Cintra iQ

Interface Management

User Guide

Cintra HR and Payroll Services Ltd
Computer House
353 High Street
Gateshead
Tyne & Wear
NE8 1ET

Phone +44 (0) 191 478 7000
Fax +44 (0) 191 478 6060

Change Management

The following table contains a list of changes that have occurred between releases. Click on a link to access the relevant information.

iQDTS Version	Document Section	Date change was made

CONTENTS

iQ's Interface Management GUI

More Information

CHAPTER 1

About Interface Management

The **Interface Management** module within **Cintra iQ** provides a customisable solution to importing data from and exporting data to external files. Now, through the **Interface Management** GUI, you can perform the following:

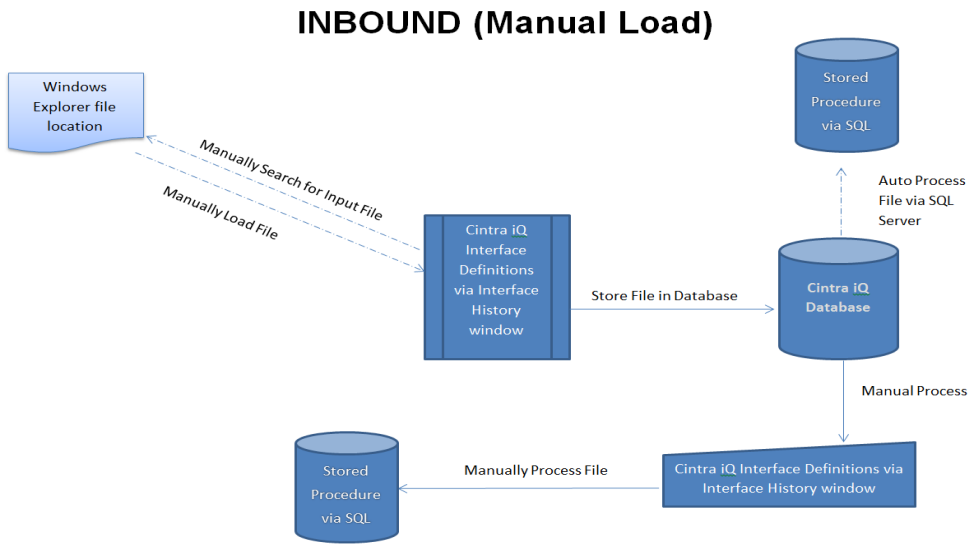
- Load import files
- Process import files
- Produce outbound files
- Save outbound files to disc.

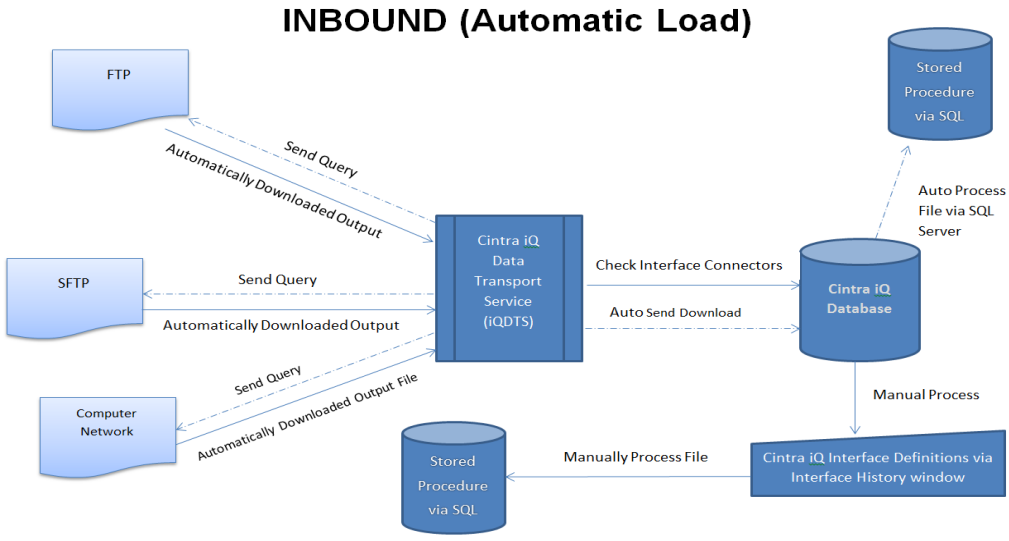
Note: The Implementation team must install and configure **iQDTS**, and create a **Stored Procedure (SP)** before data files can be manually or automatically sent to and from a third party location.

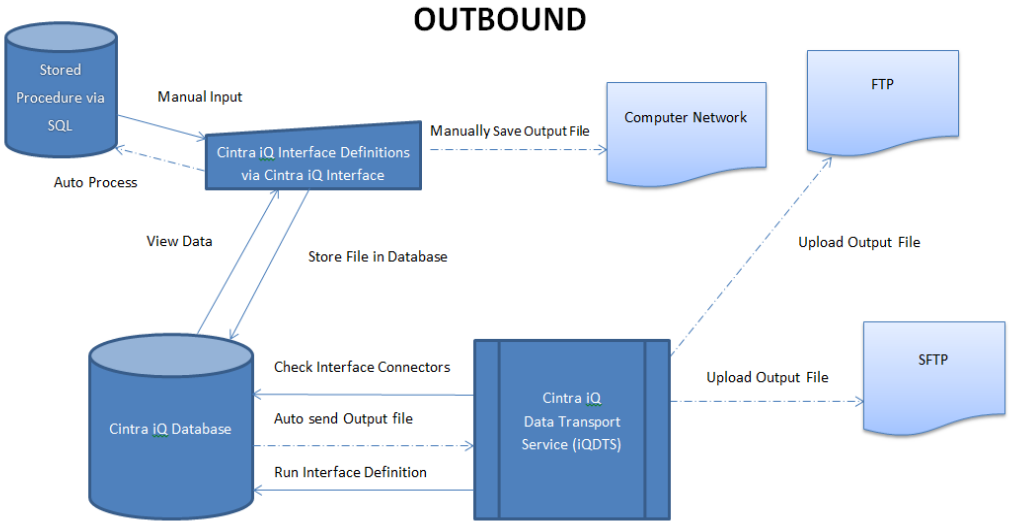
This chapter explains the following:

File Transport Overview

The following charts detail the **Inbound** and **Outbound** flow of the transported file.






OUTBOUND
Stored Procedure via SQL
Manual Input
Cintra iQ Interface Definitions via Cintra iQ Interface
Auto Process
Manually Save Output File
Computer Network
FTP
View Data
Store File in Database
Upload Output File
Cintra iQ Database
Check Interface Connectors
Auto send Output file
Run Interface Definition
Cintra iQ Data Transport Service (iQDTS)
Upload Output File
SFTP

CHAPTER 2

iQ Data Transport Service

As the implementation provider, you will need to ensure that the **iQ Data Transport Service (iQDTS)** is running in order for both the **Cintra iQ INBOUND** and **OUTBOUND** files transfer to and from third party locations automatically. These locations could be **FTP/SFTP** servers or a computer network.

This chapter explains the following:

About iQ Data Transport Service

The **iQ Data Transfer Service** (**iQDTS**) is a service that runs in the background of **Cintra iQ** and automatically transfers **iQ** database files to and from the following locations:

- **FTP**, **SFTP**, **FTPS** and **SMTP** servers (external locations)
- **File Shares** (**LAN**) (computer network)
- Emails with attachments (**iQ** database)

Note: **iQDTS** does not need to be used for importing or exporting **Outbound** files when you want to manually save the files.

Before you begin...

Set up a dedicated non-interactive **Windows** domain account to run the **iQDTS** service. Using a non-expiring password ensures that the service remains running without interruption. This account should have authorisation to access the **iQ** database and the required services such as (**email**, **FTP/SFTP**, **Filesystem** etc.).

IMPORTANT! This account must be a member of the **DataTransferService iQ** database role.

Installing iQDTS

You can install the **iQDTS** program on either a server or a local machine. It appears as a service in **Windows Service** window.

> **Note: iQDTS** does not use the file system to store any data or log files. It only reads from the disk it is running on. It does not write.

To install iQDTS

1. Navigate to where the **iQDTS** files are kept on the appropriate network.

   > **Note:** If you are installing from the Cintra's network, you can find the files in the default folder location: **{Your install folder}:\Cintra IQ\IQDTS**.

2. Configure the **iqdts.exe.config** file, by setting the following search string to the appropriate values.

```
<add name="db1"
connectionString="Data Source=server\ instance;Initial
Catalog=DatabaseName;Integrated Security=True"
providerName="System.Data.SqlClient"/>
```

Name	Description
Data Source	**SQL Server** instance name
Initial Catalog	Database name
Integrated Security	**True** = Windows account runs the **iQDTS** **False** = Not recommended For more information, contact **Cintra Support**

3. Configure the **iqdts.exe.config** file, by setting the following keys:

   <appSettings>

   <add key="RefreshIntervalSeconds" value="??"/>

   <add key="IntfActive" value="??"/>

   <add key="SmtpActive" value="??"/>

   </appSettings>

Name	Description
`RefreshIntervalSeconds`	**iQDTS** reads the **iQ** database every `RefreshIntervalSeconds` seconds to retrieve connector information. This provides the basis for the connector interval.
`IntfActive`	To activate/disable **FTP/File** connectors, set `IntfActive` to **True** or **False** respectively.
`SmtpActive`	To activate/disable email connectors, set `SmtpActive` to **True** or **False** respectively.

4. Register the service, by running the **install.bat** file. This adds the service to **Windows OS**.
5. Test the **Inbound** and **Outbound** connections. For more information, see **How do I diagnose connection errors?**

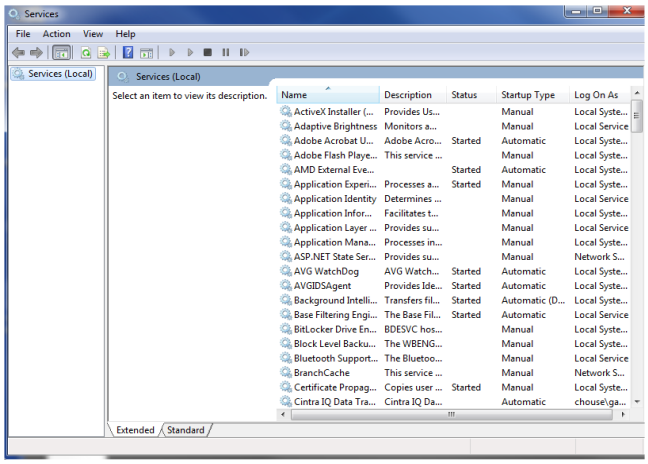
iQ Data Transport Service (iQDTS) FAQ

How do I check that the iQDTS service is installed on Windows Operating System?

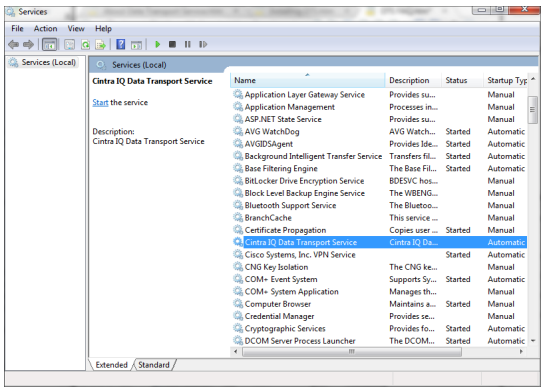
You can check to see if **iQDTS** is installed on **Windows Operating System** (**OS**) by checking the **Services** window.

To locate iQDTS in Windows

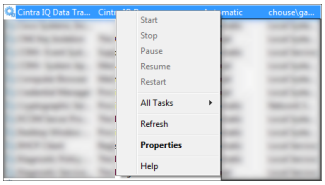
1. Navigate to the **Services** window either in **Windows 7** or **Windows 8**. For more information, see **How do I access Windows services?**
2. Click **Services.** The **Services** window appears.



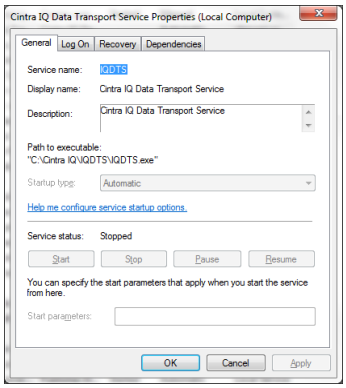
3. Locate **Cintra IQ Data Transport Service**.



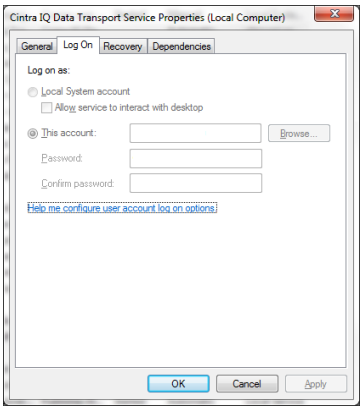
4. Right-click **Cintra IQ Data Transfer Service**. A menu appears.



5. Select **Properties**. The **Cintra IQ Data Transport Service Properties** window appears.



6. Click the **Log On** tab. The **Log on as:** details are displayed.



7. Ensure the correct non-interactive **Windows Domain** account is used. Otherwise, a **Log On** error message appears.

How does iQDTS use the settings found in iQ's Interface Connector definitions window?

The definition's **Interface Connector** settings are stored in the **SYSADM.INTF_CONNECTOR** table within the **Cintra iQ** database.

> **Note:** These settings are created/amended via the **Interface Connector** window. For more information, see **About the Interface Connector window (Inbound)** or **About the Interface Connector window (Outbound).**

iQDTS queries the database to find out what settings are required to transfer either an **Inbound** file or an **Outbound file**. Once the appropriate settings are found, **iQDTS** then imports or exports the files to the designated locations.

How do I change the time intervals iQDTS takes to check the iQ database for connection definitions?

iQDTS reads the **iQ** database every `RefreshIntervalSeconds` seconds to retrieve connector definitions. This provides the basis for the connector interval.

To set the intervals, replace the value in <add key="`RefreshIntervalSeconds`" value="10"/> in the **iqdts.exe.config** file.

How do I activate/disable any FILE connector?

To activate/disable FTP/File connectors, set `IntfActive` to true or false in the **iqdts.exe.config** file.

How do I activate/disable Email connectors?

To activate/disable email connectors, set `SmtpActive` to true or false in the **iqdts.exe.config** file.

How does iQDTS collect information?

- **Inbound** files. **iQDTS** polls the external locations between set intervals, constantly checking to see if a specific file(s) is available to be downloaded to the **iQ** database.
- **Outbound** files. **iQDTS** polls the **iQ** database between set intervals, constantly checking to see if a specific file(s) is available to be uploaded to a third party location.
- **Email**. **iQDTS** searches within the **iQ** database for emails that have attachments and sends them to a **SMTP** server that is specified in the **Interface Connector** definition.

How do I diagnose connection errors?

You can test the connection between **iQDTS** and a **FTP/File** server from the command window by running `IQDTS -service -debug`. This gives you exact information about what **iQDTS** is doing as it downloads or uploads files to and from a **FTP** server.

For a complete test, run with the same **Windows** account as that of the **iQDTS**.

> **Note:** You may need to use `runas` and ensure that the account has interactive rights for the duration of the test.

Extra diagnostic tool for FTP servers

If the general tests for a **FTP** server are not what you expect, use the following diagnostic tool to perform a series of upload/list/download/verify tests to ensure the server is performing correctly for **FTP** servers.

```
IQDTS -testftp -u:"username" -p:"password" -d:"ftplocation"
-pr:"protocol" -f:filenameprefix -minf:minfilesize
-maxf:maxfilesize -r:repeattimes
```

Example:

```
IQDTS -testftp -u:"fred" -p:"secret" -d:"ftp://example.com/IN/"
-pr:"ftps" -f:PREFIX -minf:1 -maxf:100 -r:1
```

How do I know iQDTS is running?

Look in either the **Upload** or **Download Logs** within **iQ**'s **Interface Connector** definitions. Or, check the server itself through the command line mode.

Where are the third party authentication details stored?

The user name and passwords are stored in the **iQ** database.

Where do I find the iQDTS installation files?

The files are bundled with **Cintra iQ** upon release.

How do I uninstall iQDTS?

Run the **uninstall.bat** file that came with the **Cintra iQ** release.

Can multiple iQDTS run on multiple servers?

iQDTS can run on multiple servers, but each **Inbound**/**Outbound connector** must stipulate which server carries what **iQDTS** service. For instance. **iQDTS** on **Server A** can only access information on machine **A**; **iQDTS** on **Server B** can only access information on machine **B**.

Can iQDTS communicate with multiple databases?

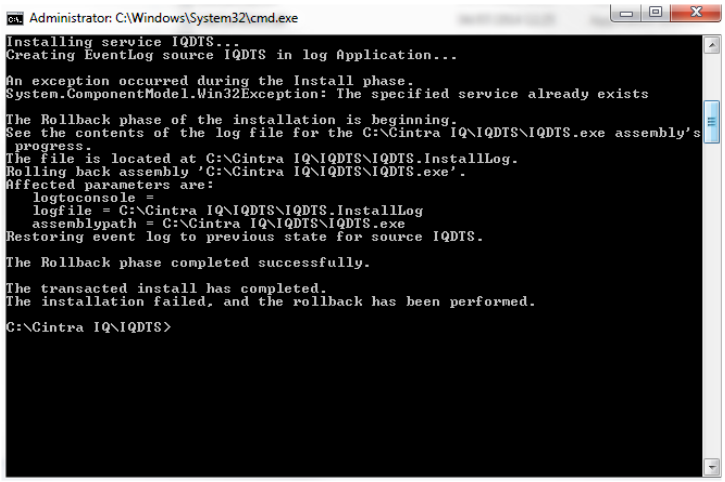
A single instance of **iQDTS** can communicate with multiple **iQ** databases and multiple **FTP/FILE/SMTP** servers as long as it sits on a single application server.

EXAMPLE:

```
<?xml version="1.0"?>

<configuration>

<appSettings>

        <add key="RefreshIntervalSeconds" value="10"/>

        <add key="IntfActive" value="true"/>

        <add key="SmtpActive" value="true"/>

</appSettings>

<connectionStrings>

        <clear/>

         <add name="db1" connectionString="Data Source=SERVER\INSTANCE;Initial
         Catalog=DATABASE;Integrated Security=True"
         providerName="System.Data.SqlClient"/>

         <add name="db2" connectionString="Data Source=SERVER2\INSTANCE2;Initial
         Catalog=DATABASE;Integrated Security=True"
         providerName="System.Data.SqlClient"/>

</connectionStrings>

        <startup>

<supportedRuntime version="v2.0.50727"/>

        </startup>

</configuration>
```

How does iQDTS run?

Although normally run as a **Windows** service, **iQDTS** can be run in command-line mode. This shows the progress and debug information necessary to diagnose connection issues.



Note: Parallelism (when two or more queues are processed simultaneously) is not used. Therefore, if a large number of files are held in a queue, the other queues will be processed one at a time as well.

How does iQDTS report errors?

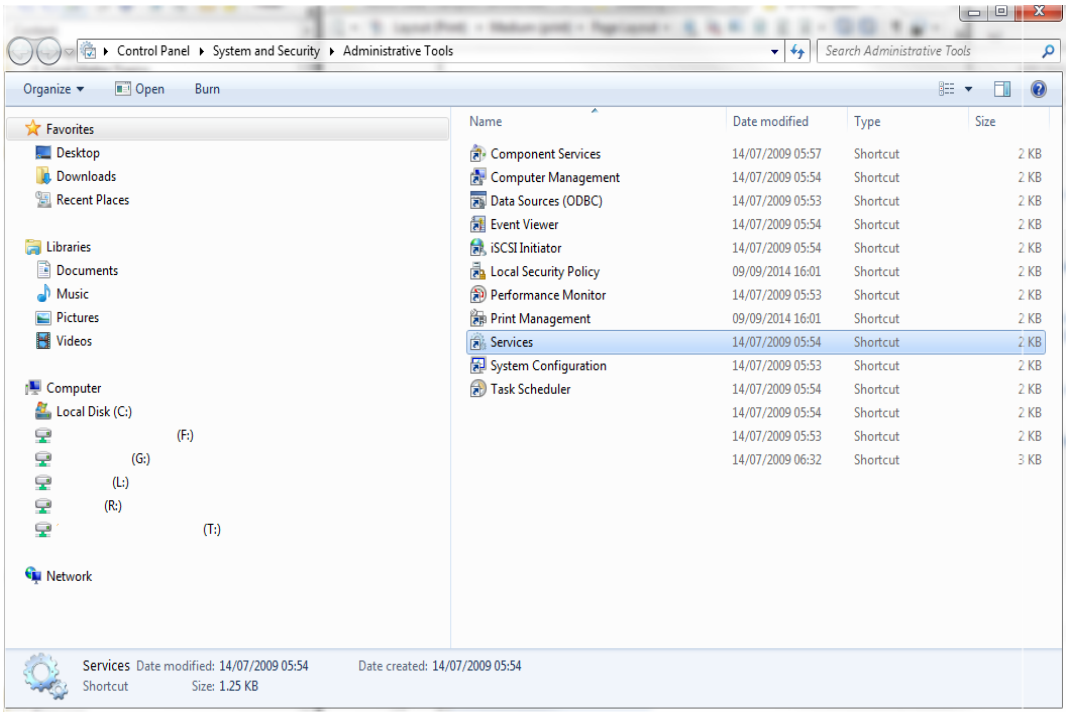
Standard operational errors are reported in the **iQ** database in either the **Download Log** of the **Interface Connector (Inbound)** window or the **Upload Log** of the **Interface Connector (Outbound)** window.

Because errors can accumulate very quickly due to the process of repetative polling, the frequency of reporting error messages can be set in `INTQ_ErrorLog_Dead_Time` or **iQ**'s **Interface Connector** (**Inbound/Outbound**) window's **Processing** section.

Note: If **iQDTS** cannot report errors to the **iQ** database,(e.g. incorrect authorisation), they are reported in the **Windows Event Log.**

How do I access Windows services?

Navigate to Control Panel> System and Securities> Administration Tools. A list of programs appears with **Services** highlighted.



CHAPTER 3

iQ's Interface Management GUI

The **Interfaces Definition** window within **Cintra iQ** is the interface that allows you to perform the following:

- Load import files
- Process import files
- Produce outbound files
- Save outbound files to disk.

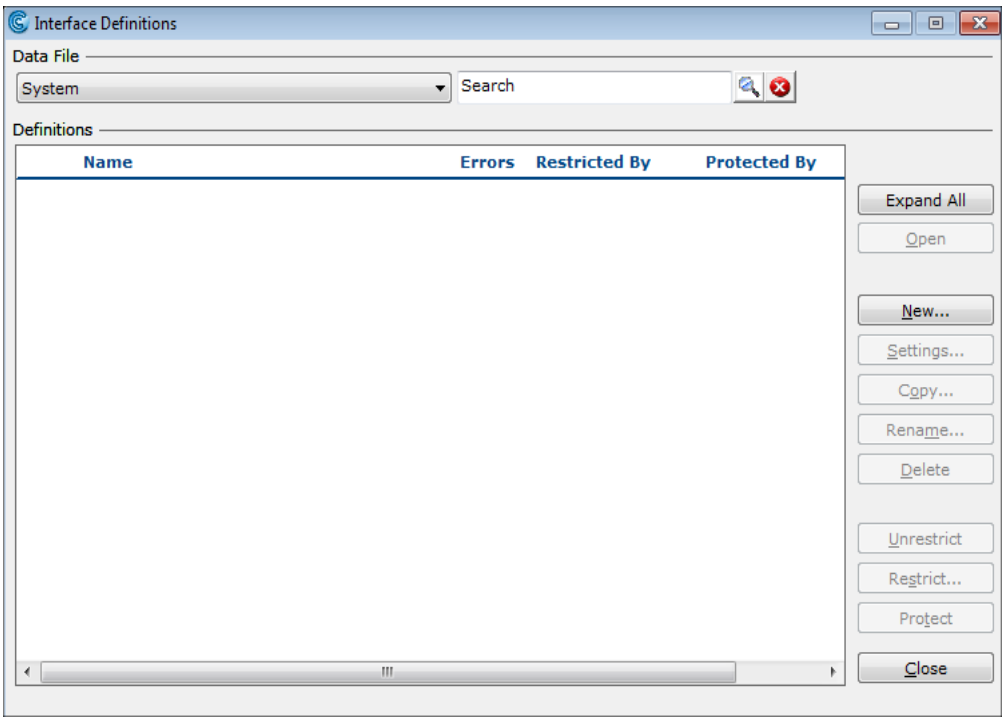
This chapter explains the following:

About the Interface Definitions Window

The **Interface Definitions** window and its sub-sets allow you to perform the following:

- Automatically connect to external systems and either import files into the **Cintra iQ** database or export files from the database to external locations such as **FTP**, **SFTP**, **SMTP** and network servers.
- Manually retrieve import files from **Windows Explorer** file locations and load them into the **Cintra iQ** database or save files from the database to **Window Explorer** locations or to disk.

Search path: Tools> Interfaces



Buttons

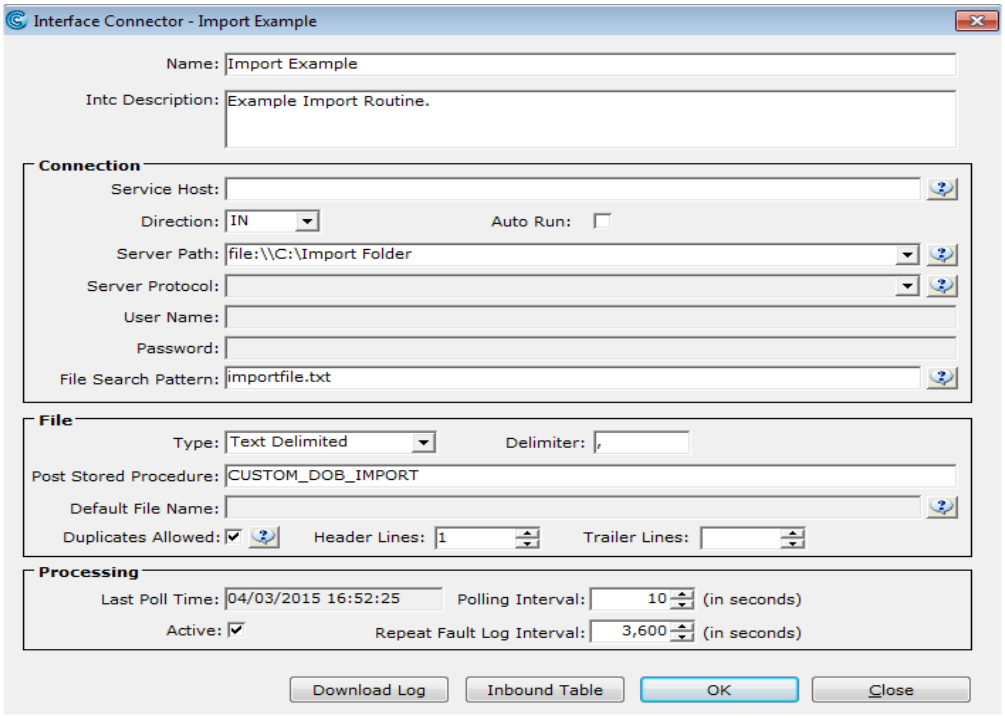
Note: You must select an existing definition to enable the inactive buttons.

Name	Description
Data File	Cannot change as it is a system definition.
Search	Search for the desired definition name.
Definitions	View an existing definition.
Expand/Collapse All	Toggle this button to expand or collapse the **Definitions** tree view.
Open	Click this button to open the desired definition in the **Interface History** window. For more information, see **About the Interface History Window**.
New	Click this button to create a new definition.
Settings	Click this button to modify an existing definition.
Copy	Click this button to make a copy of an existing definition. **Note:** You cannot copy a definition you do not have access to.
Rename	Click this button to change an existing definition title.
Delete	Click this button remove a definition from the **Definitions** list.
Unrestrict	Click this button to allow all users access to the definition.
Restrict	Click this button to allow only specified users to see the definition. **Note:** This button displays the **Access Details** window where you can restrict one or more users.
Protect/Unprotect	Toggle this button to allow only you, the **Definitions** creator, to modify the definition.
Close	Click this button to save and close the **Interface Definitions** window.

About the Interface Connector Window (Inbound)

This window contains the settings to import files into the **iQ** database from a third party location.

Search path: Tools> Interfaces>Interface Definitions window> New.../Settings



The **Interface Connector (Inbound)** window contains the following sections:

Description

Name	Description
Name:	This name is carried over from the previous entry.
Intc Description:	Enter a brief description of the definition.

Manual Connection

This field must be set to manually connect to **iQDTS**.

Name	Description
Direction:	Select **IN** to retrieve **Inbound** files.

Automatic Connection

These fields must be set to automatically connect to **iQDTS**.

Name	Description
Service Host:	Leave this field blank unless **iQDTS** needs to run on multiple servers. If so, enter the server name that runs the connection.
Direction:	Select **IN** to retrieve **Inbound** files.
Auto Run:	NOT USED FOR INBOUND FILES.
Server Path:	Enter the location path of where you want **iQDTS** to connect to, in order for it to search for and retrieve the desired files.
Server Protocol:	Allows protocol-specific flags to be introduced, space delimited. Colon specified example: Port: ftp://server**:81**/path Currently if **FTP**, **FTPS** or **SFTP**, then this protocol overrides the protocol suggested in the **Server Path**. Example: **ftps:**//server/path **GHOST** is an alternative process to treating files. Enter **GHOST** in the **Server Protocol** field if you do not want files to be deleted from the server. This is useful in testing scenarios.
User Name:	Enter the **ID** name given to you by the owners of the **FTP/SFTP** sites. This, together with the password, accesses the **FTP/ SFTP** server.
Password:	Enter your password given to you by the owners of the **FTP/SFTP** servers. This, together with the password, accesses the **FTP/SFTP** server.
File Search Pattern:	Enter the file extension **iQDTS** will search and collect from the external servers. e.g. **filename.txt**, **file*txt**, ***Note:** * wild cards are accepted.

File

Name	Description
Type:	Select the file type **iQDTS** picks up. e.g. **XML**, **Text Delimited** or **Text Fixed Width**.
Delimiter:	Enter either the delimiter **|**, **:** or **,** to separate text strings. **Note:** This field becomes active when **Text Delimited** is selected as type.
Post Stored Procedure:	Enter the name of the procedure, created in **SQL** that runs after the file is downloaded and is imported into the **iQ** database. The procedure will process the loaded inbound files and distribute their data.
Default File Name:	NOT USED FOR INBOUND FILES.
Duplicates Allowed:	Check the **Duplicates allowed** check box to allow **iQDTS** to re-import a file of the same name, as one already imported.
Header Lines:	Select the number of **Header Lines** you do not want **iQDTS** to read when it processes the file.
Trailer Lines:	Select the number of **Trailer Lines** (Footer) you do not want **iQDTS** to read when it processes the file.

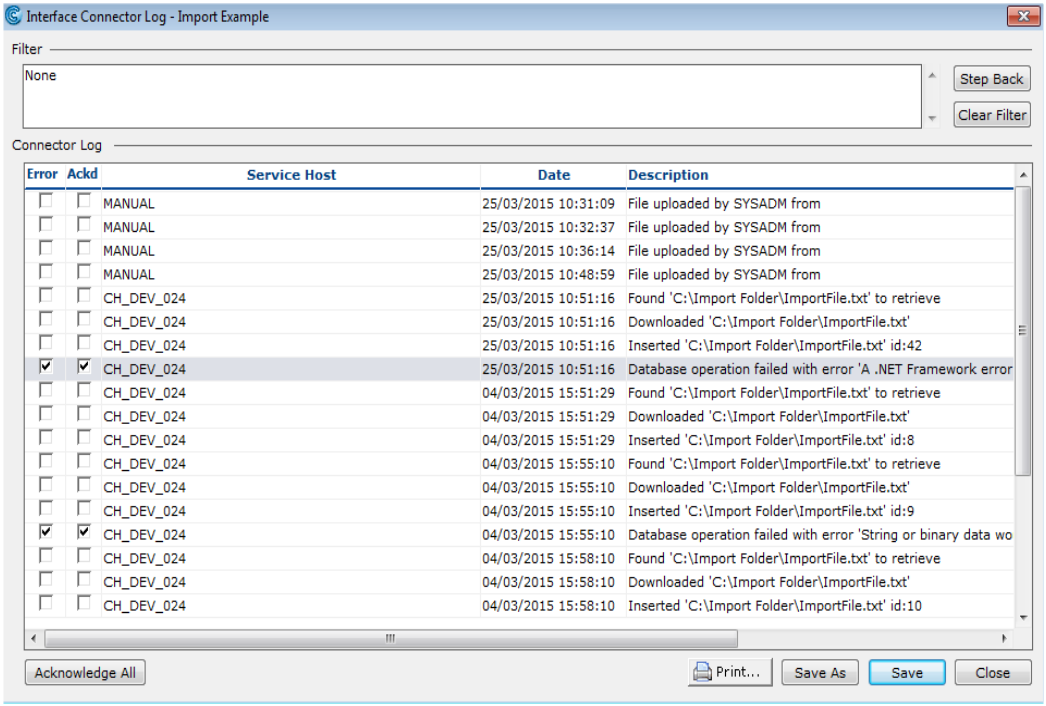
Processing

Name	Description
Last Poll Time	This identifies the last time **iQDTS** checks to see if files are available.
Polling Interval	Set the number of seconds that **iQDTS** waits to search for files at the third party location.
Active	Check the **Active** check box to activate **iQDTS** to look for files.
Repeat Fault Log Interval	Select the number of seconds before an error is redisplayed in the log file.

Interface Connector Log window (Download Log button)

This window displays any errors and if the errors have been acknowledged. Certain errors require user input to stop them from re-occurring. An error may be a change in user name or password etc.

Search path: Tools> Interfaces> New/Settings> Interface Connector window> Direction: IN> Download Log button



Note: To filter within the **Connector Log** pane, double click one or more column values to filter rows down to a specific value. The value(s) appears in the **Filter** pane.

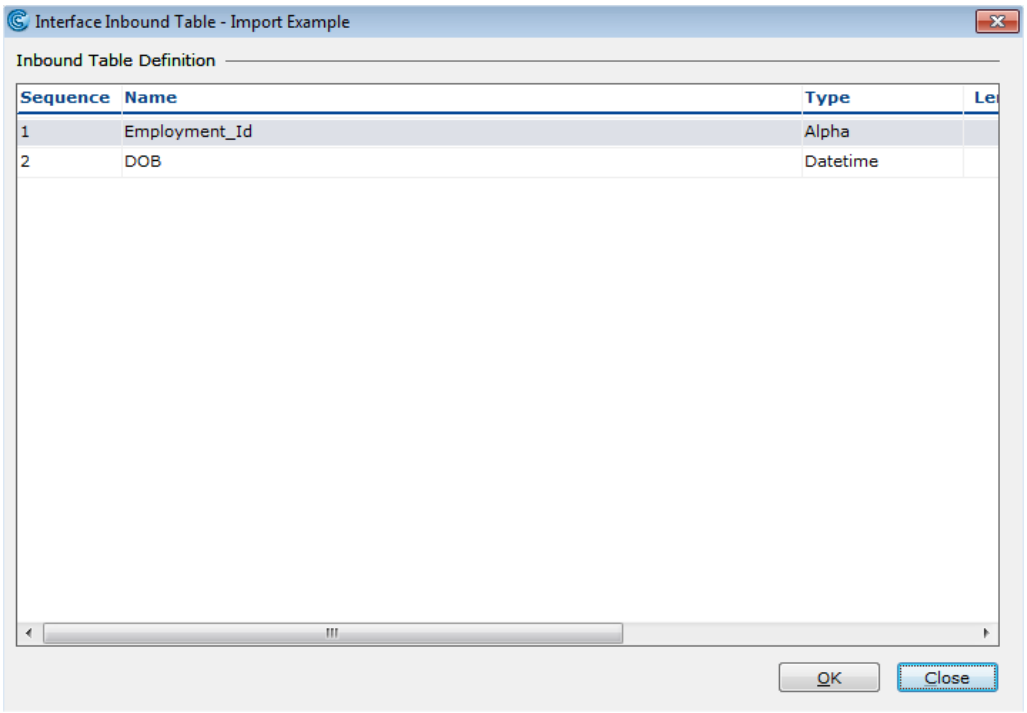
Name	Description
Step Back	Click this to remove the last filter added.
Clear Filter	Click this to clear the filter options.
Acknowledge All	Click this button to acknowledge all the errors in one step instead of acknowledging errors individually. This affects the **traffic lights** in the **Interface Definitions** window.

Interface Inbound Table window (Inbound Table button)

You must create column headers that match those of the incoming file that is imported to the **iQ** database. For more information, see **How do I create column headers for an inbound table?**.

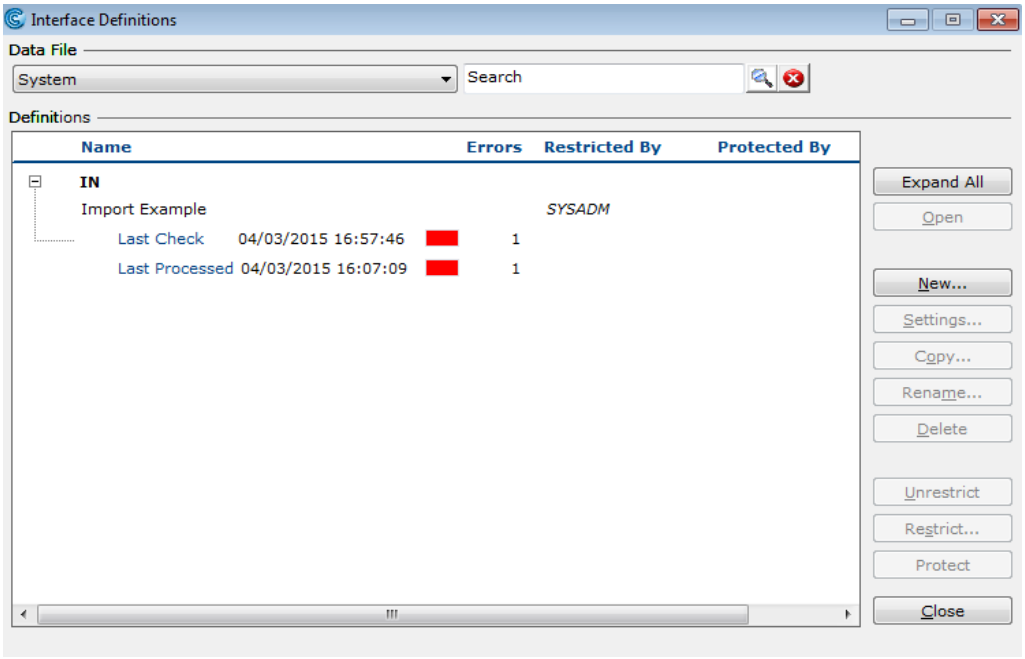
The **Inbound** file's layout is displayed so that you can check to make sure that it contains the correct format and content.

Search path: Tools> Interfaces> New/Settings> Interface Connector window> Direction: IN> Inbound Table button



Note: You cannot parameterise the **(Inbound) Post Stored Procedure**.

Once you have created a definition, it appears in the **Interface Definitions** window.

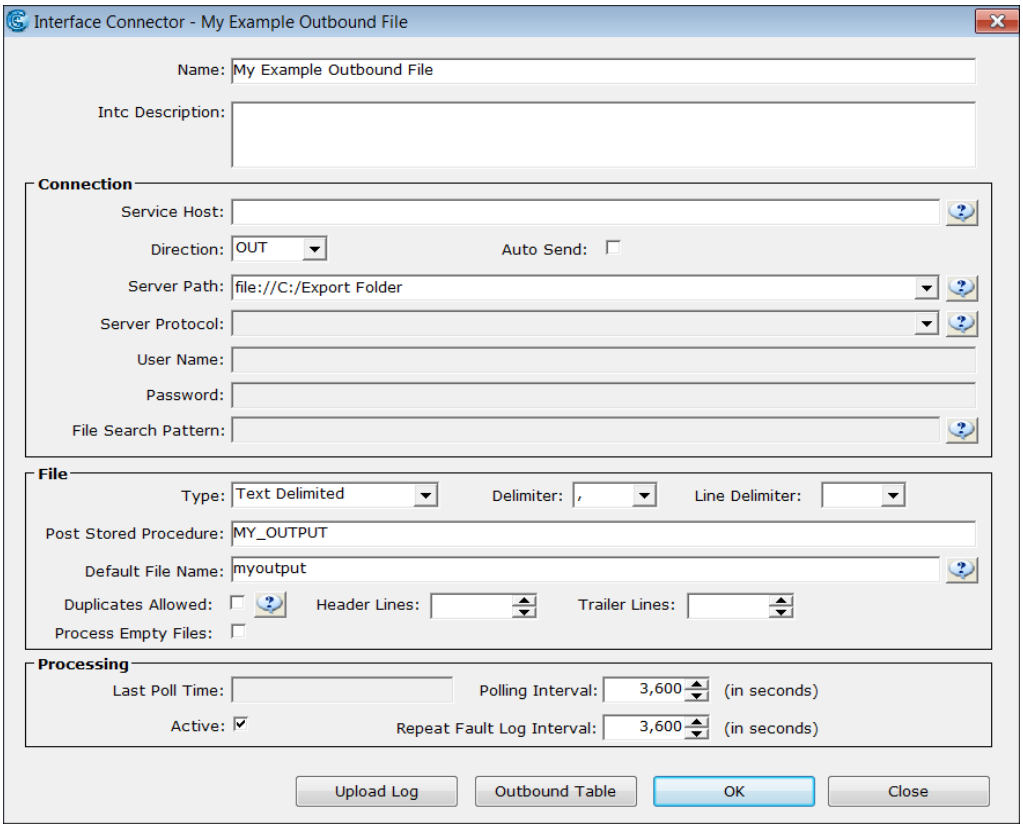


Traffic lights (Inbound)

Name	Description
Last Check	The date and time stamp of when **iQDTS** last checked the third party locations for an **Inbound** file. **Green** = Connection is working. **Red** = Connection is not working. Check the **Download Log** for errors. **Search path:** Settings... button> Interface Connector window> Download Log button> Interface Connector Log window. For more information, see the **Interface Connector Log**.
Last Processed	The date and time stamp of when **iQDTS** last processed an **Inbound** file. **Green** = Processing is working. **Red** = Processing is not working. Check the **File Processing Log** for errors. **Search path:** Open button> Interface History window> File Processing Log button> Interface File Log window. For more information, see the **File Processing Log**.

About the Interface Connector Window (Outbound)

This window contains the settings to export files from the **iQ** database to an external location.



Description

Name	Description
Name:	This name is carried over from the previous entry.
Intc Description:	Enter a brief description of the definition.

Manual Connection

This field must be set to manually connect to **iQDTS**.

Name	Description
Direction:	Select **Out** to **Send Outbound** files.

Automatic Connection

These fields must be set to automatically connect to **iQDTS**.

Name	Description
Service Host:	Leave this field blank unless **iQDTS** needs to run on multiple servers. If so, enter the server name that runs the connection.
Direction:	Select **Out** to **Send Outbound** files.
Auto Send:	Check this to signal that the file is produced and can be transmitted to its destination.
Server Path:	Enter the location path of where you want **iQDTS** to connect to, in order for it to send the desired files.
Server Protocol:	Allows protocol-specific flags to be introduced, space delimited. Colon specified example: Port: ftp://server**:81**/path Currently if **FTP**, **FTPS** or **SFTP**, then this protocol overrides the protocol suggested in the **Server Path**. Example: **ftps:**//server/path **Note**: **GHOST** is not used for Outbound connections.
User Name:	Enter the **ID** name given to you by the owners of the **FTP/SFTP** sites. This, together with the password, accesses the **FTP/SFTP** server.
Password:	Enter your password given to you by the owners of the **FTP/SFTP** sites. This, together with the password, accesses the **FTP/SFTP** server.
File Search Pattern:	NOT USED FOR OUTBOUND FILES.

File

Name	Description
Type:	Select the file type **iQDTS** picks up, e.g. **XML**, **Text Delimited** or **Text Fixed Width**.
Delimiter:	Enter either the delimiter **|**, **:** or **,** to separate text strings. **Note**: This field becomes active when **Text Delimited** is selected as type.
Post Stored Procedure:	Enter the name of the stored procedure, that produces the **Outbound** file in the **iQ** database and then sends it to an external location.
Default File Name:	Enter the default file name to be used when producing a file.
Duplicates Allowed:	Check the **Duplicates allowed** check box to allow **iQDTS** to re-export the files that have duplicate file names.
Header Lines:	Enter values **0** or **1** to set the number of lines within the header. Cannot exceed **1**.
Trailer Lines:	NOT USED FOR OUTBOUND FILES.

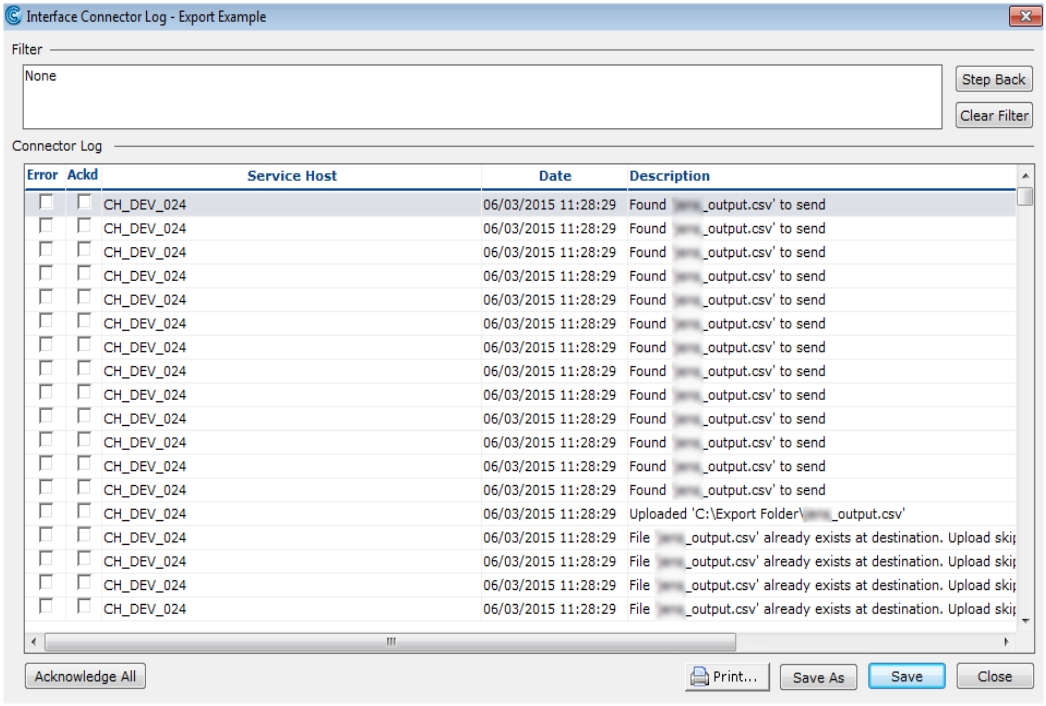
Processing

Name	Description
Last Poll Time	This identifies the last time **iQDTS** checks to see if files are available.
Polling Interval	Set the number of seconds that **iQDTS** waits to search for files at the third party location.
Active	Check the **Active** check box to activate **iQDTS** to look for files.
Repeat Fault Log Interval	Select the number of seconds before an error is redisplayed in the log file.

Interface Connector Log window (Upload Log button)

This window displays any errors and if the errors have been acknowledged. Certain errors require user input to stop them from reoccurring. An error may be a change in user name or password etc.

Search path: Tools> Interfaces> New/Settings> Interface Connector window> Direction: OUT> Upload Log button> Interface Connector Log window



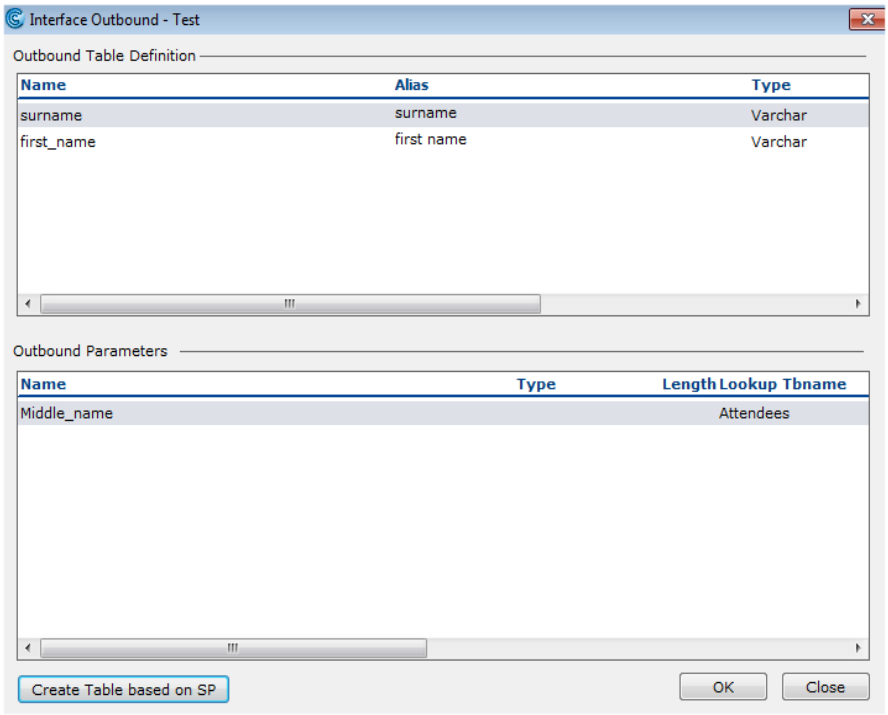
Name	Description
Step Back	Click this button to filter specific errors or date ranges.
Clear Filter	Click this button to clear the filter ranges.
Acknowledge All	Click this button to acknowledge all the errors in one step instead of acknowledging all the errors individually.

Interface Outbound window (Outbound Table button)

You must create column headers within the **Outbound Table Definition** pane, to match those of the file that is uploaded to the third party location. For more information, see **To set up the outbound definition table**.

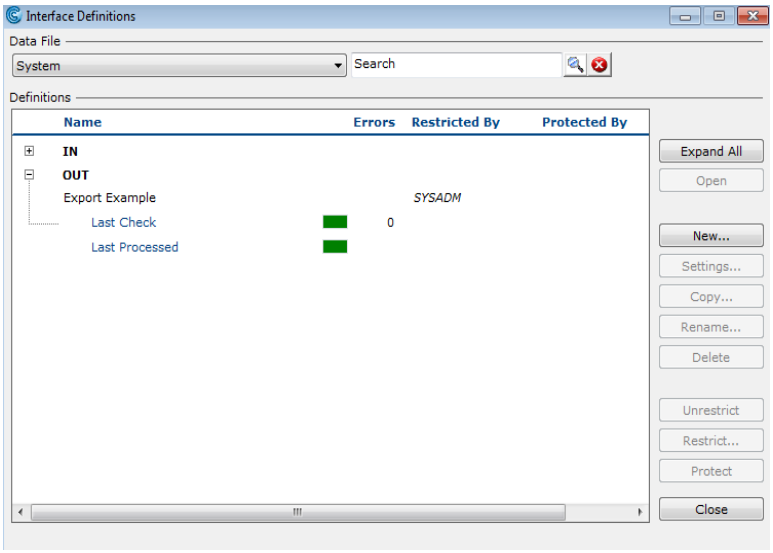
The **Outbound** file's layout is displayed so that you can check to make sure that it contains the correct format and content before it is exported.

Search path: Tools> Interfaces> New/Settings> Interface Connector window> Direction: OUT> Outbound Table button



Name	Description
Outbound Definition Table	Displays the physical columns and headers stated in the **SP**.
Outbound Parameters	Use this section to set up the parameters used by end users.
Create Table based on SP	Click this button to run the **SP**.This creates the column definition for you so that you can edit it, if necessary.

Once you have created a definition, it appears in the **Interface Definitions** window.



Traffic lights (Outbound)

Name	Description
Last Check	The date and time stamp of when **iQDTS** last checked the third party locations for an **Outbound** file. **Green** = Connection is working. **Red** = Connection is not working. Check the **Upload Log** for errors. **Search path:** Settings... button> Interface Connector window> Upload Log button> Interface Connector Log window. For more information, see the **Interface Connector Log**.
Last Processed	The date and time stamp of when **iQDTS** last processed an **Outbound** file. **Green** = Processing is working. **Red** = Processing is not working. Check the **File Processing Log** for errors. **Search path:** Open button> Interface History window> File Processing Log button> Interface File Log window. For more information, see the **File Processing Log**.

IMPORTANT! Once the connection is working, ensure the **Active** check box is checked in the **Interface Connector** window so that the file can be processed.

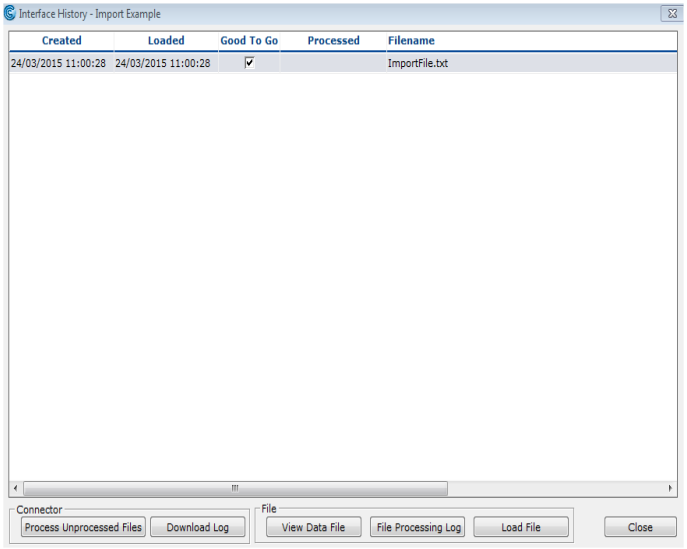
About the Interface History Window

This window shows the history of the files sent to and from third party locations.

Note: When the **Good to Go** column is checked, the file is ready to be transported to the location specified in **Settings**.
Good To Go means that the **Inbound/Outbound** file's data is ready to be sent to the appropriate location, whether it is the **Cintra iQ** database or a third party location. The **Good To Go** check box is automatically checked once the file is successfully loaded into **Cintra iQ** to be processed.

Interface History - Inbound

Search path: Interface Definitions window> IN definition> Open button

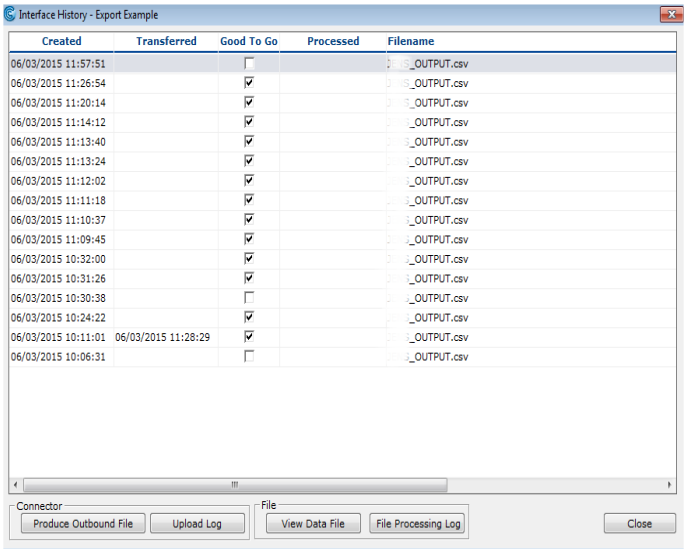


Section	Name	Description
Connector		
	Process Unprocessed Files	Click this button to manually process all unprocessed files.

Section	Name	Description
	Download Log	Click this button to view the **Interface Connector Log** window. For more information, see the **Download Log** .
File		
	View Data File	Click this button to physically display the format of the file. You have the option to save the file or output the file to a different format. **Note:** This window is read-only. For more information, see the **View Data File** example.
	File Processing Log	Click this button to view the file log as an error file. For more information, see the **File Processing Log** example.
	Load File	Click this button to download the file into **Cintra IQ**, from where it is kept.
	Close	Click this button to save the data and close the window.

Interface History - Outbound

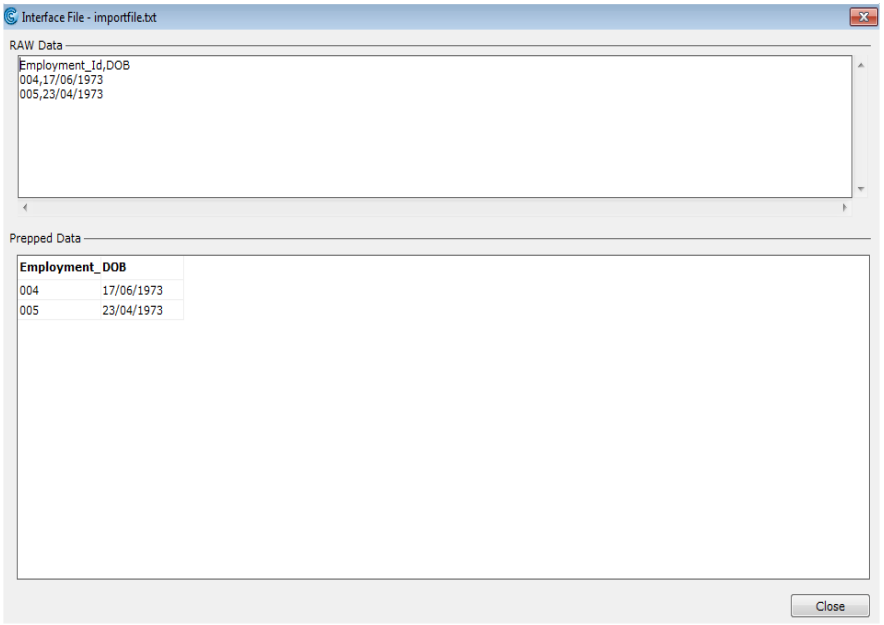
Search path: Interface Definitions window> OUT definition> Open button



Section	Name	Description
Connector		
	Produce Outbound File	Click this button to load the **Outbound** file into **Cintra iQ**. For more information, see the **Produce Outbound File** example.
	Upload Log	Click this button to view the upload information when **iQ** sends the data to a third party location. For more information, see the **Upload Log** example.
File		
	View Data File	Click this button to physically display the format of the file. You have the option to save the file or output the file to a different format. **Note:** This window is read-only. For more information, see the **View Data File** example.
	File Processing Log	Click this button to view the file log as an error file. For more information, see the **File Process Log** example.This example applies to **Outbound** files as well.
	Close	Click this button to save the data and close the window.

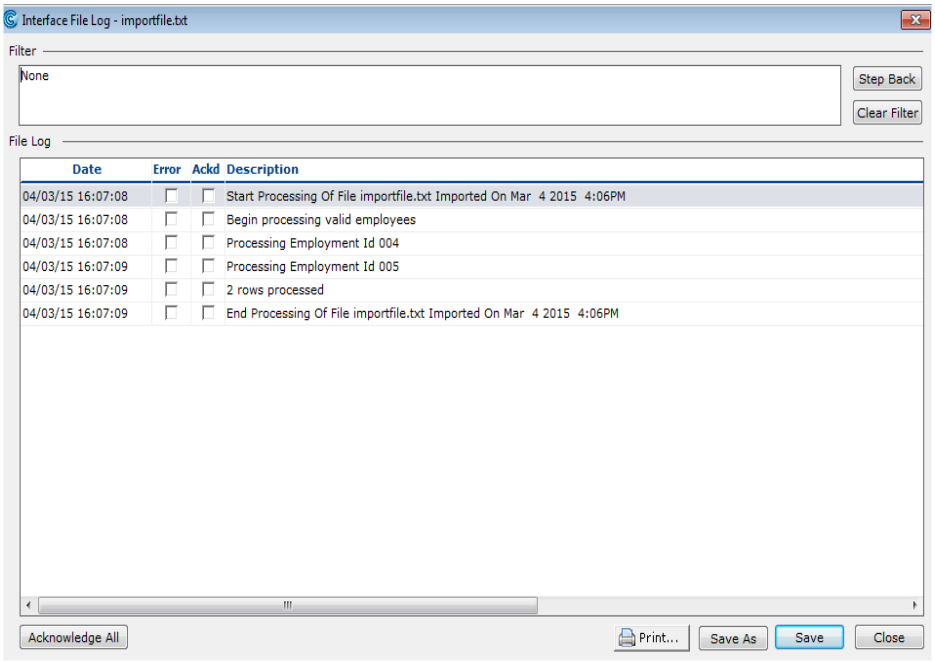
Examples

Interface File window (View Data File button - Inbound)



Name	Description
Raw Data	Unformatted **Inbound** file contents
Prepped Data	Formatted **Inbound** file contents to fit into **SP** table structure
Close	Click this button to save the data and close the window.

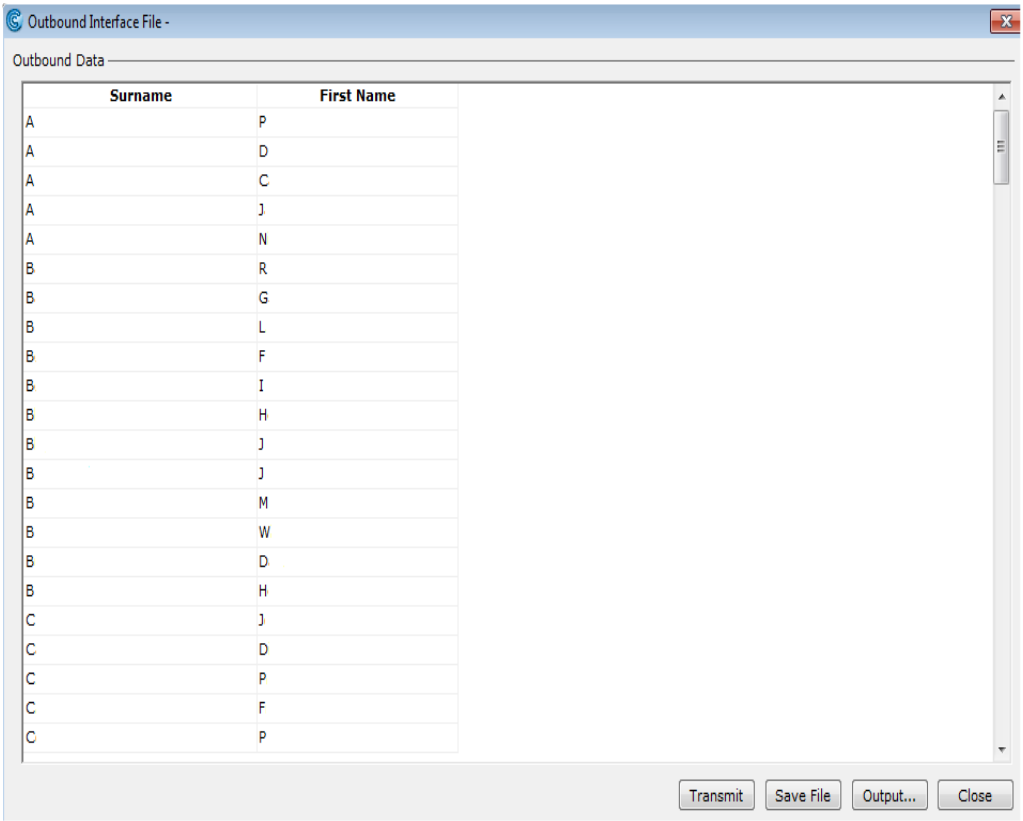
Interface File Log window (File Processing Log button - Inbound)



Name	Description
Step Back	Click this button to filter specific errors or date ranges.
Clear Filter	Click this button to clear the filter options.
Acknowledge All	Click this button to acknowledge all the errors in one step instead of acknowledging all the errors individually. This affects the **Definitions** in the **Interface Definitions** window.
Print	Click this button to print the **Connector log**.
Save as	Click this button to save the **Connector log** as a file type.
Save	Click this button to save the **Connector log** within the system.
Close	Click this button to close the window.

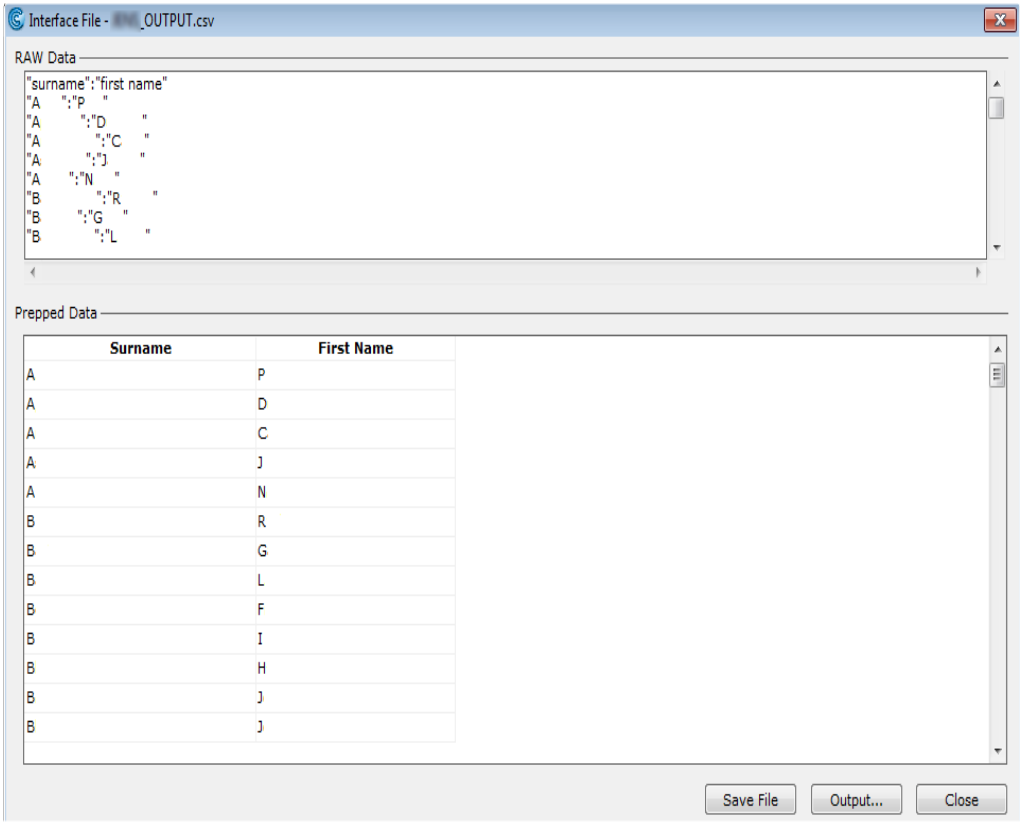
Outbound Interface File window (Produce Outbound File button)

This window displays the read-only view of the **Outbound** file's data.



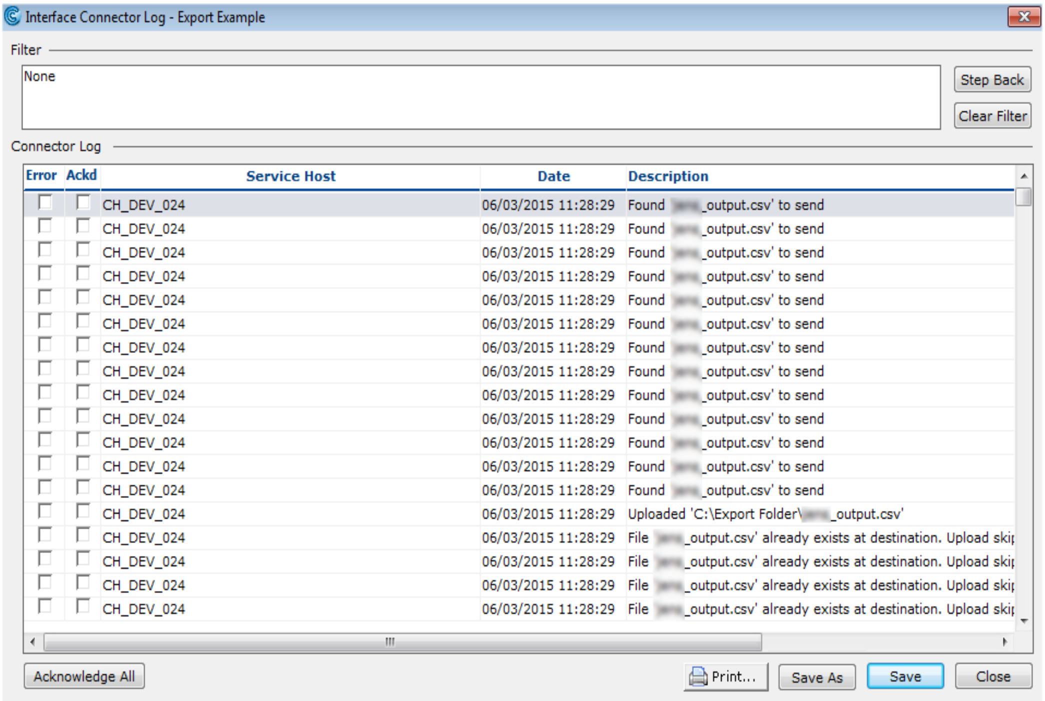
Name	Description
Transmit	Click this button to send the file through **iQDTS**.
Save File	Click this button to save the file to the **Import** folder on your local drive.
Output...	Click this button to save the file to various outputs such as **Microsoft Excel, Word, Mail Merge**, disk or to your application.
Close	Click this button to close the window.

Interface File window (View Data File button - Outbound)



Name	Description
Save File	Click this button to save the file to the **Export** folder on your local drive.
Output...	Click this button to save the file to various outputs such as **Microsoft Excel**, **Word**, **Mail Merge**, disk or to your application.
Close	Click this button to close the window.

Interface File Log window (File Processing Log button - Outbound)



Name	Description
Acknowledge All	Click this button to acknowledge all the errors in one step instead of acknowledging all the errors individually.
Print	Click this button to print the **Connector log**.
Save as	Click this button to save the **Connector log** as a file type.
Save	Click this button to save the data file.
Close	Click this button to close the window.

Inbound File FAQ

How do I create a new Inbound definition?

When an **Inbound** file is received, it is stored in the **iQ** database by either an automatic or manual process.

You must perform the following:

1. **Create the Inbound Stored Procedure.**
2. **Enter the file, connection and processing settings.**
3. **Create the Inbound Table definition.**
4. **Set the definition as Active.**
5. **Load the inbound file**.

To create an inbound stored procedure

An **Interfaces** definition within the **Interface Management** module must have a **Store Procedure (SP)** attached to it before it can automatically or manually retrieve and/or send a data file to a third party location. Therefore, you must create the **SP** in **SQL** and follow the structure which is outlined in the standard **Inbound/Outbound** templates.

Seach path: Your database

1. From your database, navigate to the standard store procedure template: `[SYSADM].[CUSTOM_INTF_IN_TEMPLATE](@pkINTC int)` in your database.
2. Follow the structure which is outlined in the **Inbound** template.

To enter the inbound settings

Search path: Tools> Interfaces> Interface Definitions window

1. Navigate to the **Interface Definitions** window.
2. Select **New...**. The **Interface Connector** window appears.
3. Enter the **Interface Name**.
4. Click **OK**. The **Interface Connector** window appears.
5. Enter the definition's description.
6. Enter either the **manual** or **automatic** **Connection** details.
7. Select a file **Type**.
8. Enter a **Delimiter**, if necessary.
9. Enter the **Post Stored Procedure**.
10. Fill in the rest of the form, **if necessary**.

> **IMPORTANT!** Remember to set the definition as **Active** if you are setting up the automatic process.

To create an inbound table definition

You must create column headers within the **Inbound Table Definition** window which match those of the **Inbound** file that is held in a temporary table within **Cintra iQ**.

Search path: Tools> Interfaces> New/Settings> Interface Connector window> Direction: IN> Inbound Table button> Inbound Table definition window

creating column headers

1. Navigate to the **Inbound Table Definition** window.
2. Right-click in the **Inbound Table** definition pane. A menu appears.
3. Select either **Insert at End** or **Insert Here**. The **Inbound Table Column** window appears.
4. Enter the column information, where applicable.

Name	Description
Name	Enter the name of the column header. This text is what is displayed to the end user.
Type	Select the header's data type.
Date Format	Select the desired date format.
Length/Precision	Enter the length of **Type** you have selected.

5. Click **OK**. The columns that match those in the external file appear in the table.

> **IMPORTANT!** The columns must match those of the **Inbound** file, otherwise **iQ Interface** will reject it.

To set the inbound definition as Active

Search path: Tools> Interfaces> Interface Definitions window> Settings...> Interface

1. Check the **Active** check box.
2. Click **OK**. The definition appears in the **Interface Definitions** window.

To load and process the inbound file

You can load the inbound file by the following methods:

- **Automatically**

  iQDTS loads the file automatically. For more information, see **iQ Data Transport Service**.

  Once the files are retained in a temporary table within the **Cintra iQ** database, the data needs to be distributed according to the **Inbound Stored Procedure**. For more information, see the current inbound **SP** `[SYSADM].[CUSTOM_INTF_IN_TEMPLATE](@pkINTC int)` template in your database.

  1. Navigate to the **Interface Definitions** window.
  2. Select the desired **Inbound Definition.**
  3. Click the **Open** button. The **Interface History** window appears.
  4. Click the **Process Unprocessed Files** button. The data is processed according to the **Inbound SP**.
  5. Continue to view the data file, processing log or download log

- **Manually**

  1. Navigate to the **Interface Definitions** window.
  2. Select the desired **Inbound Definition.**
  3. Click the **Open** button. The **Interface History** window appears.
  4. Click the **Load File** button. The **Select file to load** window appears.
  5. Search for and select the desired data file.
  6. Click the **Open** button. The file is loaded into the **Interface History** window.
  7. Click the **Process Unprocessed Files** button. The data is processed according to the **Inbound SP**.
  8. Continue to view the data file, processing log or download log.

Outbound File FAQ

How do I create a new Outbound definition?

You must perform the following:

1. **Create the Outbound Stored Procedure.**
2. **Enter the file, connection and processing settings**.
3. **Set up the Outbound Table definition**.
4. **Set the definition as Active**.
5. **Produce an outbound file**.

To create an outbound stored procedure

An **Interfaces** definition within the **Interface Management** module must have a **Store Procedure (SP)** attached to it before it can automatically or manually retrieve and/or send a data file to a third party location. Therefore, you must create the **SP** in **SQL** and follow the structure which is outlined in the standard **Inbound/Outbound** templates.

Seach path: Your database

1. From your database, navigate to the standard store procedure template: `[SYSADM].[CUSTOM_INTF_OUT_TEMPLATE]` in your database.
2. Follow the structure which is outlined in the **Outbound** template.

To enter the outbound file settings

Search path: Tools> Interfaces> Interface Definitions window

1. Navigate to the **Interface Definitions** window.
2. Select **New...**. The **Interface Connector** window appears.
3. Enter the **Interface Name**.
4. Click **OK**. The **Interface Connector** window appears.
5. Enter the definition's description.
6. Enter either the **manual** or **automatic** **Connection** details.
7. Select a file **Type**.
8. Enter a **Delimiter**, if necessary.
9. Enter the **Post Stored Procedure**.
10. Fill in the rest of the form, **if necessary**.

> **IMPORTANT!** Remember to set the definition as **Active**, if you are setting up an automatic process.

To set up the outbound definition table

You must create column headers within the **Outbound Table Definition** window, to match those of the **Outbound** file that will be uploaded to a third party location.

You can also create parameters to restrict the data search even further.

creating column headers

Search path: Tools> Interfaces> New/Settings> Interface Connector window> Direction: OUT> Outbound Table button> Interface Outbound window

1. Navigate to the **Interface Connector** window.
2. Click the **Outbound Table** button. The **Interface Outbound** window appears.
3. Click the **Create Table based on SP** button to create the column definition.

   Note: These column definitions can be edited, if necessary.

4. Right-click in the **Outbound Table Definition** pane. A menu appears.
5. Select either **Insert at End** or **Insert Here**. The **Outbound Table Column** window appears.
6. Enter the column information, where applicable.

Name	Description
Name	Enter the name of the column header. This text is what is displayed to the end user.
Type	Select the header's data type.
Dare Format	Select the desired date format.
Length/Precision	Enter the length of **Type** you have selected.

7. Click **OK**. The columns that match those in the external file appear in the table.

   IMPORTANT! The columns must match those of the **Outbound** file, otherwise, **iQ Interface** will reject it.

creating parameters

Search path: Tools> Interfaces> New/Settings> Interface Connector window> Direction: OUT> Outbound Table button> Interface Outbound...window

1. Navigate to the **Interface Outbound...** window.
2. Right-click in the **Outbound Parameters** pane. A menu appears.
3. Select either **Insert at End** or **Insert Here**. The **Outbound Parameters** window appears.
4. Enter the parameter information, where applicable.

Name	Description
Name	Enter the name of the parameter. This text is what is displayed to the end user.
Lookup Tbname	Enter the **Tbname** if the parameter is to appear in the iQ data drop down list.
Restricted by	From a list of previously selected parameters, select a parameter to further filter the **iQ** data.
Type	Select the parameter's data type.
Length	Enter the length of **Type** you have selected.

5. Click **OK**. The parameters that filter the **Outbound** file appear in the table.

To set the outbound definition as Active

Search path: Tools> Interfaces> Interface Definitions window

1. Check the **Active** check box.
2. Click **OK**. The definition appears in the **Interface Definitions** window.

To produce an outbound file

Search path: Interface Definitions window> IN definition> Open button> Interface History window

1. Navigate to the **Interface History** window.
2. Click **Produce Outbound File**. The **Outbound Interface Parameters** wizard appears.
3. Select the desired parameter(s).
4. Click the **Run** button. The **Outbound Interface File** window appears.
5. **Save** or **Transmit** the file to the desired location.

CHAPTER 4

More Information

This chapter explains the changes made in particular database versions, that are independent of the **v29** release.

This chapter explains the following:

Emails

How do I transport emails?

If you wish to transport emails via **iQDTS**, you need to specify where the **Email Queue** is pointing to in **Cintra iQ** and ensure the **Queue** is active. You must also set the email value in the **IQDTS.exe.config** file.

Search path: System Administration> Manage Email Settings

> **Note:** If the queue is not active, **iQDTS** ignores all the emails that are contained in that queue.

iQDTS v1.0.1.0

iQDTS now uses .**NET 4.0.**

Data Connection String

The **iQDTS** data connection string is now separated from the **IQDTS.exe.config** file and is contained in the **dbConnection.config** file, which is held in the same **1.0.1.0** folder in **G:\IQDTS**. This is to avoid upgrade issues.

Config File

Whilst the majority of the configuration is from the iQ database, there is a small amount of configuration via the **IQDTS.exe.config** and **dbConnection.config** files.

<appSettings>

<add key="RefreshIntervalSeconds" value="10"/>

<add key="IntfActive" value="true"/>

<add key="SmtpActive" value="true"/>

</appSettings>

<connectionStrings configSource="dbConnection.config" />

dbConnection.config:

<connectionStrings>

<clear/>

<add name="db1" connectionString="Data Source=SERVER\INSTANCE;Initial Catalog=DATABASENAME;Integrated Security=True" providerName="System.Data.SqlClient"/>

</connectionStrings>

Now, when a user does not have permission to install **iQDTS**, as a service, it will not use an **Event log** when running in interactive mode.

General

You can now down load an external file into the **iQ** database using **Cintra iQ Interface** module without the need to run **iQDTS** at the same time.

By default, **PASV** mode is used. To allow other protocols, use **FTP_USE_PORT, FTP_USE_EPSV** and **FTP_USE_EPRT**.

In testing it came to light that some **FTP** servers cannot delete using full path and instead need **CWD** to the directory then **DELE** the file. **FTP_DELETE_ABS** for the former and **FTP_DELETE_REL** for the latter. **FTP_DELETE_ABS** is the default.