Installation Instructions

Viewpoint Company Move

# Description

Windows console application to move records between companies in Viewpoint. The application can be run on a schedule (Windows Task Scheduler) or run manually via the command line. If an 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.

The program currently executes only one company move process (AP Company Move), though it can be extended to include additional processes (e.g. AR Company Move) set with a command argument (e.g. “AP”/”AR”).

### AP Company Move

The AP Company Move process moves AP unapproved invoice records from one company to another specified company. Users set the new company value via a custom field in the AP Unapproved Invoice Entry screen in Viewpoint. The custom company move field *udDestAPCo* is saved in the Viewpoint bAPUI unapproved invoice header table. Records with this value set will be picked up by the application and the move executed.

**Move Process**

AP invoice records and associated attachments flagged for company move are created in the new company and then removed from the existing company. All application events are logged in specified log file and saved to the specified log folder. Each AP invoice company move attempt along with associated attachment data are recorded in a database. The database logs success or failure information for each AP record and attachments. Overall success of the move means a clean creation of new AP record and attachments, attachment file copy, as well as deletion of old AP record and attachments.

The expected interval for AP Company Move application is every five minutes.

**Error Reporting**

AP company move errors are fetched and saved in an Excel file with relevant AP record information and error messages. The error file is attached to an error email notification.

Error reporting in the AP Company Move application can be controlled in hourly intervals (from as frequent as each hour, to once any number of hours 4/8/16/30, etc.).

The expected error reporting interval for the AP Company Move application is every 4 hours.

**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\RLBARImportDetail (Adds detail record for all AR RLB data records)
* MCK\_INTEGRATION\RLBARImportRecord (Adds import record for all AR 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.Viewoint.CompanyMove

$/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.CompanyMoveMetrics.sql | CompanyMoveMetrics | Table | Creates CompanyMoveMetrics table |
| dbo.AttachCompanyMove.sql | AttachCompanyMove | Table | Creates AttachCompanyMove table |
| dbo.mckspHQATAdd.sql | mckspHQATAdd | Proc | Creates mckspHQATAdd proc |
| dbo.mckspHQATDelete.sql | mckspHQATDelete | Proc | Creates mckspHQATDelete proc |

## AP Company Move Database Objects (In Installation Order)

|  |  |  |  |
| --- | --- | --- | --- |
| **File** | **Name** | **Type** | **Description** |
| dbo.APCompanyMove.sql | APCompanyMove | Table | Creates APCompanyMove table |
| dbo.mckfnAPCompanyMove.sql | mckfnAPCompanyMove | Func | Creates mckfnAPCompanyMove func |
| dbo.mckfnAPCompanyMoveError.sql | mckfnAPCompanyMoveError | Func | Creates mckfnAPCompanyMoveError func |
| dbo.mckspAPUIAdd.sql | mckspAPUIAdd | Proc | Creates mckspAPUIAdd proc |
| dbo.mckspAPUIDelete.sql | mckspAPUIDelete | Proc | Creates mckspAPUIDelete 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.CompanyMove.exe | Viewpint Company Move program |
| McKinstry.Viewpoint.CompanyMove.exe.config | Configuration file for Viewpint Company Move 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.CompanyMove.exe.config)

|  |  |  |
| --- | --- | --- |
| **Setting** | **Description** | **Notes** |
| ApplicationKey | Used to identify application | Referenced in metrics table |
| NotificationHourInterval | Sets how often error notifications are sent out |  |
| LogFileFolderLocation | Sets path where log files will be written |  |
| 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** |
| 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\ViewointCompanyMove
2. Get Solution from TFS and build
   1. Output files will be found in build output folder (debug or release)
      1. Debug: ..\ McKinstry.Viewoint.CompanyMove\bin\Debug
      2. Release: ..\McKinstry.Viewoint.CompanyMove\bin\Release
3. Copy Installation Files (above table) to Installation Folder(s)
4. Change the Application Settings for each instance
   1. Open the settings file ‘McKinstry.Viewpoint.CompanyMove.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\ViewpointCompanyMove >)
2. Run the application
   1. Run command (e.g. McKinstry.Viewpoint.CompanyMove.exe “AP”)

Windows Scheduled Task

For information on creating and scheduling tasks with Windows Task Scheduler, see:

<https://technet.microsoft.com/en-us/library/cc766428.aspx>