Installation Instructions

RLB AP Viewpoint Import

# Description

Windows forms application to perform secondary processing and upload RLB AP data files to Viewpoint. Users will launch the application, choose the AP batch to upload to Viewpoint and click ‘Upload’. If the secondary processing determines the exception counts have not changed, users will be alerted and asked if they wish to continue. When complete, the application will send email notifications with upload counts and attached log file to specified recipients. Notifications can be switched on and off. All application events are logged in specified log file and saved to the specified log folder. RLB data and associated Viewpoint record data are also logged in a database. UI exceptions will be reported directly to users, however if an application exception occurs, the exception will be logged in the log file and [if notifications are turned on] an exception email will be sent with the attached log file to the specified email recipients.

# Monitoring

Application activity is logged in configurable application log files and also in database tables.

* MCK\_INTEGRATION\RLBImportBatch (Adds batch records for all AR/AP import files)
* MCK\_INTEGRATION\RLBAPImportDetail (Adds detail record for all AP RLB data records)
* MCK\_INTEGRATION\RLBAPImportRecord (Adds import record for all AP data records added to Viewpoint)

# Database Files Location (TFS)

$/ViewPoint/Integration/RetailLockBox/McKinstry.ViewpointImport/Database

# Solution Location (TFS)

$/ViewPoint/Integration/RetailLockBox/McKinstry.ViewpointImport

## Projects

$/ViewPoint/Integration/RetailLockBox/McKinstry.ViewpointImport/McKinstry.Viewpoint.APImport

$/ViewPoint/Integration/RetailLockBox/McKinstry.ViewpointImport/McKinstry.ViewpointImport.Common

## Common Database Objects (In Installation Order)

|  |  |  |  |
| --- | --- | --- | --- |
| **File** | **Name** | **Type** | **Description** |
| dbo.RLBProcessNotes.sql | RLBProcessNotes | Table | Creates RLBProcessNotes table |
| dbo.RLBImportBatchStatus.sql | RLBImportBatchStatus | Table | Creates RLBImportBatchStatus table |
| dbo.RLBImportBatch.sql | RLBImportBatch | Table | Creates RLBImportBatch table |
| dbo.RLBImportDetailStatus.sql | RLBImportDetailStatus | Table | Creates RLBImportDetailStatus table |
| addRLBStatusData.sql |  | Data | Adds import batch and detail status data |
| dbo.mvwAPAllInvoices.sql | mvwAPAllInvoices | View | Creates mvwAPAllInvoices view |

## Application Database Objects (In Installation Order)

|  |  |  |  |
| --- | --- | --- | --- |
| **File** | **Name** | **Type** | **Description** |
| dbo.RLBAPImportRecord.sql | RLBAPImportRecord | Table | Creates RLBAPImportRecord table |
| dbo.mckvwRLBAPImportRecord.sql | mckvwRLBAPImportRecord | View | Record view with batch and detail ids |
| dbo.mckspAPUIAdd.sql | mckspAPUIAdd | Proc | Creates mckspAPUIAdd proc |
| dbo.mckspAPULAdd.sql | mckspAPULAdd | Proc | Creates mckspAPULAdd proc |
| dbo.mckspAPUIAddUnmatchedItem.sql | mckspAPUIAddUnmatchedItem | Proc | Creates mckspAPUIAddUnmatchedItem |
| dbo.mckspAPUIAddItemWithFile.sql | mckspAPUIAddItemWithFile | Proc | Creates mckspAPUIAddItemWithFile proc |

## Application Installation Files

|  |  |
| --- | --- |
| **File** | **Description** |
| CommonSettings.config | Configuration file for common RLB Viewpoint assembly |
| EntityFramework.dll | Required Entity Framework assembly |
| EntityFramework.SqlServer.dll | Required Entity Framework SQL assembly |
| LINQtoCSV.dll | Required assembly for LINQtoCSV program |
| log4net.dll | Required assembly for log4net logging program |
| Logging.config | Required logging configuration file used by log4net logging program |
| McKinstry.Viewpoint.APImport.exe | AP Viewpoint Import program |
| McKinstry.Viewpoint.APImport.exe.config | Configuration file for AP Viewpoint Import program |
| McKinstry.ViewpointImport.Common.dll | Common assembly for Viewpoint RLB programs |
| WinSCP.exe | Required executable for WinSCP FTP program |
| WinSCPnet.dll | Required assembly for WinSCP FTP program |

## Local Settings (McKinstry.Viewpoint.APImport.exe.config)

|  |  |  |
| --- | --- | --- |
| **Setting** | **Description** | **Notes** |
| LogFileName | Sets log file name | All log files will be appended with date |
| SendNotificationEmail | Sets whether email notifications are sent |  |
| EmailSubject | Sets email notification subject |  |
| FromEmail | Sets email notification from email | Single email |
| FromEmailDisplayName | Sets email notification from display name | Can be any text |
| ToEmail | Sets email notification to emails | Can be comma delimited |
| CcEmail | Sets email notification cc emails | Can be comma delimited. Can be blank. |

## Relevant Global Settings (CommonSettings.config)

|  |  |  |
| --- | --- | --- |
| **Setting** | **Description** | **Notes** |
| ARFilePrefix | Sets file prefix for AR import files | Valid files begin with this prefix |
| ARProcessFolderLocation | Sets the folder location for AR processing | **Use network path (e.g. \\mckviewpoint)** |
| APArchiveFolderLocation | Sets path where AP files will be archived | **Use network path (e.g. \\mckviewpoint)** |
| APLogFileFolderLocation | Sets path where log files will be written |  |
| APUserAccount | Sets account of user adding records | MCKINSTRY\vpsvcacct |
| APModule | Viewpoint module | AP |
| APForm | Viewpoint form | APUnappInv |
| APUnmatchedCompany | Unmatched AP company | 1 |
| APUnmatchedVendorGroup | Unmatched AP vendor group | 1 |
| APUnmatchedVendor | Unmatched AP vendor | 9 |
| MailSmtpHost | Sets STMTP server for email notifications |  |
| MckIntegrationConnectionString | Sets the connection to Integration database | Change data source per environment |
| ViewpointConnectionString | Sets the connection to Viewpoint database | Change data source per environment |

## Installing Database Objects

1. Get database files from TFS
2. Open connection to database using SQL Server Management Studio
3. Run SQL scripts in above Database Objects table in the specified order

## Installing Application

1. Create installation folder for application.
   1. e.g. C:\Scripts\RetailLockBox\APImport
2. Open installation folder for RDS application
   1. Staging: \\serdw08\APImport Stage
   2. Production: \\serdw08\APImport Prod
3. Get Solution from TFS and build
   1. Output files will be found in build output folder (debug or release)
      1. Debug: ..\McKinstry.Viewpoint.APImport\bin\Debug
      2. Release: ..\McKinstry.Viewpoint.APImport\bin\Release
4. Copy Installation Files (above table) to Installation Folder(s)
5. Change the Application Settings for each instance
   1. Open the settings file ‘McKinstry.Viewpoint.APImport.exe.config’ in text editor.
   2. Ensure the settings (above table) are set
   3. Open the settings file ‘CommonSettings.config’ in text editor
   4. Ensure the settings (above table) are set

## Running Application

Command Line

1. Open a command prompt and change directory to the installation location
   1. (e.g. C:\Scripts\RetailLockBox\APImport>)
2. Run the application
   1. Run command (e.g. McKinstry.Viewpoint.APImport.exe)

RDS

1. Open RDS connection
   1. Click on the appropriate icon for the environment of your choice:
      1. Staging vs Production

