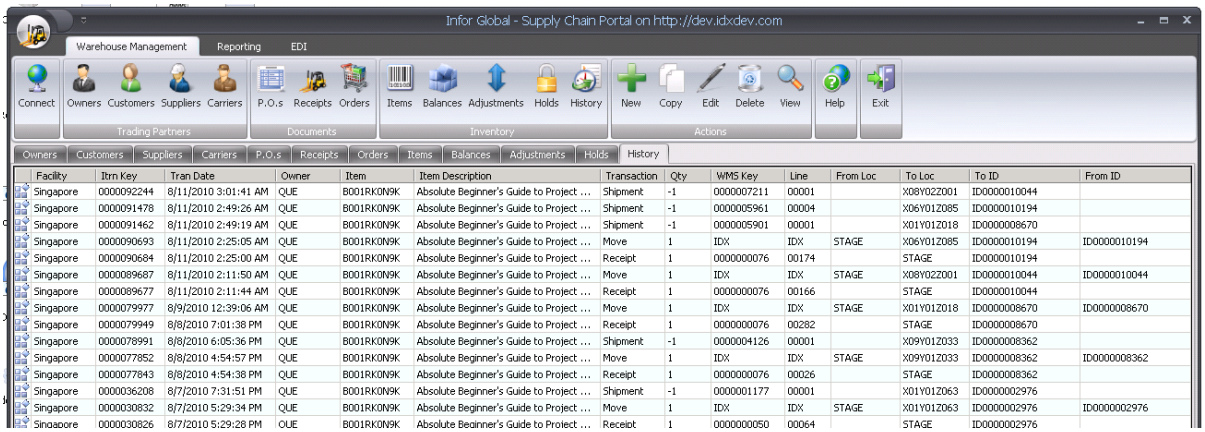
Line Level information from the Hold is displayed in the Lines tab on the right. This will depend on the type of hold. For example a LOT hold will display all other LOT information, if it's a LOC hold, then it will display all other items in that LOC.



History

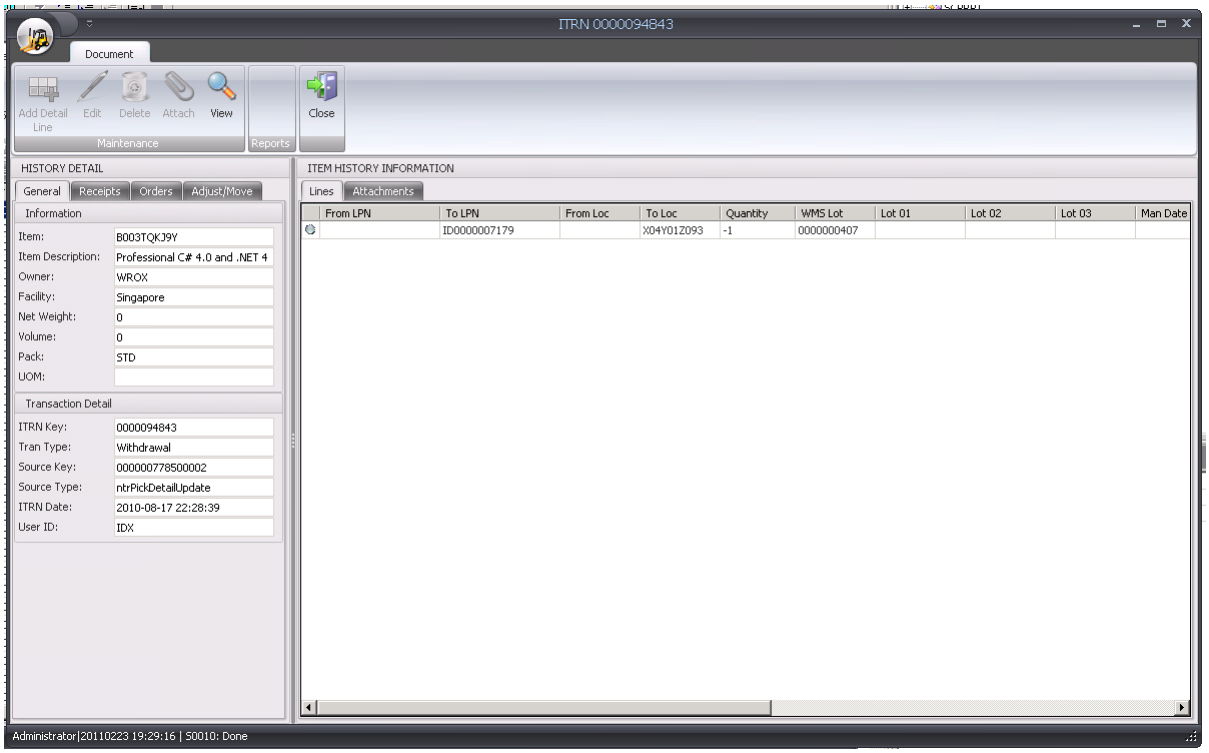
The History Submit Refresh button will return all appropriate Items and transactional information restricted by User group, and any other appropriate details. Filter values are typically based around Facility, Owners, Items, Item Description, locations, ID/LPN's and effective dates (FROM and TO).





In this view the inventory transactions from the selected data will display, ordered by transaction date descending. The transaction type will display along with appropriate WMS keys, Loc and ID data and quantity.

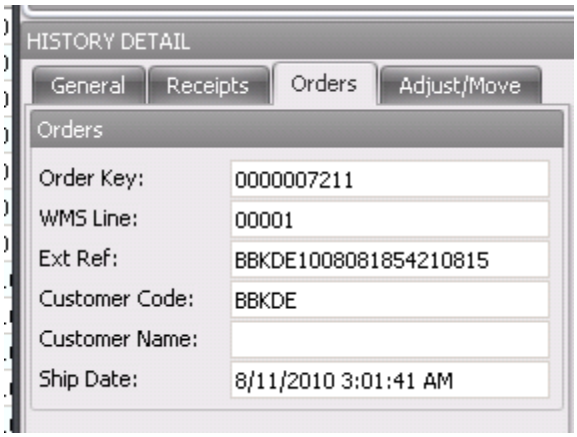
To view the detailed History view, select the appropriate Item and Facility and click 'View'.



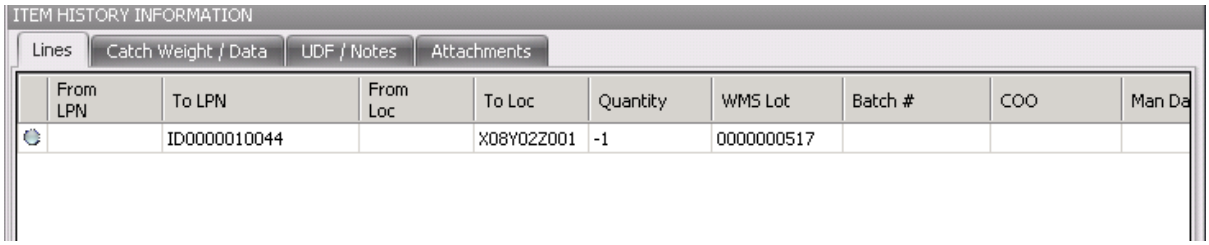
Transaction Header information displays in the tabs on the doc header left pane. Information is available on The Item selected, Item description, Facility, weight and volume and warehouse pack information. The selected Transaction detail is displayed from the WMS Transaction history record. This includes the WMS Key, the transaction type, the original sourcekey (if it came from a document) and the WMS internal source type and date.

Depending on the type of transaction selected, the appropriate header tabs will be populated with further information

Receipt will detail the Receipt information, Orders will show the Order header information, Adjust/Moves will show transaction level information as this is a transaction without a matching sourcekey and document.



Line Level information from the Item/Facility is displayed in the Lines tab on the right. All details from the WMS inventory transaction table are displayed highlighting the to and from ID/LPN, Loc, WMS Lot, quantity and the appropriate WMS lot attribute values (i.e. Batch #, COO, Manufacturing Date, Expiry Date etc)

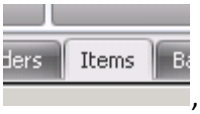


There are no edit or insert functions for History.

Adding or Editing Data in the Portals

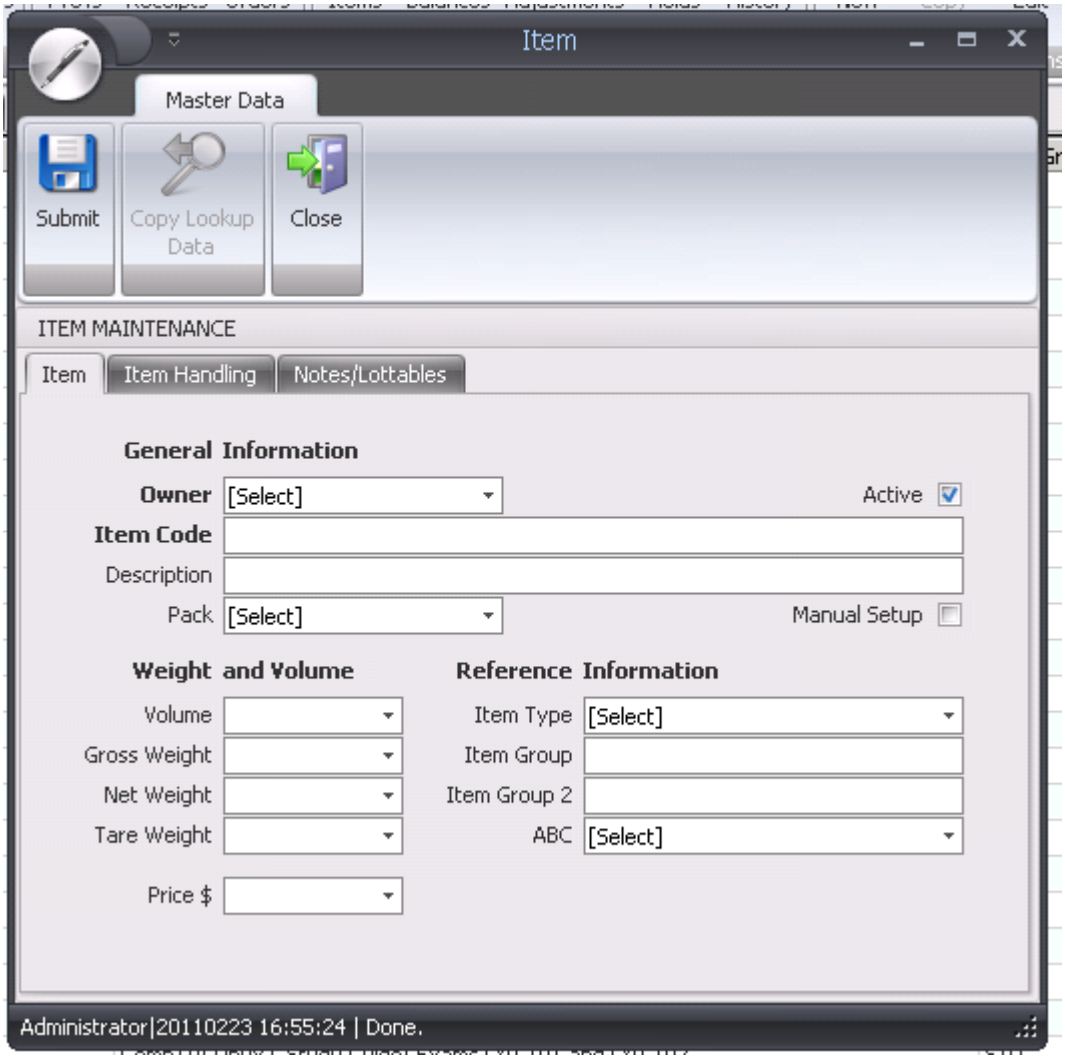
New Items

If you have security permission, you will have the 'New' button enabled on the Item tab.

To add a new Item Master, select the 'Items' tab 

, Click the 'New' button.

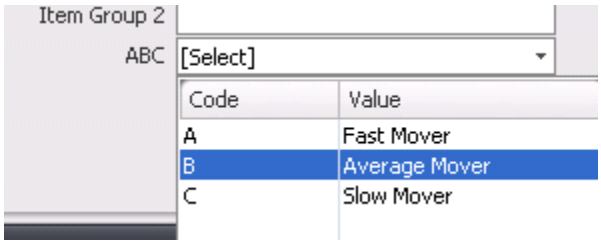
This will open up the new Item entry screen. This screen is configurable by user group, so your display may look different to the sample provided here. Enter the appropriate information into the entry screen.



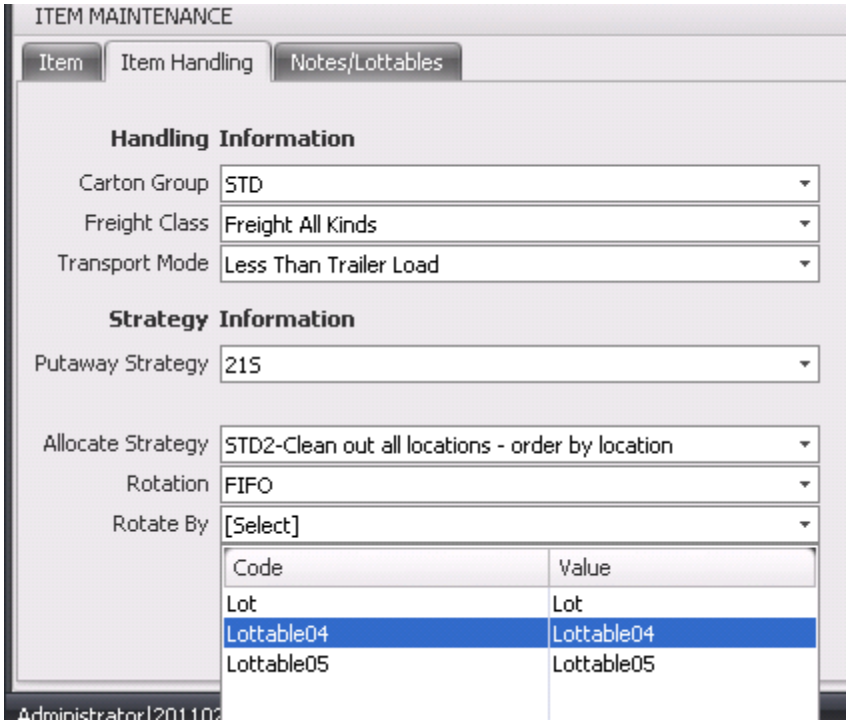
Text boxes will accept all text, drop down lists will be populated from the code lookup tables.

BOLD items are generally marked as mandatory items so must be filled in.

Drop down lists are restricted by your User group and will display what information your user group is restricted to. Select the appropriate choices from the lists.



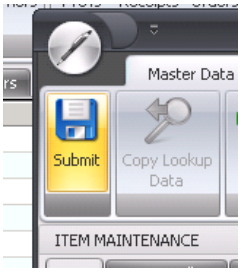
In general the 'Item' tab of the data entry is to be filled or entered by the Portal User. The "Item Handling' tab displays the WM9 strategies, rules and settings needed for the WMS. These values are automatically populated by the WMS when the record is created (populated from Owner default values), but can be entered by the portal user if you have suitable permission.



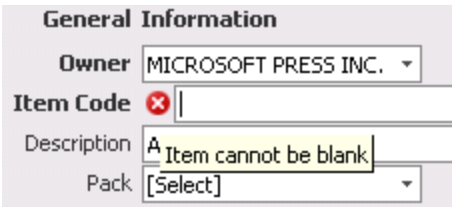
Currently removing or blanking existing data must be done by entering a dash '-' into the field you wish to block out. Sending an empty field through to the WMS will not erase the data, the WMS will treat this as a field not changed.

User defined fields and notes can also be entered.

When entry is complete, click the Submit button. Any Portals validation errors will be displayed.



The following shows a type of Portal validation error. The exact error and validation will be determined by the rules applied to the field you are entering in. In this example certain mandatory fields were not populated.



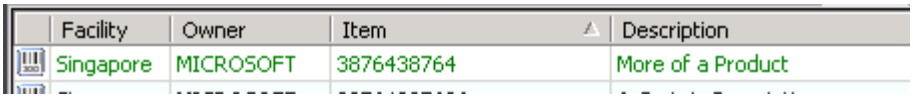
If successful, the entry should be reflected back in the list view.

Item Status

When submitting records to the WMS, they display as different colours depending on their status.

Black text is normal and represents valid data.

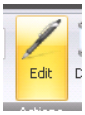
Green text indicates that the record is new in portals and has not been confirmed by the WMS as inserted correctly.

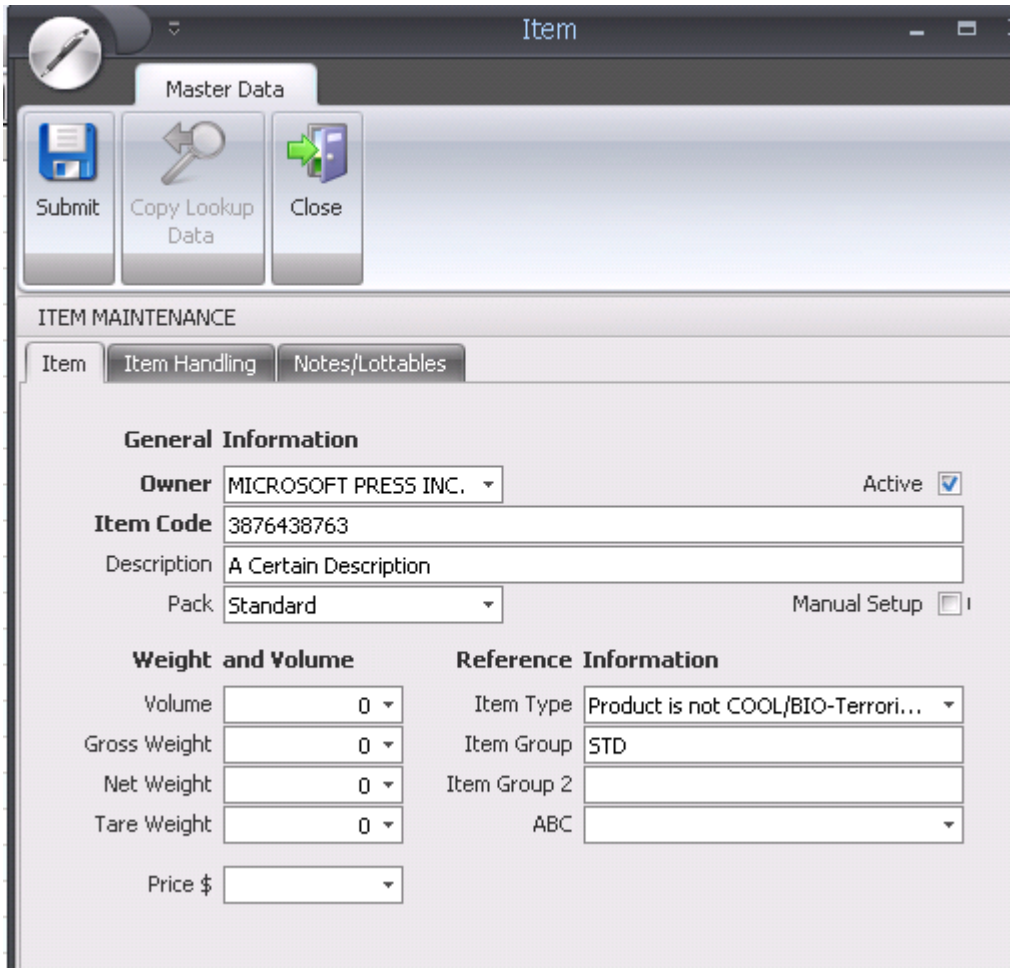


Red indicates that an insert or update error occurred. Users can open the record using the 'Edit' button and make any changes necessary and submit again. If it remains red, then an Administrator is needed to examine the logs and rectify this issue.

Edit Item

To edit an existing item, select it from the list view and use the Edit button to open the existing record in the data entry window. The values that are applied from the WMS are reflected back in the edit window. Changes can be made from the pop-up, then click Submit to update the appropriate WMS.



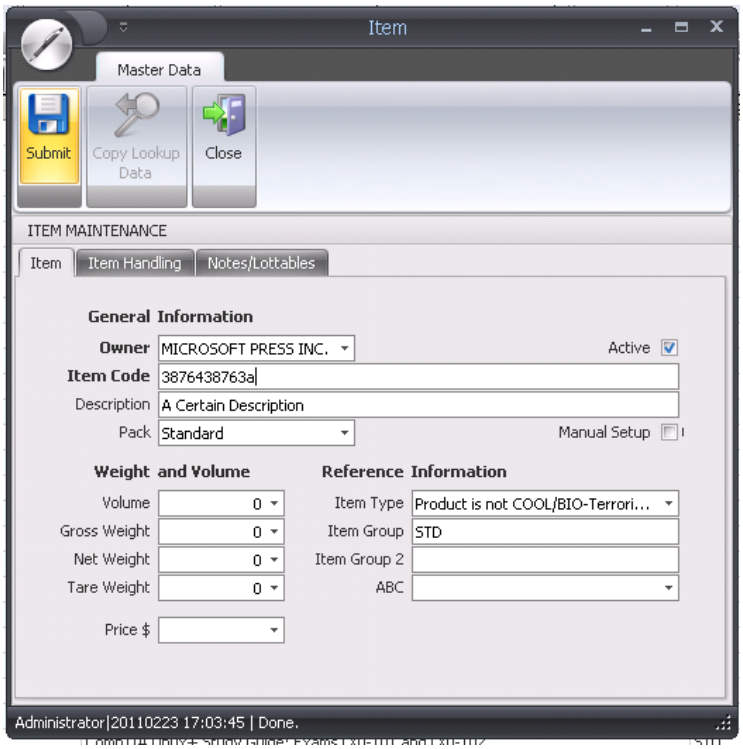


Any Portals validation errors will be displayed.

If successful, the updated entry should be reflected back in the list view.

Copy Item via Edit button

To Copy an item, the edit windows can be used as above. Return the existing record, and make a change to the primary keys (i.e. Owner or Item Code) and submit the item again. It will create a new record in the WMS with those keys and values.



Facility	Owner	Item	Description	Item Group
Singapore	MICROSOFT	3876438763	A Certain Description	STD
Singapore	MICROSOFT	3876438763A	A Certain Description	STD
Singapore	MICROSOFT	B003GZEFCK	Microsoft Windows 2000 Professional Resource Kit,2000 public	STD

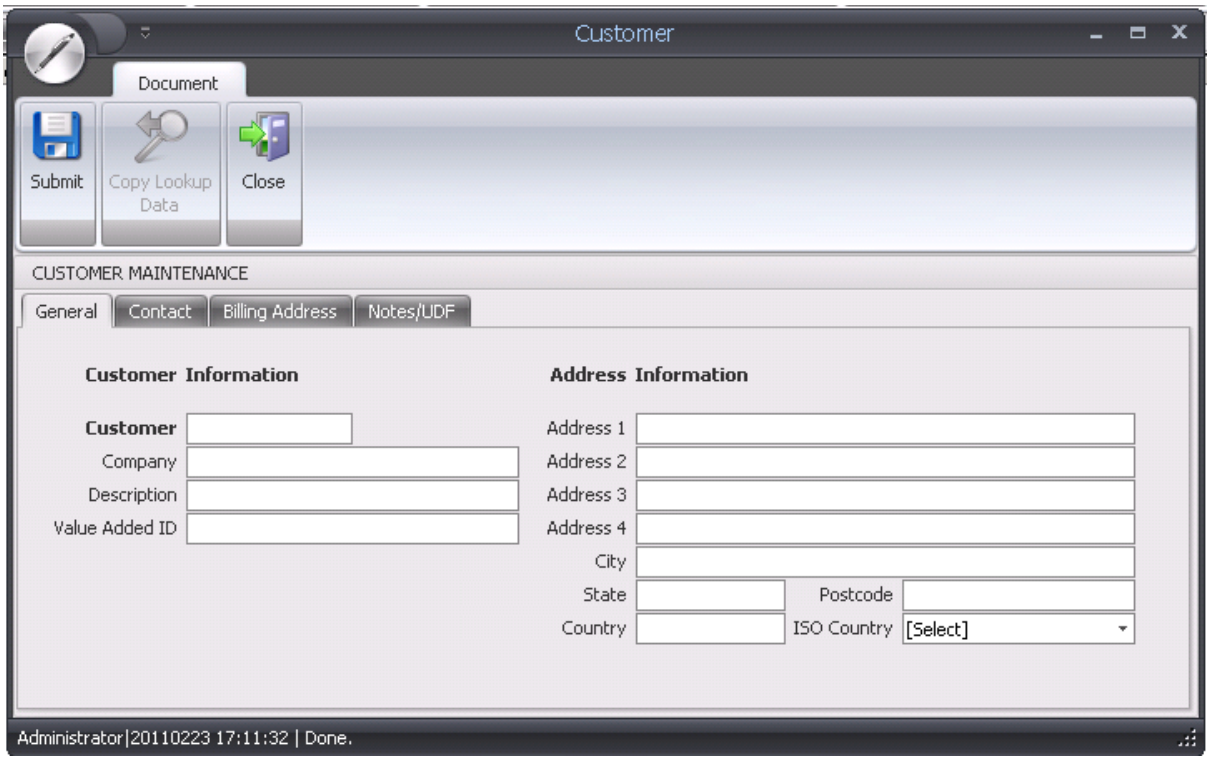
New Trading Partner

If you have security permission, you will have the 'New' button enabled on the for the appropriate Trading Partners tabs. The example below follow a Customer entry and edit, but the same process and logic applies for Suppliers and Carriers also.

To add a new Customer, select the 'Customers' tab

, Click the 'New' button.

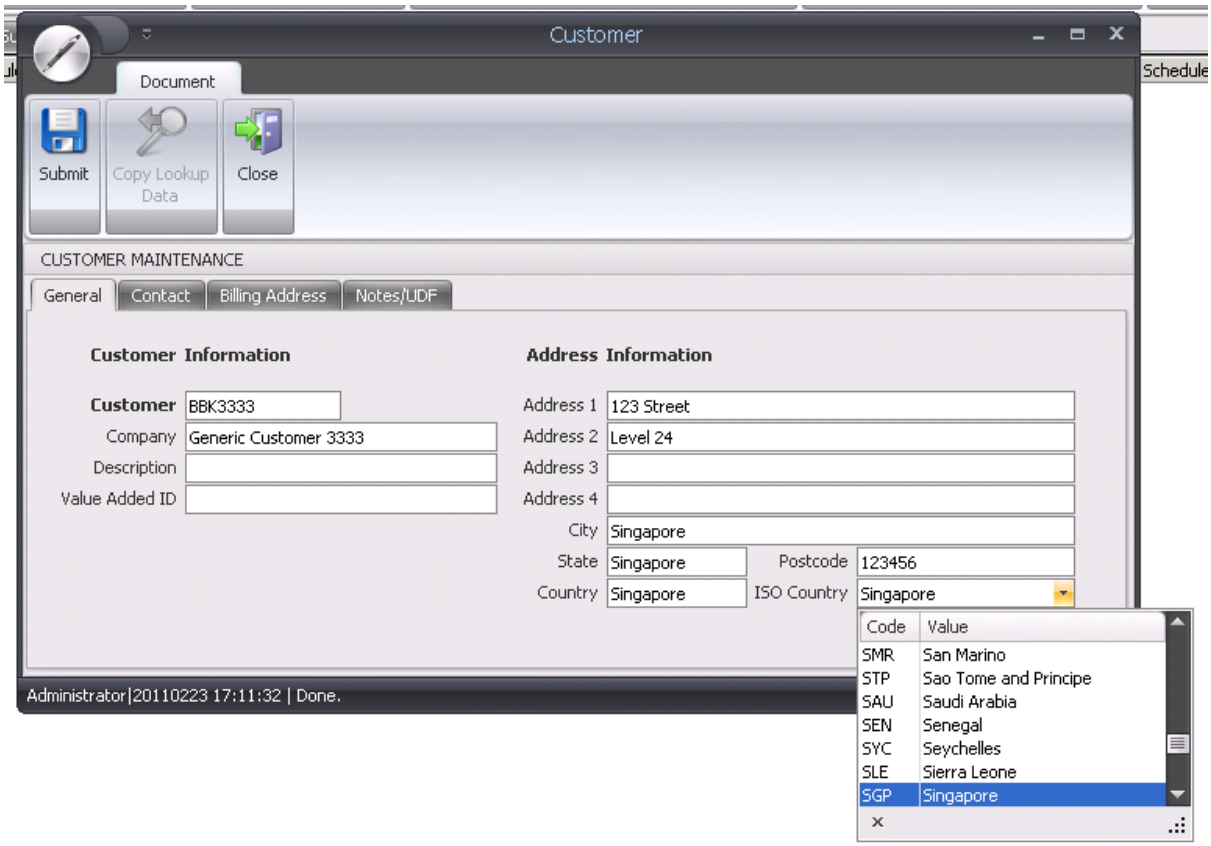
This will open up the new Customer entry screen. This screen is configurable by user group, so your display may look different to the sample provided here. Enter the appropriate information into the entry screen.



Text boxes will accept all text, drop down lists will be populated from the code lookup tables.

BOLD items are generally marked as mandatory items so must be filled in.

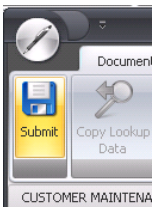
Drop down lists are restricted by your User group and will display what information your user group is restricted to. Select the appropriate choices from the lists.



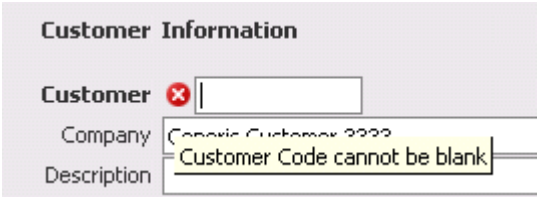
Currently removing or blanking existing data must be done by entering a dash '-' into the field you wish to block out. Sending an empty field through to the WMS will not erase the data, the WMS will treat this as a field not changed.

Contact Information, Billing Address and user defined fields and notes can also be entered.

When entry is complete, click the Submit button. Any Portals validation errors will be displayed.



The following shows a type of Portal validation error. The exact error and validation will be determined by the rules applied to the field you are entering in. In this example certain mandatory fields were not populated.



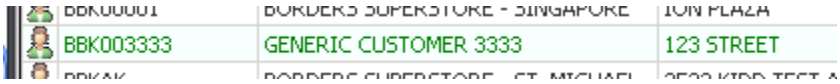
If successful, the entry should be reflected back in the list view.

Trading Partner Status

When submitting records to the WMS, they display as different colours depending on their status.

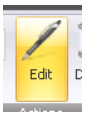
Black text is normal and represents valid data.

Green text indicates that the record is new in portals and has not been confirmed by the WMS as inserted correctly.

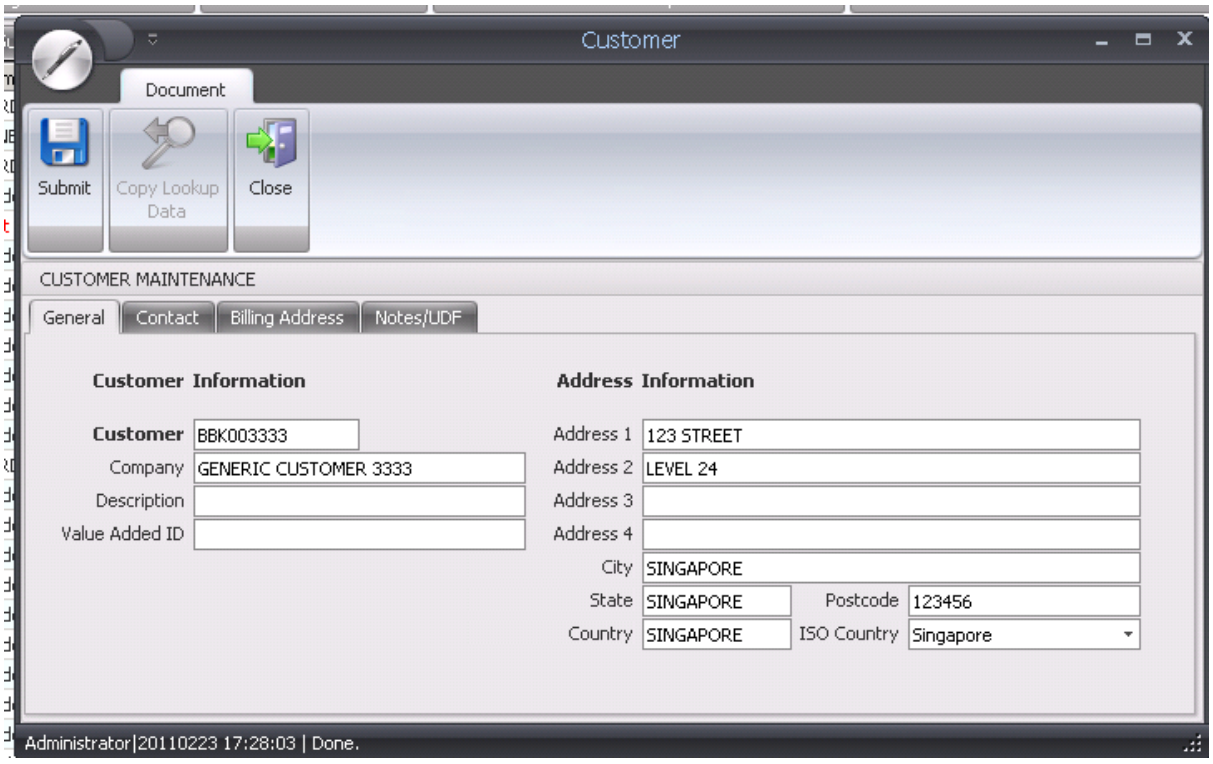


Red indicates that an insert or update error occurred. Users can open the record using the 'Edit' button and make any changes necessary and submit again. If it remains red, then an Administrator is needed to examine the logs and rectify this issue.

Edit Trading Partner



To edit an existing Trading Partner, select it from the list view and use the Edit button to open the existing record in the data entry window. The values that are applied from the WMS are reflected back in the edit window. Changes can be made from the pop-up, then click Submit to update the appropriate WMS.



Any Portals validation errors will be displayed.

If successful, the updated entry should be reflected back in the list view.

Copy Trading Partner via Edit button

To Copy a Trading Partner, the edit windows can be used as above. Return the existing record, and make a change to the primary key (i.e. Customer) and submit the Trading Partner again. It will create a new record in the WMS with those keys and values.

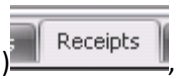
New Documents

If you have security permission, you will have the 'New' button enabled on each appropriate document tab.

All documents are handled though the same methods and steps. The following shows a Receipt entry/edit, but the same steps and process can be followed for Purchase Orders and Shipment Orders.

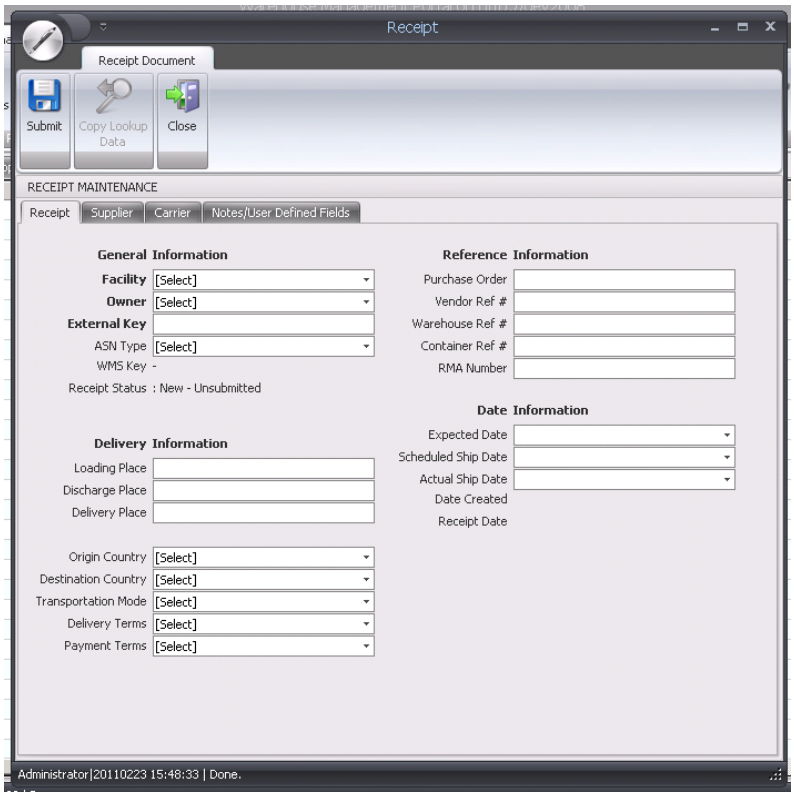
Portals handles documents and document details separately. To create a new document, you need to create a Header record first. After creating a header record the document view will open where detail lines items can be added.

To only add detail lines or edit existing line items, this can be done directly from the Document view (Select the Record from the list view and lick the 'View' button)

To add a new document, select the appropriate tab (i.e. Receipts) 

, Click the 'New' button.

This will open up the new document entry screen. This screen is configurable by user group, so your display may look different to the sample provided here. Enter the appropriate information into the entry screen.

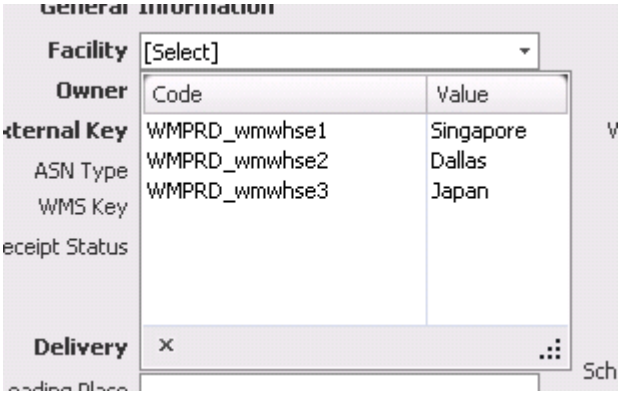


Text boxes will accept all text, drop down lists will be populated from the code lookup tables, date formats and date helpers will allow for easy entry of dates, and list views will allow lookups and searches of data.

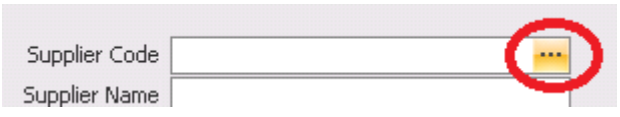
BOLD items are generally marked as mandatory items so must be filled in.

Dates will be formatted in the local user date settings, and will display local time. (This date/time will be converted to UTC datetime when inserting into the WMS). Dates can be enter manually, or using the date calendar.

Drop down lists are restricted by your User group and will display what information your user group is restricted to. Select the appropriate choices from the lists.

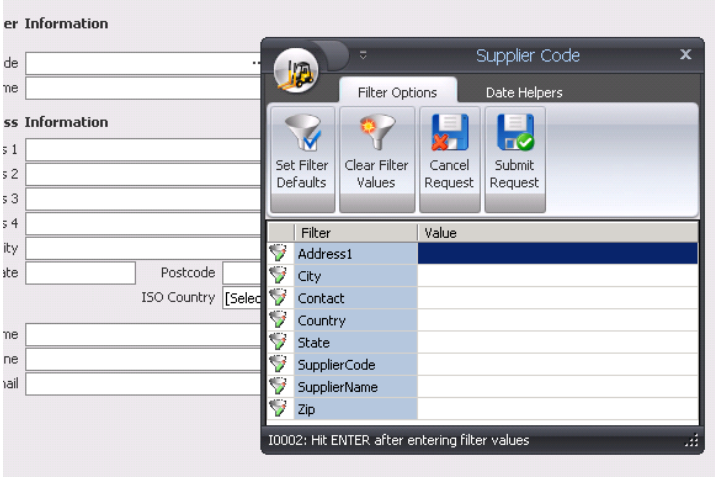


Lookup fields are indicated by the three dots in an edit field.

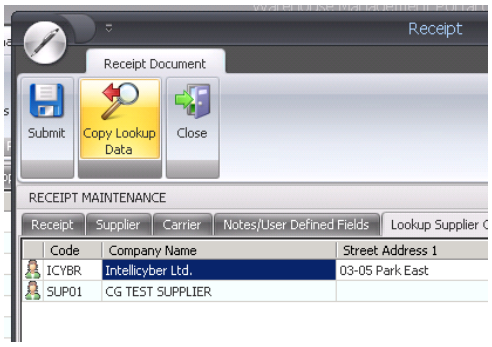


By clicking these dots, Portals will open a filter window to search for matching records.

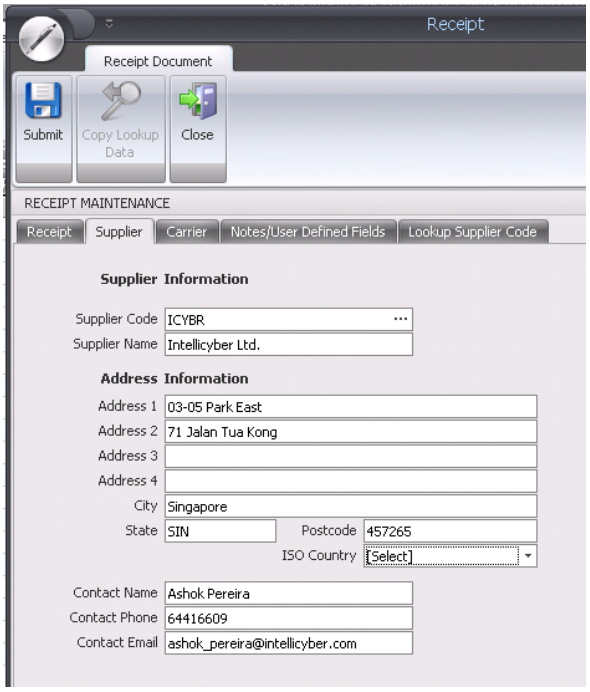
Enter any filters in then select the 'Submit Request' button.



Portals will return a list of matching records. Select the record you wish to populate back in to the edit form, and click the 'Copy Lookup Data' button. To rerun the lookup, click close and go back to the edit field you were looking up, and click the three dots again.

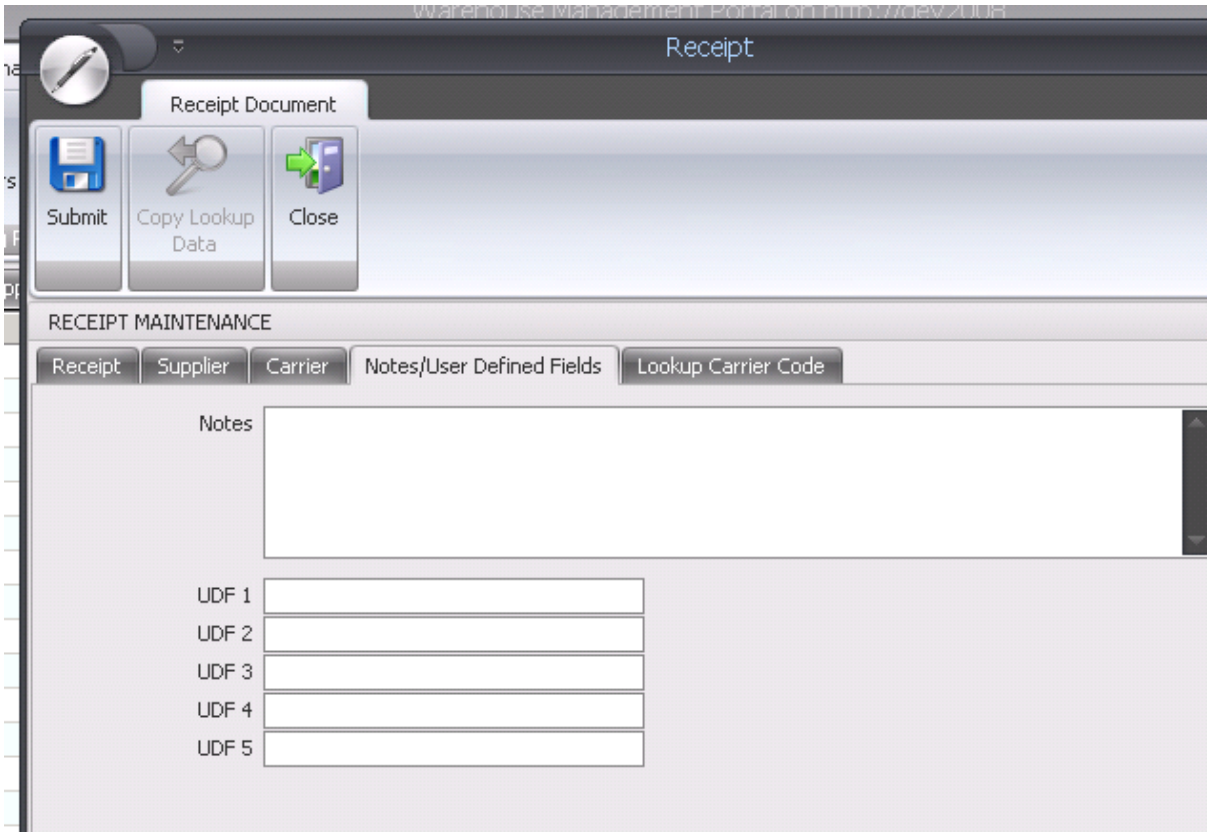


In this receipt example, you can also look up carrier details as well. For any field whether it has been returned from a lookup or entered previously, you can modify, amend or add as needed.

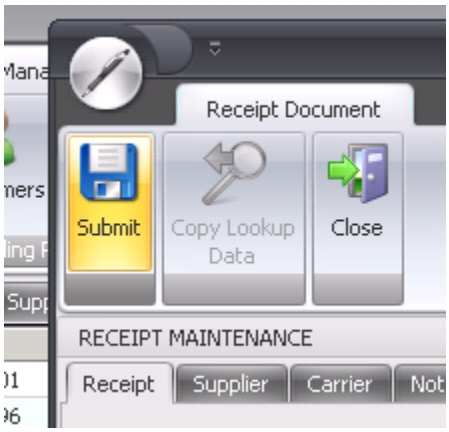


Currently removing or blanking existing data must be done by entering a dash '-' into the field you wish to block out. Sending an empty field through to the WMS will not erase the data, the WMS will treat this as a field not changed.

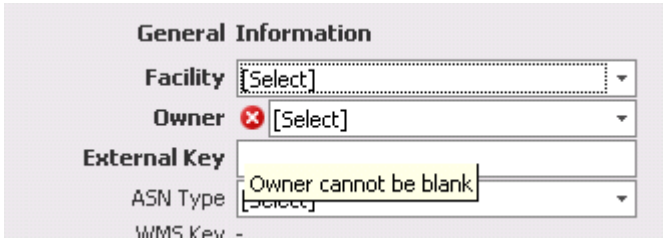
User defined fields and notes can also be entered.



When entry is complete, click the Submit button. Any Portals validation errors will be displayed.



The following shows a type of Portal validation error. The exact error and validation will be determined by the rules applied to the field you are entering in. In this example certain mandatory fields were not populated.



Once submitted, the Document View will open for allowing Detail lines editing and adding (see section below).

Note: The WMS generated keys are created after the original submission so they may not initially show in the document view until it has been refreshed and opened again.

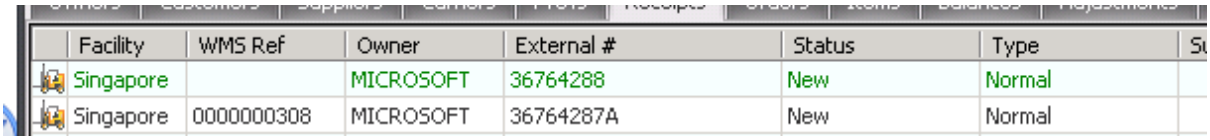
If successful, the entry should be reflected back in the list view. The List view is not automatically refreshed, so you will need to list the documents again to see it on the view.

Document Status

When submitting records to the WMS, they display as different colours depending on their status.

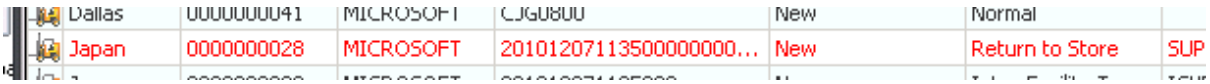
Black text is normal and represents valid data.

Green text indicates that the record is new in portals and has not been confirmed by the WMS as inserted correctly.



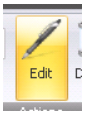
Facility	WMS Ref	Owner	External #	Status	Type
Singapore		MICROSOFT	36764288	New	Normal
Singapore	0000000308	MICROSOFT	36764287A	New	Normal

Red indicates that an insert or update error occurred. Users can open the record using the 'Edit' button and make any changes necessary and submit the document again. If it remains red, then an Administrator is needed to examine the logs and rectify this issue.

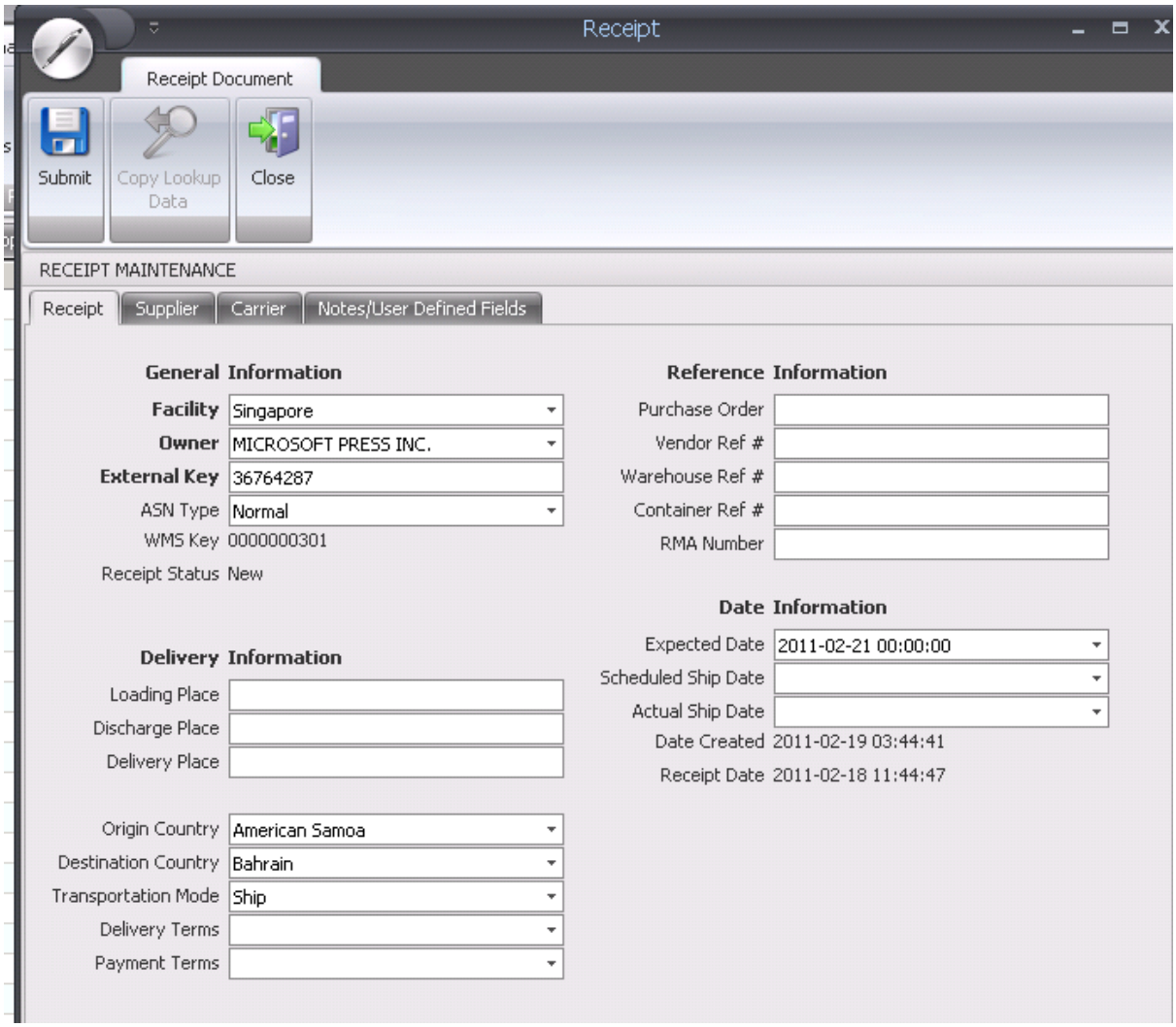


Dallas	0000000041	MICROSOFT	CJGU8UU	New	Normal
Japan	0000000028	MICROSOFT	20101207113500000000...	New	Return to Store

Edit Document Header



Edit button will open the existing record in the data entry window. The values that are applied from the WMS are reflected back in the edit window. Changes can be made from the pop-up, then click Submit to update the appropriate WMS.



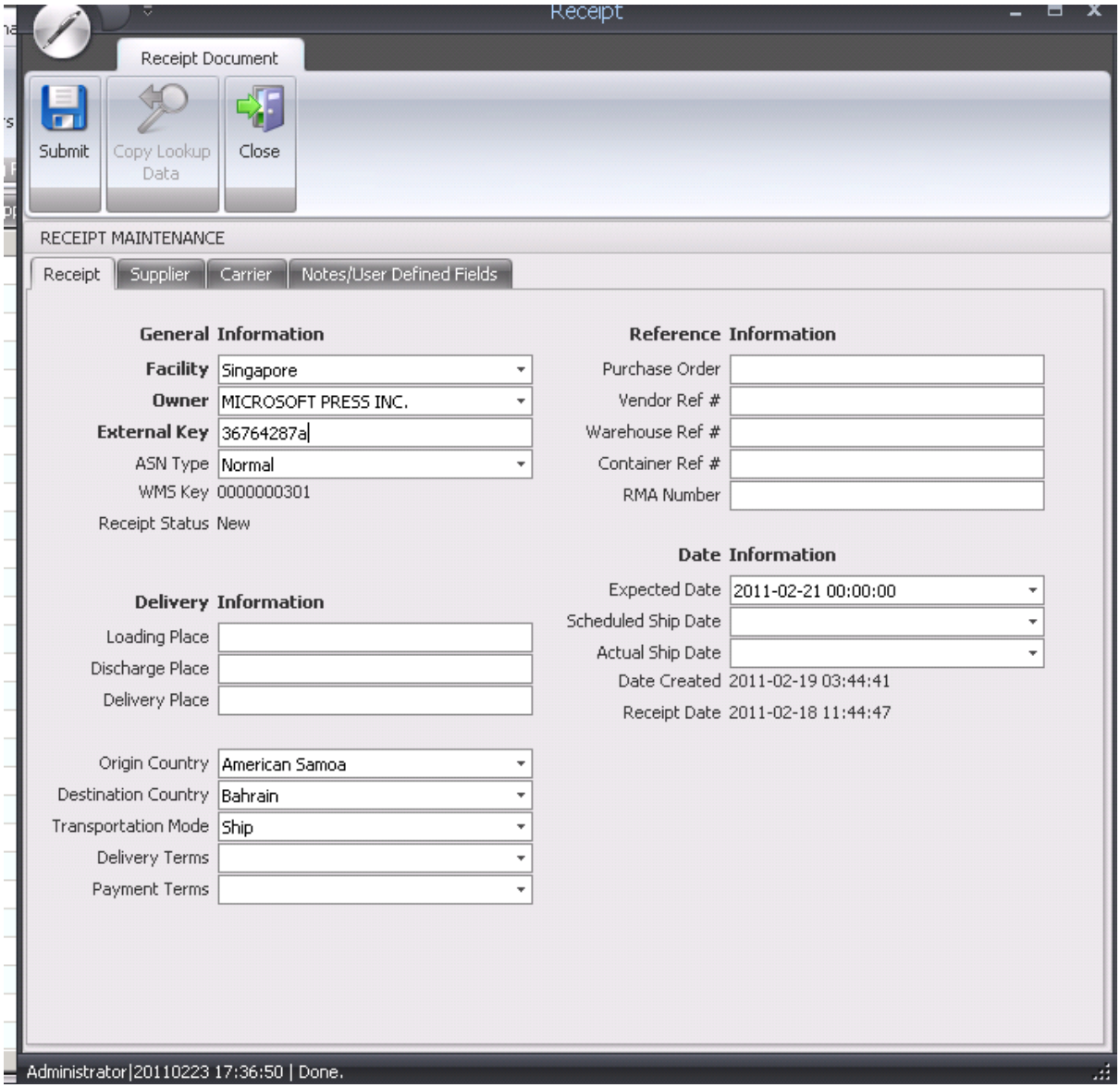
Default values that are applied by the WMS will be reflected in the edit window. These values can be changed by the portal user then submitted back to the WMS.

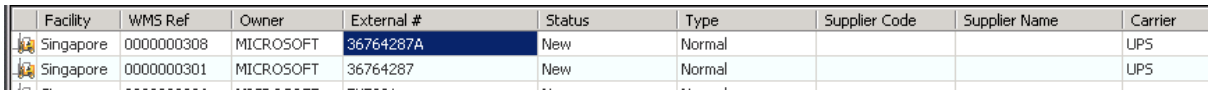
When attempting to submit, any Portals validation errors will be displayed.

If successful, the updated entry should be reflected back in the list view.

Copy Document via Edit button

To Copy a document, the edit windows can be used as above. Return the existing record, and make a change to the primary keys (i.e. Facility, Owner or External Key) and submit the document again. It will create a new record in the WMS with those keys and values.





Facility	WMS Ref	Owner	External #	Status	Type	Supplier Code	Supplier Name	Carrier
Singapore	0000000308	MICROSOFT	36764287A	New	Normal			UPS
Singapore	0000000301	MICROSOFT	36764287	New	Normal			UPS

NOTE: the Document window that immediately pops up for the line edit is the ORIGINAL document, not the new document. Please refresh the list view and open the new copied document to add line items.

NOTE2: The document created above has only copied the header record. Line items still need to be created through the document view.

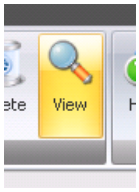
Delete Document

Clicking the Delete button, the selected record will be deleted from the Portals and the WMS. Any errors deleting the document from the WMS, will display the document record with a red strikethrough test.

These will require manual deleting from the WMS, and the document to be flagged deleted in the portals database by an administrator.

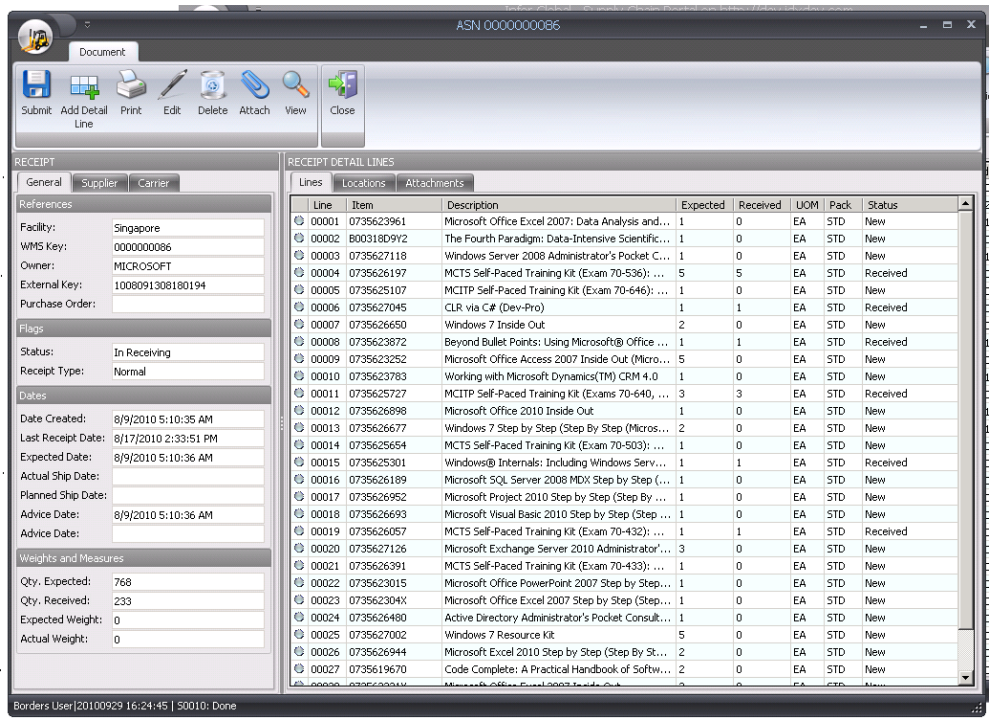
Document View

Once a List view has been returned, users will select an appropriate record and then click 'VIEW' to open that record in a new window.



The Document view in most cases will also trigger after editing / creating a new Document header record.

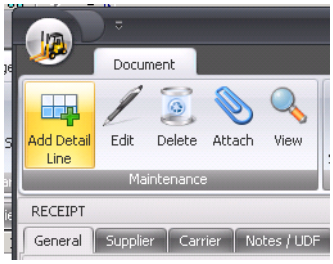
The Window will open and display the Document Header portion in the left pane and the line tabs in the right. These values are configured by the Administrators on the Portal Server, and are appropriate to your user group.



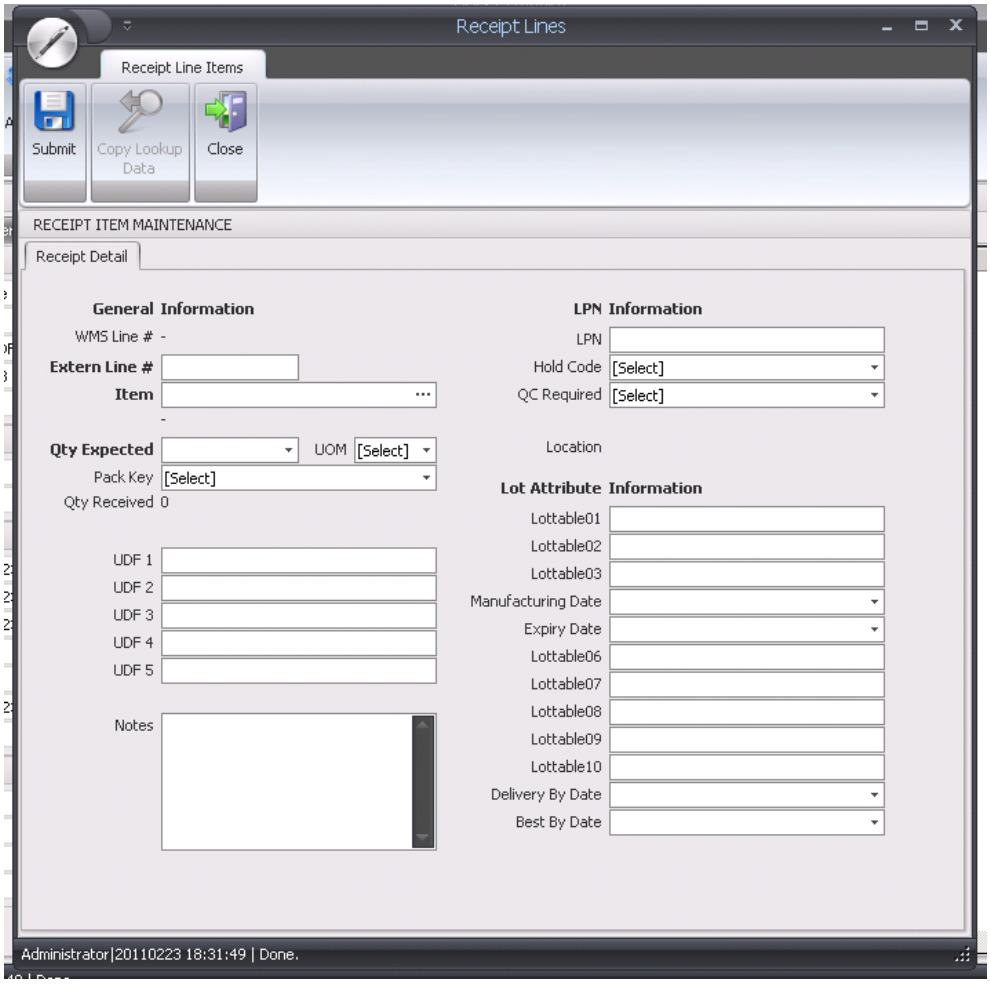
Data is now available to be browsed appropriate to the document or inventory chosen, and your user group requirements.

Document Add Detail Line

To add new line items to the Document, click the 'Add Detail Line' button.



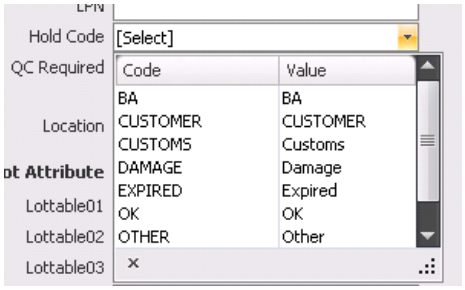
The Line Item edit window will appear. This screen is configurable by user group, so your display may look different to the sample provided here. Enter the appropriate information into the entry screen.



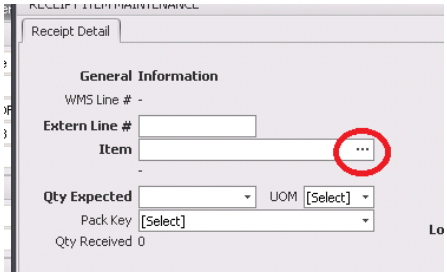
Text boxes will accept all text, drop down lists will be populated from the code lookup tables, date formats and date helpers will allow for easy entry of dates, and list views will allow lookups and searches of data.

BOLD items are generally marked as mandatory items so must be filled in.

Drop down lists are restricted by your User group and will display what information your user group is restricted to. Select the appropriate choices from the lists.

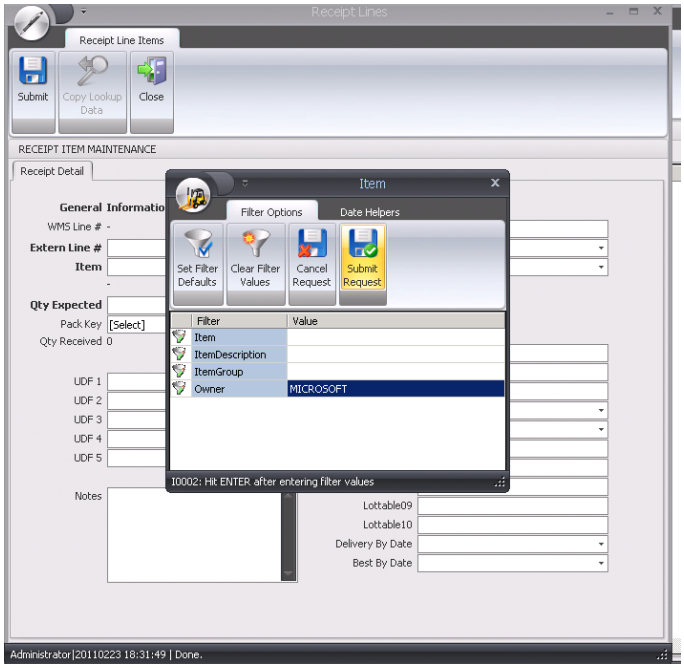


Lookup fields are indicated by the three dots in an edit field.

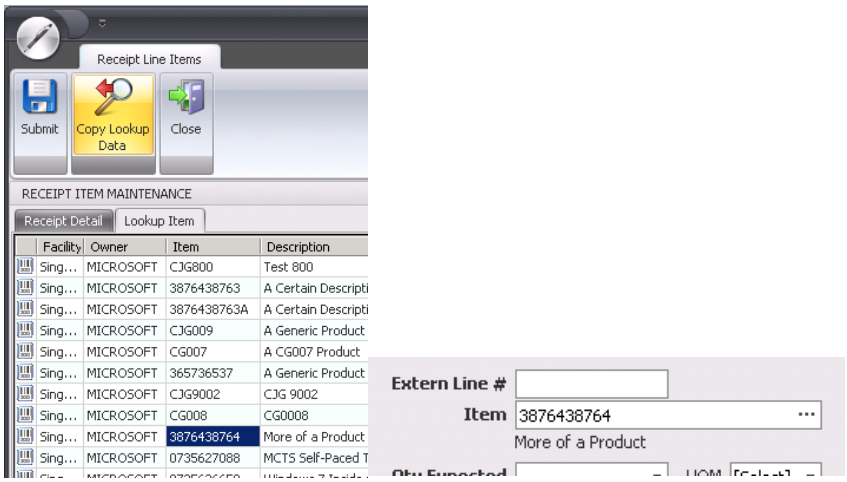


By clicking these dots, Portals will open a filter window to search for matching records.

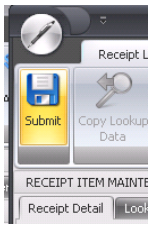
Enter any filters in then select the 'Submit Request' button.



Portals will return a list of matching records. Select the record you wish to populate back in to the edit form, and click the 'Copy Lookup Data' button. To rerun the lookup, click close and go back to the edit field you were looking up, and click the three dots again.

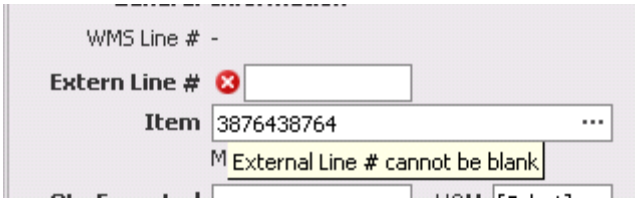


Currently removing or blanking existing data must be done by entering a dash '-' into the field you wish to block out. Sending an empty field through to the WMS will not erase the data, the WMS will treat this as a field not changed.

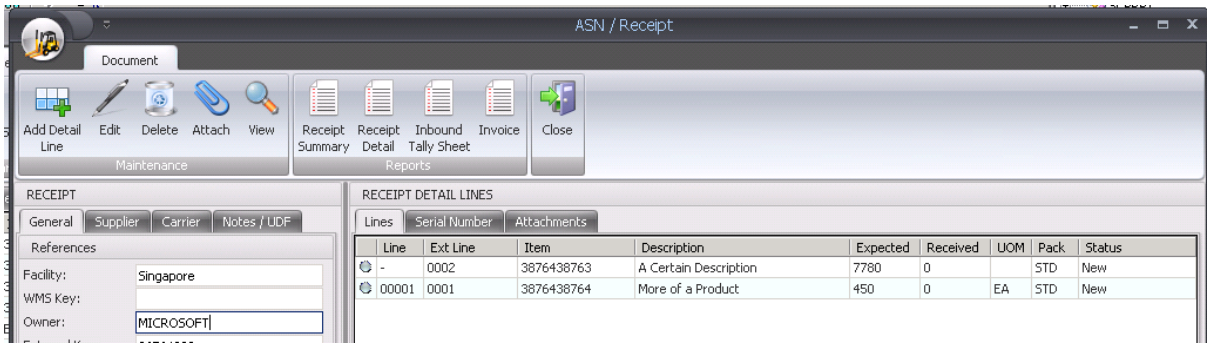


When entry is complete, click the Submit button. Any Portals validation errors will be displayed.

The following shows a type of Portal validation error. The exact error and validation will be determined by the rules applied to the field you are entering in. In this example certain mandatory fields were not populated.



Note: The WMS generated line keys are created after the original submission so they may not initially show in the document view until it has been refreshed and opened again, or the next line is added. In the below screenshot, a second line was added. The detail line view was refreshed after submission, so the first line now displays the WMS generated line #.



If successful, the entry should be reflected back in the list view. The List view is not automatically refreshed, so you will need to list the documents again to see it on the view.

Document Line Status

When submitting records to the WMS, they display as different colours depending on their status.

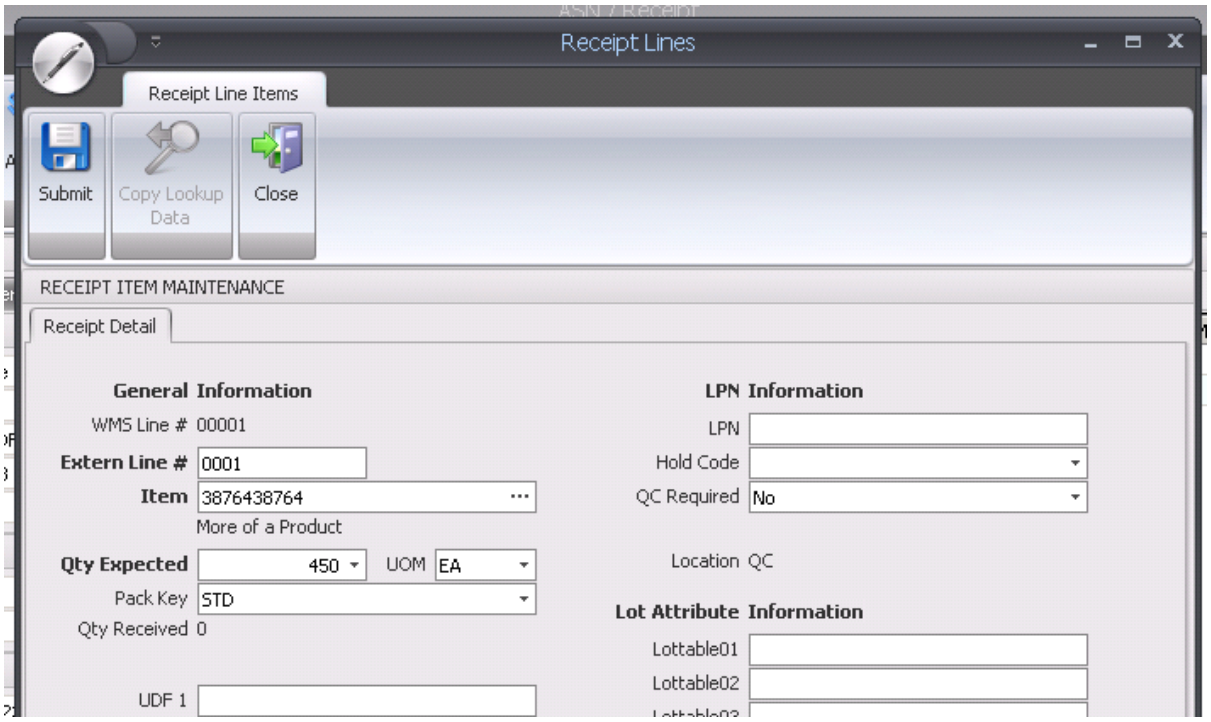
Black text is normal and represents valid data.

Green text indicates that the record is new in portals and has not been confirmed by the WMS as inserted correctly.

Red indicates that an insert or update error occurred. Users can open the record using the 'Edit' button and make any changes necessary and submit the document again. If it remains red, then an Administrator is needed to examine the logs and rectify this issue.

Edit Document Detail Line

Edit button will open the existing line item in the data entry window. The values that are applied from the WMS are reflected back in the edit window. Changes can be made from the pop-up, then click Submit to update the appropriate WMS.



Default values that are applied by the WMS will be reflected in the edit window. These values can be changed by the portal user then submitted back to the WMS.

When attempting to submit, any Portals validation errors will be displayed.

If successful, the updated entry should be reflected back in the list view.

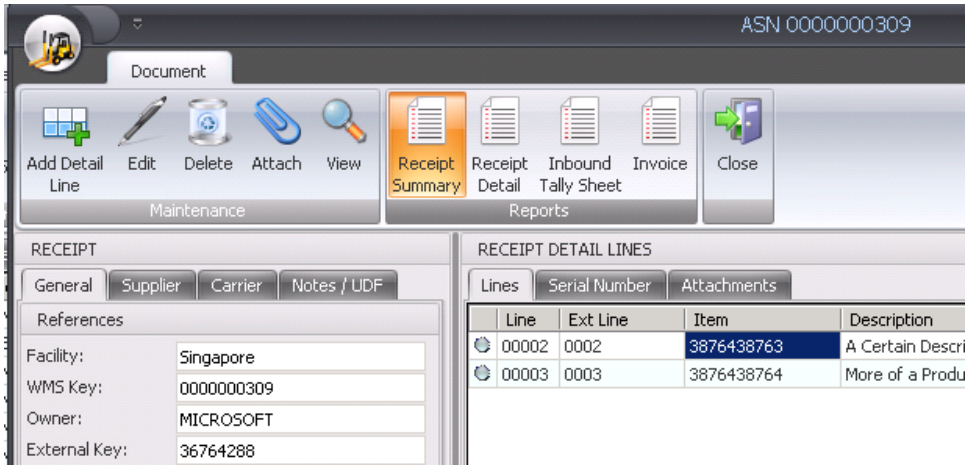
Copy Document Detail Line via Edit button

The ability to copy a document line using the edit function SHOULD NOT BE EXECUTED. This will modify the existing line in the portal database while creating a new line in the WMS. Synchronization will be needed to update this data between the systems.

Printing Reports

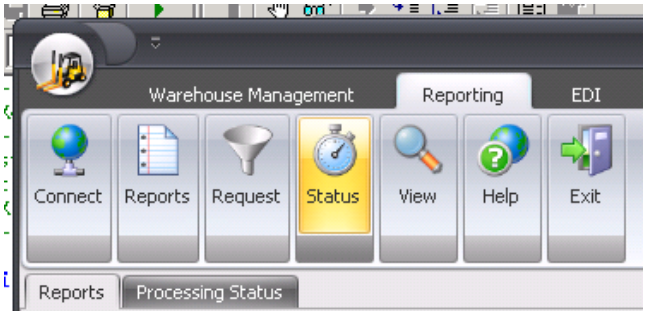
Each document view and inventory screen can have reports associated with it. Depending on your permissions the reports will be restricted to only your specified reports.

Select the document and report you wish from this screen (for example below is selecting the Receipt Summary Report to run).

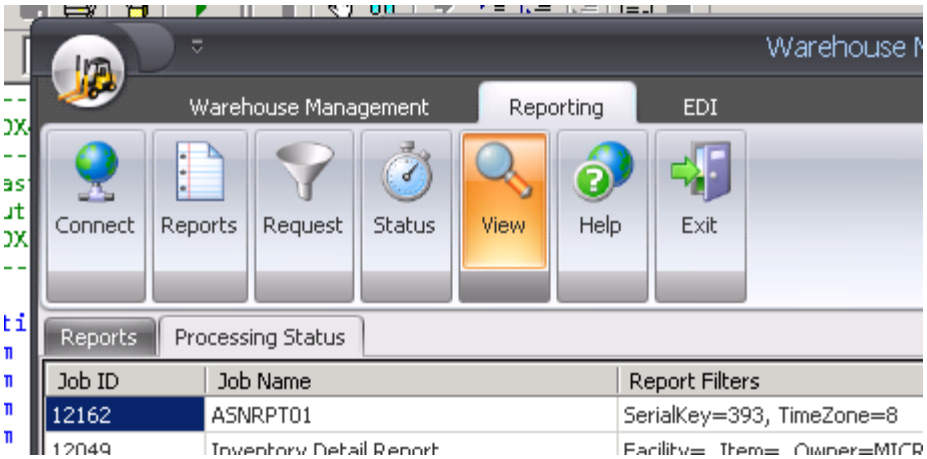


The status bar at the bottom will display the job number assigned to this report request.

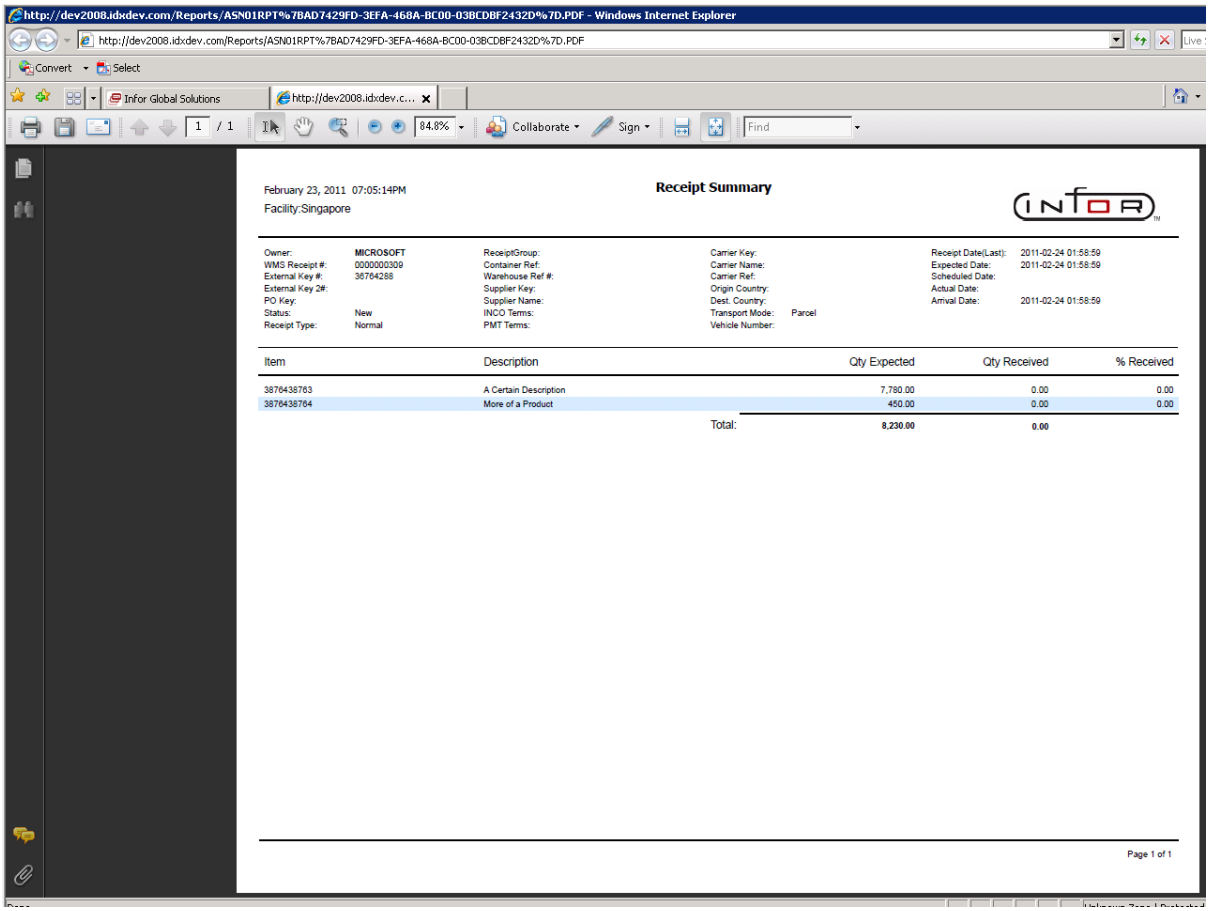
To view the report, click the reports tab, and then the Status button.



The Job ID and Job name will be displayed. Select the matching job id and click the View button.



This will launch the viewer for the document. Depending on the type, this may open Excel, or browser or pdf, etc.

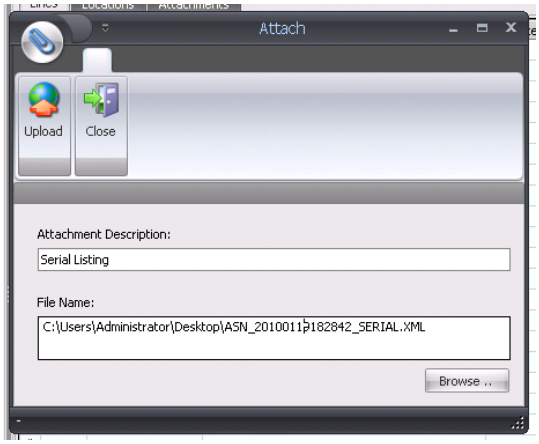


Reports can also be printed directly from the Reports tab (see reports section below)

Attaching Documents

Documents from a user's local machine may be uploaded to the Portal server attached to master data setup or documents.

Choose the master data or document view you wish to attach the document, and then click the 'Attach' button.

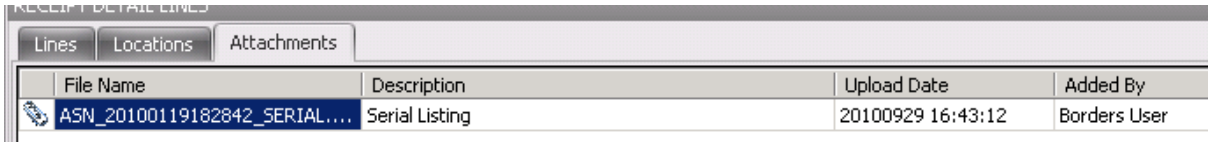


The Attach pop up will be displayed.

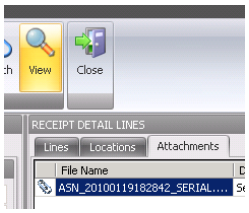
Click the 'Browse' button and navigate the window to the document you wish to attach. The Filename should be unique as all documents are loaded in the same directory on the Portal server.

Enter a description in the field, and then click the Upload button. This will upload the document to the Portal Server. The status bar will reflect the transmission process as its being uploaded.

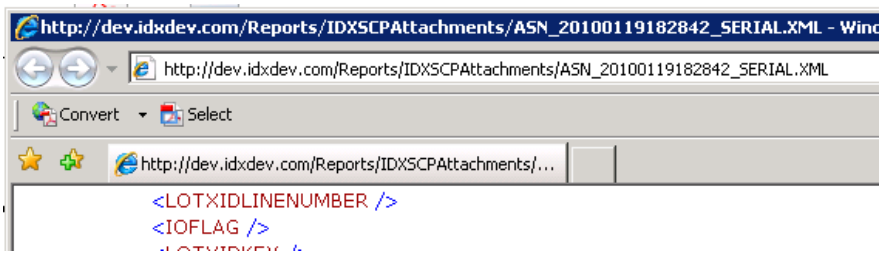
The Document will then be displayed in the Attachment tab on the documents.



To view, select the attachment, then click the 'VIEW" button form the document ribbon.



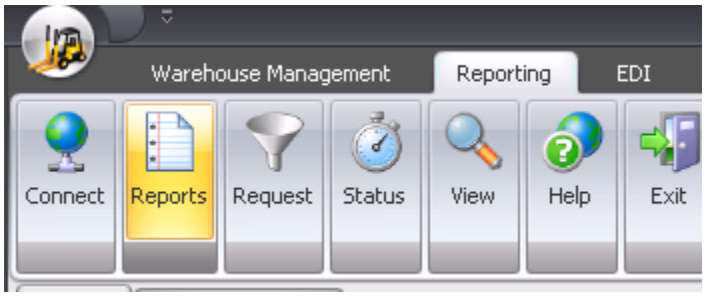
It will open the document in the appropriate viewer on your local machine.



Reports

Each Portal user has the ability to access 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.

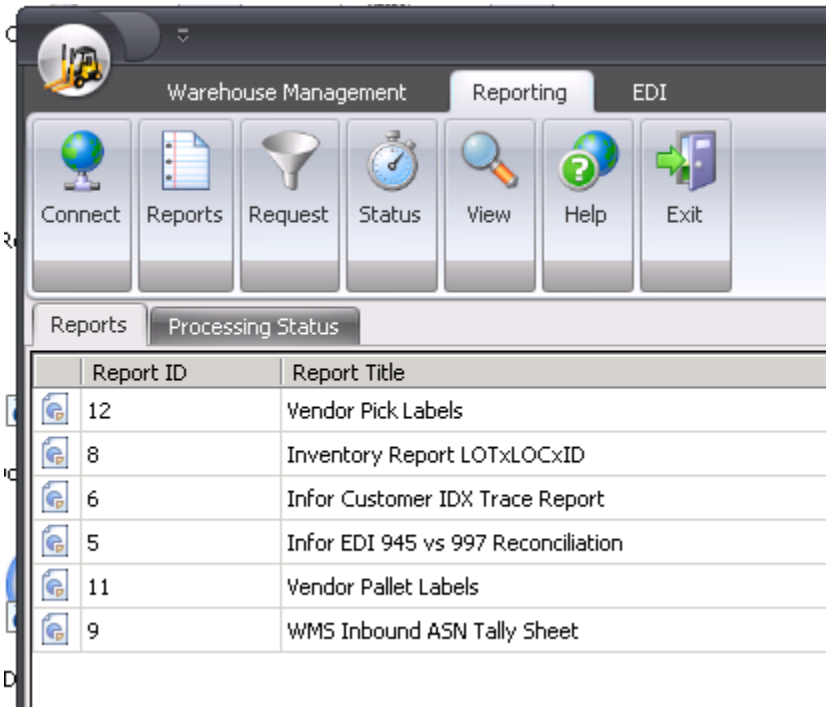
Click the Reports button in the menu ribbon bar.



Setting up of this security is described in the Administration document.

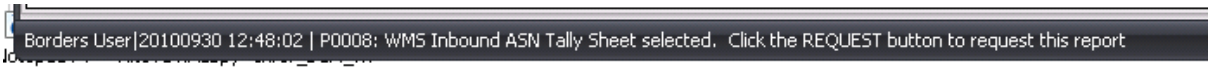
The status bar at the bottom of the screen will summarize the number of reports available, and the report names themselves will appear in the Reports Tab.

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.

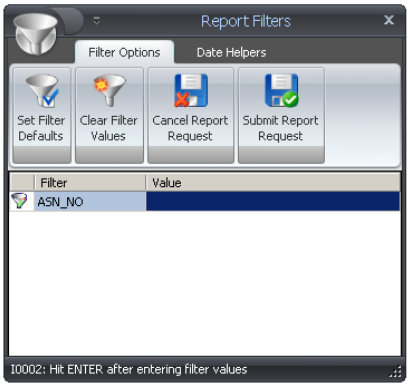


Select the Request button from the menu ribbon to begin the process.

The Report Filters menu will appear.

Report Filters

The same filter process are used as with the Warehouse Management section.

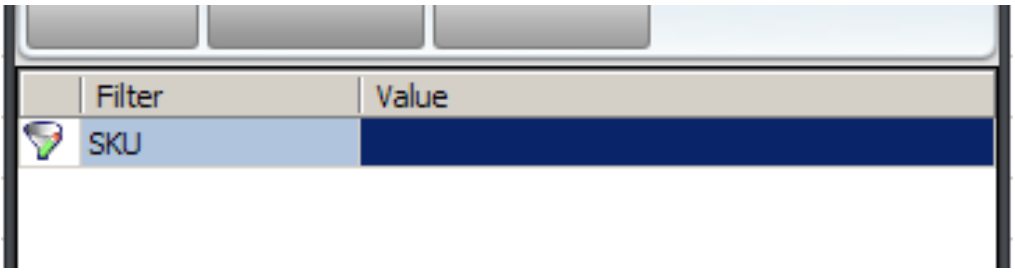


If the report has any values that must be passed in the report, these will appear as filter items in a list. If the report does not require any filter values the list will be empty.

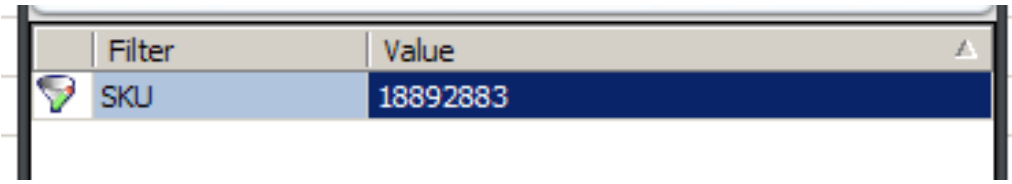
Report filters are used to add parameters to a report, and are created when the report itself is designed. Examples of filters may be dates, document numbers, customer details, etc.

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.

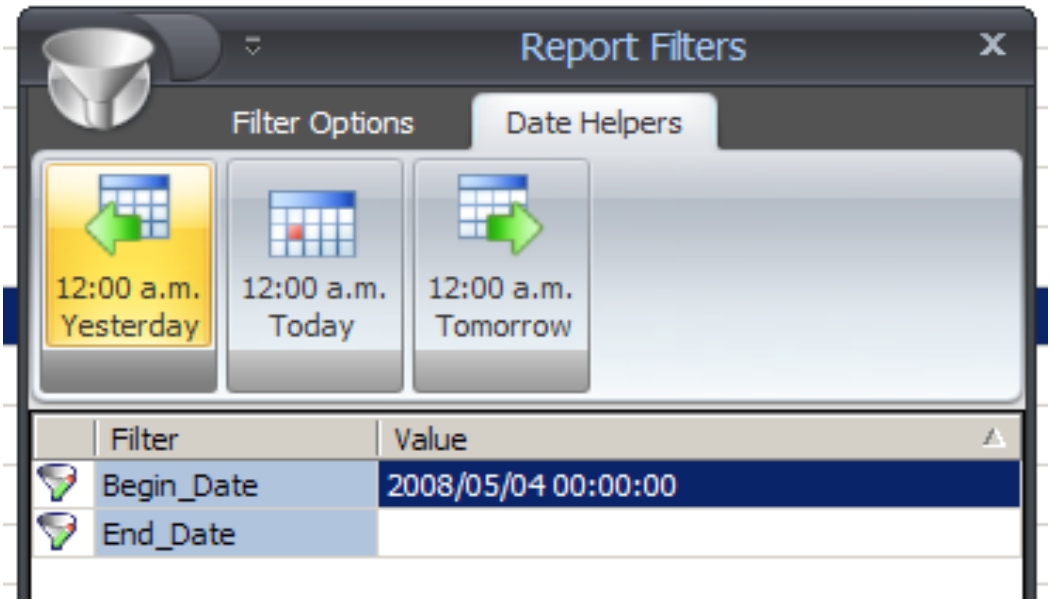


Set Filter Values

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 Portal.

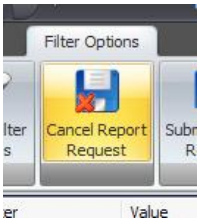
Click back on the Filter options tab to continue the "Submit Report Request"

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

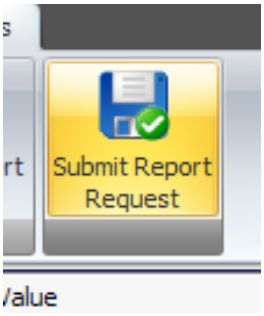
If you do not wish to run this report, select the cancel Report Request, or the 'X' in the top right hand corner.



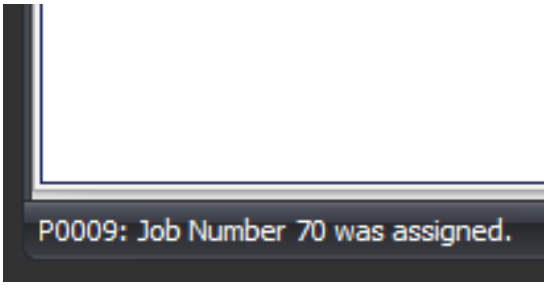
This will return you to the Reports Tab.

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.

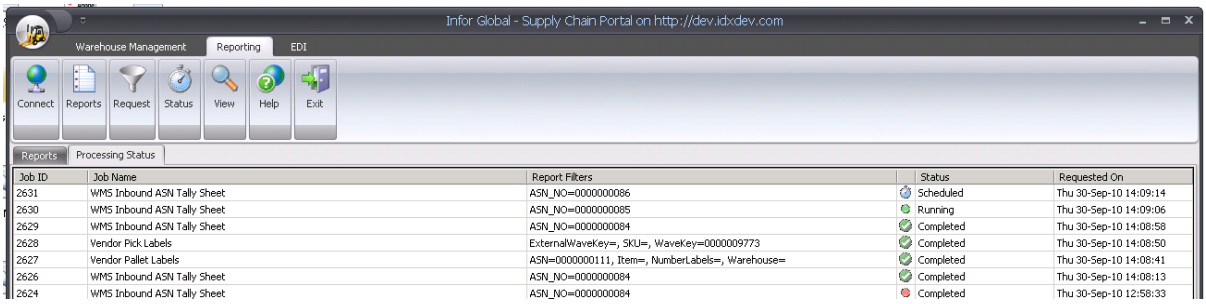
The nature of IDX Reports

IDX reports will be available to view from the Portal 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.

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

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

If the report running has an error or some other problem

(usually filter values do not match data in the source database)

the Status icon will display a red dot.

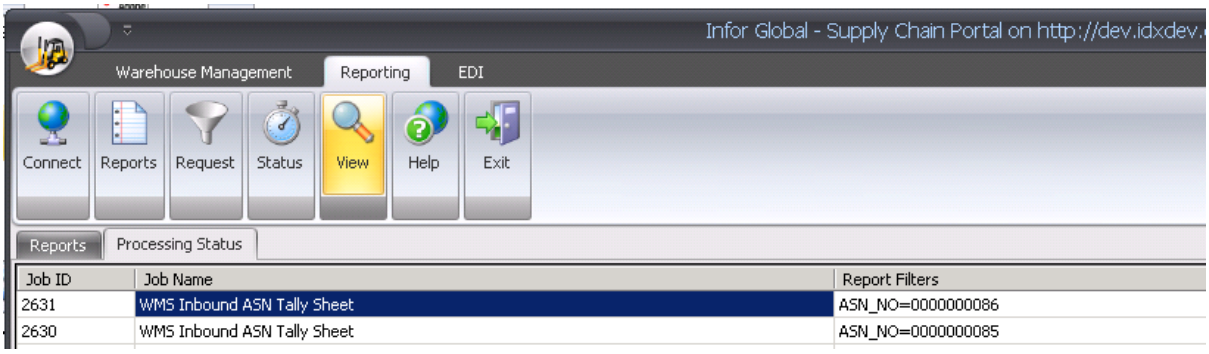
As displayed the Report Filters column shows the data entered in the filter popup when requesting the report.

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

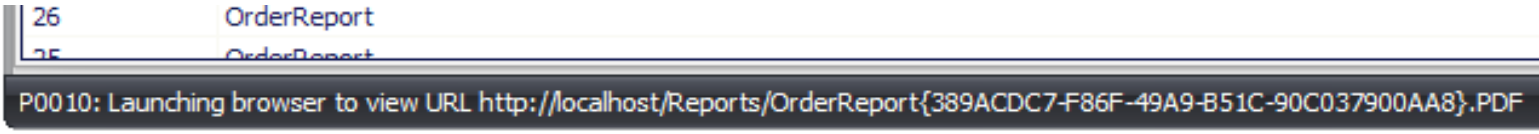
Viewing a Report

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.

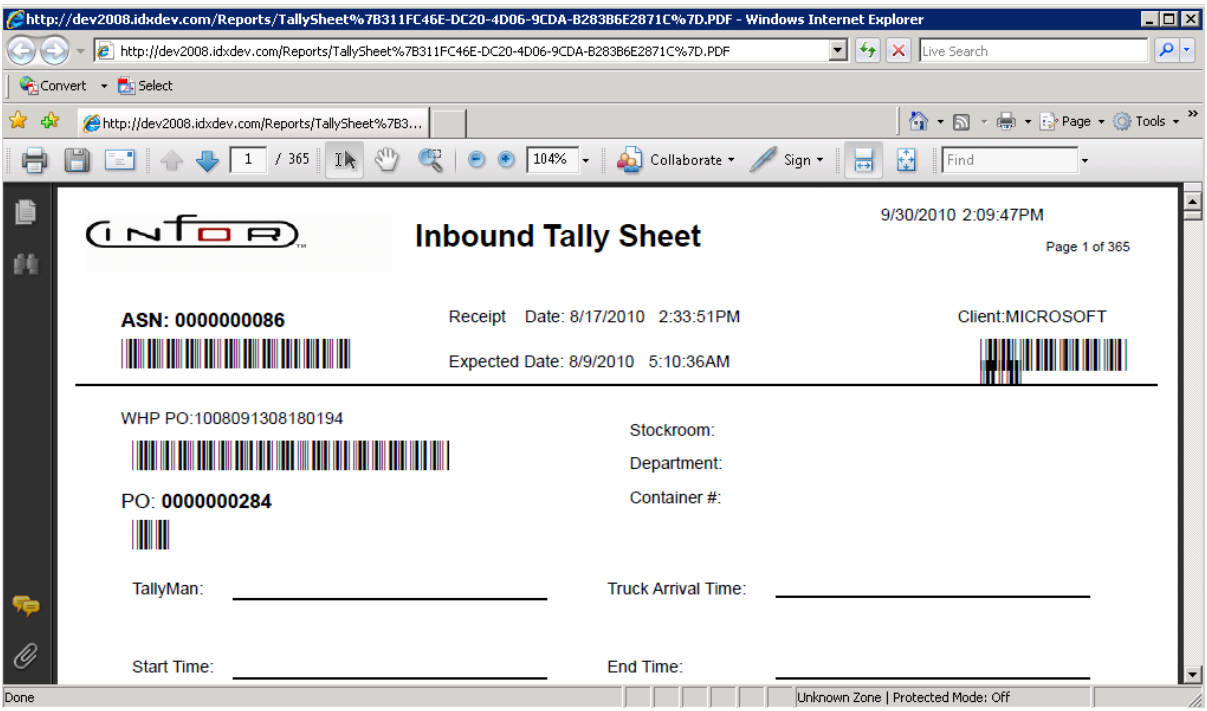


If the report is available, it will display in the status bar of Portal



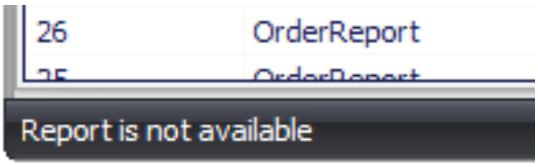
Where the Report name is appended a globally unique identifier for this particular job.

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.

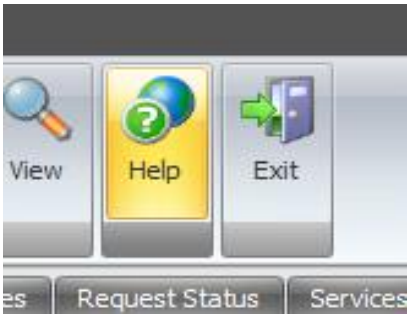
If the report has been removed from the server, the status bar will show that the Report is not available. You must re-run the report. If the report will not generate, and you are entering the correct parameters, please contact your administrator.



On line Documentation

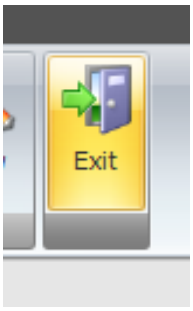
This guide can be downloaded from the Portal client as required.

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.

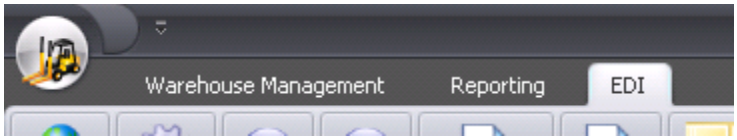


Portal EDI tab for Administrators

The Portal "EDI" tab holds information of the status, history and other information pertaining to the running of the IDX Schedulers. Permission must be granted to the user for them to see this tab and access the functionality.

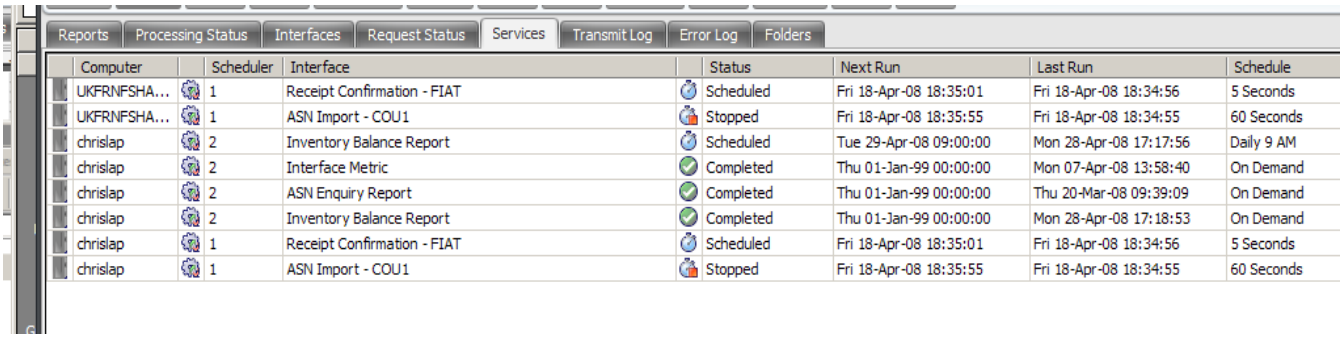
It is assumed setup and configuration have been completed as specified in the Administrators guide.

Once the user has logged into the Portal application, selecting the "EDI" 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 for your user.



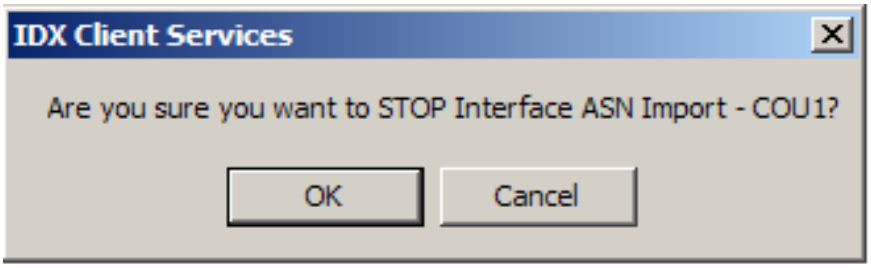
Computer	Scheduler	Interface	Status	Next Run	Last Run	Schedule
UKFRNFSHA...	1	Receipt Confirmation - FIAT	Scheduled	Fri 18-Apr-08 18:35:01	Fri 18-Apr-08 18:34:56	5 Seconds
UKFRNFSHA...	1	ASN Import - COU1	Stopped	Fri 18-Apr-08 18:35:55	Fri 18-Apr-08 18:34:55	60 Seconds
chrislap	2	Inventory Balance Report	Scheduled	Tue 29-Apr-08 09:00:00	Mon 28-Apr-08 17:17:56	Daily 9 AM
chrislap	2	Interface Metric	Completed	Thu 01-Jan-99 00:00:00	Mon 07-Apr-08 13:58:40	On Demand
chrislap	2	ASN Enquiry Report	Completed	Thu 01-Jan-99 00:00:00	Thu 20-Mar-08 09:39:09	On Demand
chrislap	2	Inventory Balance Report	Completed	Thu 01-Jan-99 00:00:00	Mon 28-Apr-08 17:18:53	On Demand
chrislap	1	Receipt Confirmation - FIAT	Scheduled	Fri 18-Apr-08 18:35:01	Fri 18-Apr-08 18:34:56	5 Seconds
chrislap	1	ASN Import - COU1	Stopped	Fri 18-Apr-08 18:35:55	Fri 18-Apr-08 18:34:55	60 Seconds

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.

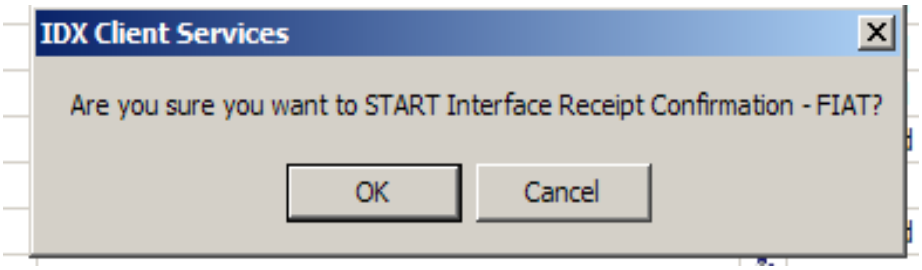
The client will ask you to confirm this function.



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.)

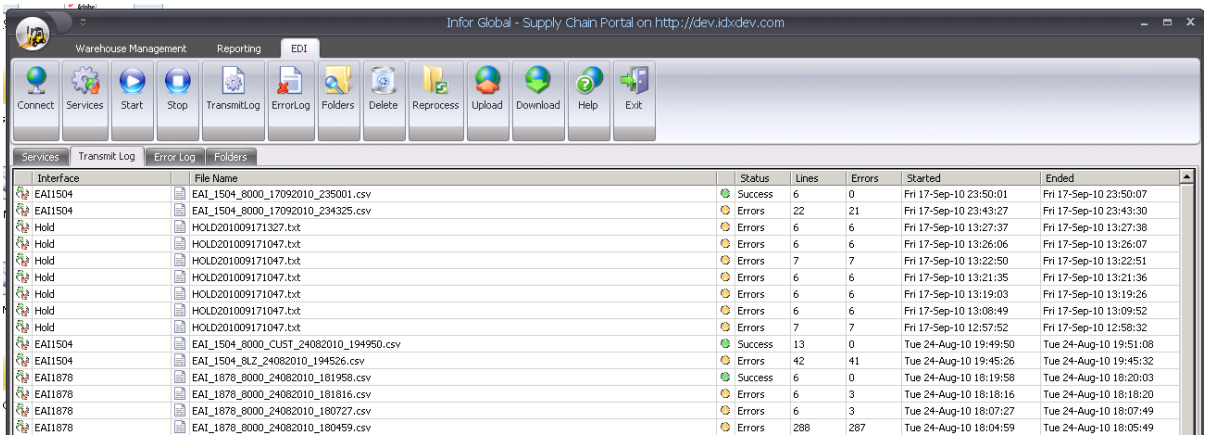
To Start any of the stopped interfaces, simply select the desired stopped interface and click the Start button in the refresh menu. After confirmed the start, the service will begin running again.



Transmitlog

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



Interface	File Name	Status	Lines	Errors	Started	Ended
EAI1504	EAI_1504_8000_17092010_235001.csv	Success	6	0	Fri 17-Sep-10 23:50:01	Fri 17-Sep-10 23:50:07
EAI1504	EAI_1504_8000_17092010_234325.csv	Errors	22	21	Fri 17-Sep-10 23:43:27	Fri 17-Sep-10 23:43:30
Hold	HOLD20100917327.txt	Errors	6	6	Fri 17-Sep-10 13:27:37	Fri 17-Sep-10 13:27:38
Hold	HOLD20100917047.txt	Errors	6	6	Fri 17-Sep-10 13:26:06	Fri 17-Sep-10 13:26:07
Hold	HOLD20100917047.txt	Errors	7	7	Fri 17-Sep-10 13:22:50	Fri 17-Sep-10 13:22:51
Hold	HOLD20100917047.txt	Errors	6	6	Fri 17-Sep-10 13:21:35	Fri 17-Sep-10 13:21:36
Hold	HOLD20100917047.txt	Errors	6	6	Fri 17-Sep-10 13:19:03	Fri 17-Sep-10 13:19:26
Hold	HOLD20100917047.txt	Errors	6	6	Fri 17-Sep-10 13:08:49	Fri 17-Sep-10 13:09:52
Hold	HOLD20100917047.txt	Errors	7	7	Fri 17-Sep-10 12:57:52	Fri 17-Sep-10 12:58:32
EAI1504	EAI_1504_8000_CUST_24082010_194950.csv	Success	13	0	Tue 24-Aug-10 19:49:50	Tue 24-Aug-10 19:51:08
EAI1504	EAI_1504_8LZ_24082010_194526.csv	Errors	42	41	Tue 24-Aug-10 19:45:26	Tue 24-Aug-10 19:45:32
EAI1878	EAI_1878_8000_24082010_181958.csv	Success	6	0	Tue 24-Aug-10 18:19:58	Tue 24-Aug-10 18:20:03
EAI1878	EAI_1878_8000_24082010_181816.csv	Errors	6	3	Tue 24-Aug-10 18:18:16	Tue 24-Aug-10 18:18:20
EAI1878	EAI_1878_8000_24082010_180727.csv	Errors	6	3	Tue 24-Aug-10 18:07:27	Tue 24-Aug-10 18:07:49
EAI1878	EAI_1878_8000_24082010_180459.csv	Errors	288	287	Tue 24-Aug-10 18:04:59	Tue 24-Aug-10 18:05:49

The following defines the columns and what they mean:

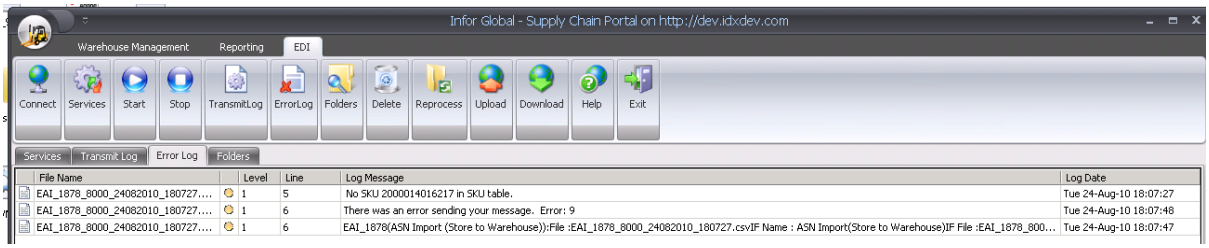
- Interface – Will match the interface name configured in the IDX manager, and visible from the Services Tab.
- File Name – Will display the file name that was run in the interface. This file can then be retrieved via the folders functions (described below).
- Status – The status (and colour icon) will 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 , Portal will return ALL Errors for the transmitlog entries.

This will open the Error Log screen, and the resulting Error log entries.



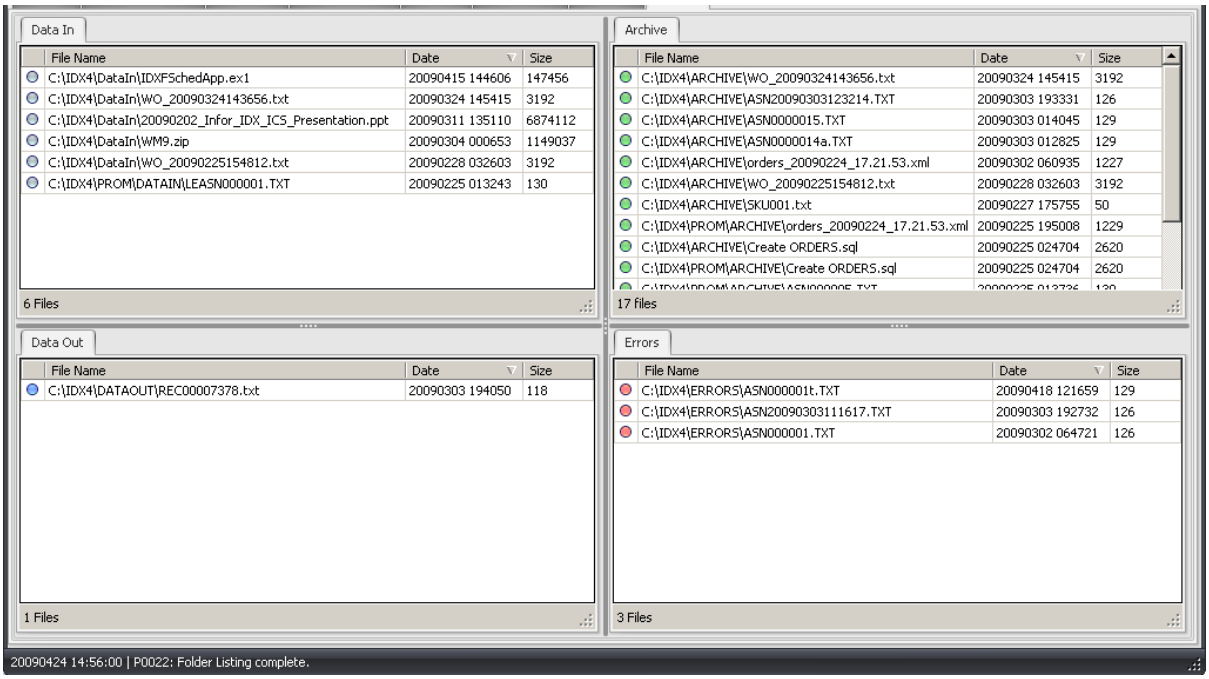
The fields displayed will then show the following fields:

- 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.



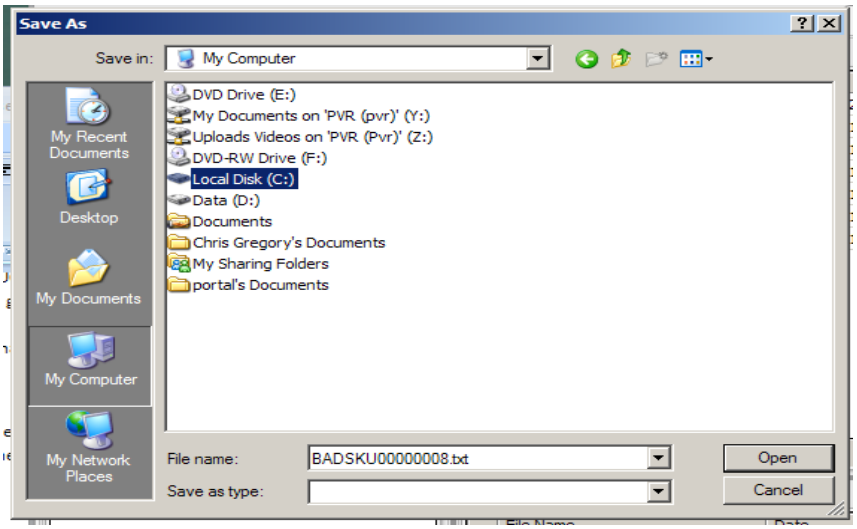
By Definition these folders represent the following and their actual locations are defined in the IDXDataFolder SQL table

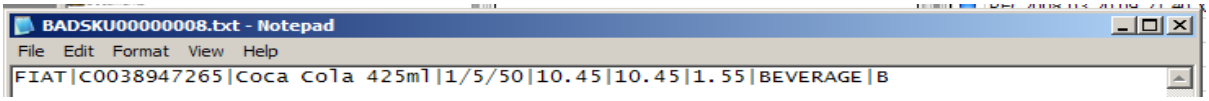
- Data in – The directory where inbound files are placed before processing
- Data Out – The directory where outbound files created by IDX will be placed.
- Archive – Directory where files that have been SUCCESSFULLY imported will be moved.
- Errors – This directory will contain any files that have had 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.

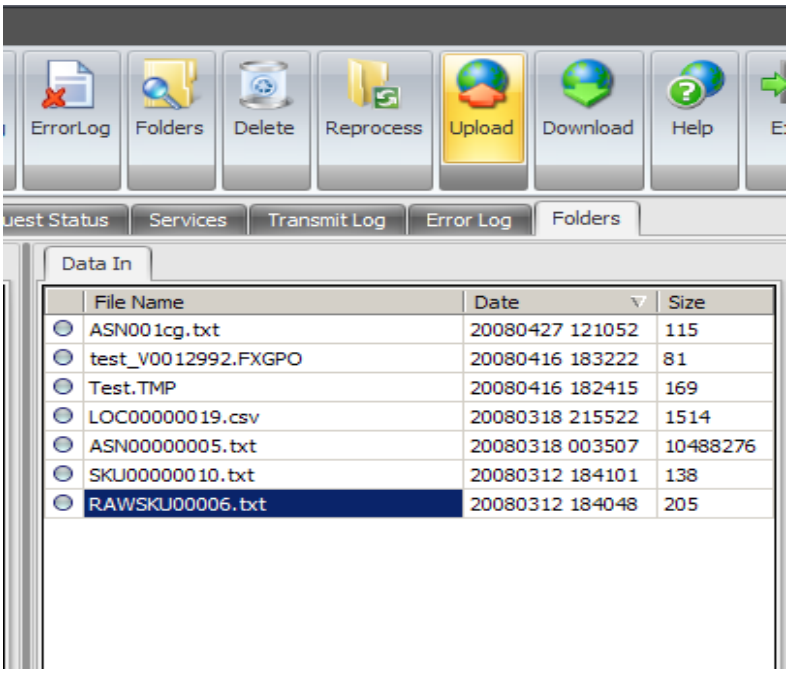




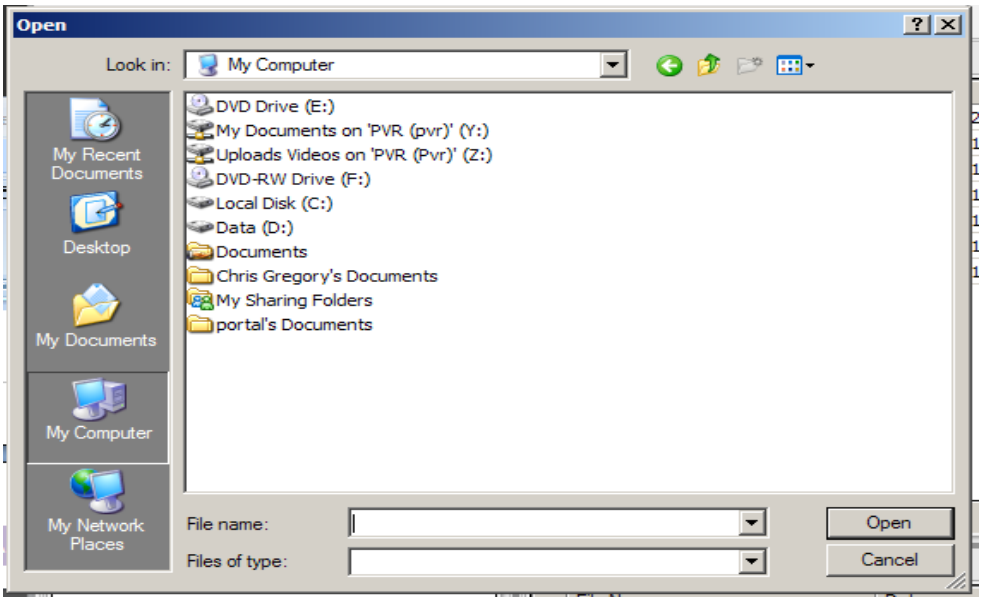
Uploading Files

Files can also be uploaded back to the Portal 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).

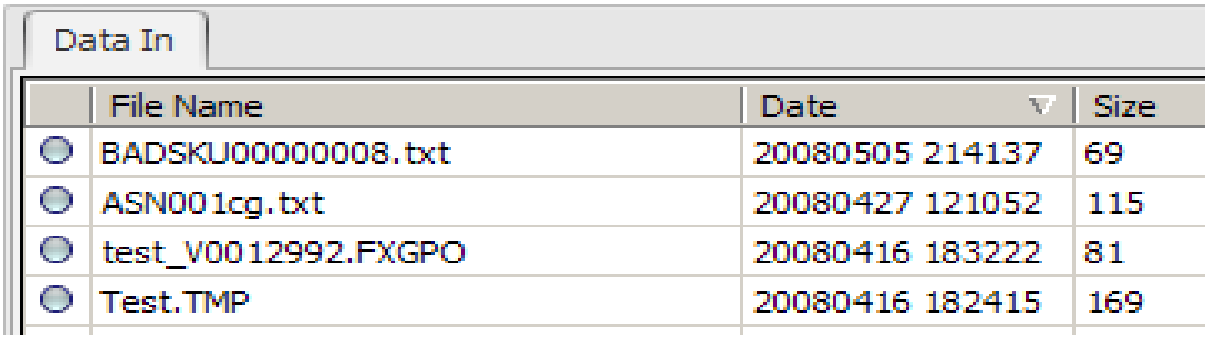
Select a file in the directory to upload into, then select the upload icon from the Refresh bar.



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 Reporting tab in Portal

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 scheduledjobs table in the IDX database. Ensure this is the same as the generated file name.