Intelec Report Access
User Guide

Version 1.0.0

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Revision History

Date	Version	Author/Editor	Comments
Aug 2005	V 1.0.0	Ranura Athukorala	Draft document
Oct 2006	V 1.0.1	Ranura Athukorala	Deleted details regarding the single web reports generation request.
Oct 2006	V 1.0.2	Ranura Athukorala	Add Intelec Configuration Information.

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1.0 Introduction

Intelec Report Access would allow to send your reports generated in Intelec to a web server so that your clients can access the reports on-line. The iSeries reports would be converted to PDF and HTML format and sent to the web server.

This user guide provides detailed instructions on setting up and operating Intelec Report Access. Intelec Report Access is available with version 8.0 or later of Intelec.

Please follow the steps carefully when you set up the Intelec Report Access. For the report server to function properly the components have to be setup in both the Web server and the iSeries.

2.0 Prerequisites for Intelec Report Access

1. Install Microsoft Windows Server 2003 Standard Edition on the web server. Please make sure that you have downloaded and installed latest patches and fixes by going to the Microsoft update website.

2. Microsoft Internet Information Services (IIS) manager – Version 5.1 or later should also be installed on the web server. This comes with Windows Server 2003 standard edition.

3. The Intelec Report Access Manager and the Intelec Report Access Server will be sent to you with the install instructions. These are Windows install programs.

3.0 Creating a web site

If you already have a web site and host your own web server then you should create a virtual directory (skip this step and go to the following step – Creating a virtual directory). If not, you should create a web site. Instructions are given below. It is advisable that this step is carried out by the person who is responsible for maintaining your web server.

1. Create a web site in the IIS Manager.

  i. Goto Start - > All Programs -> Administrative Tools ->Internet Information Services (IIS) Manager.
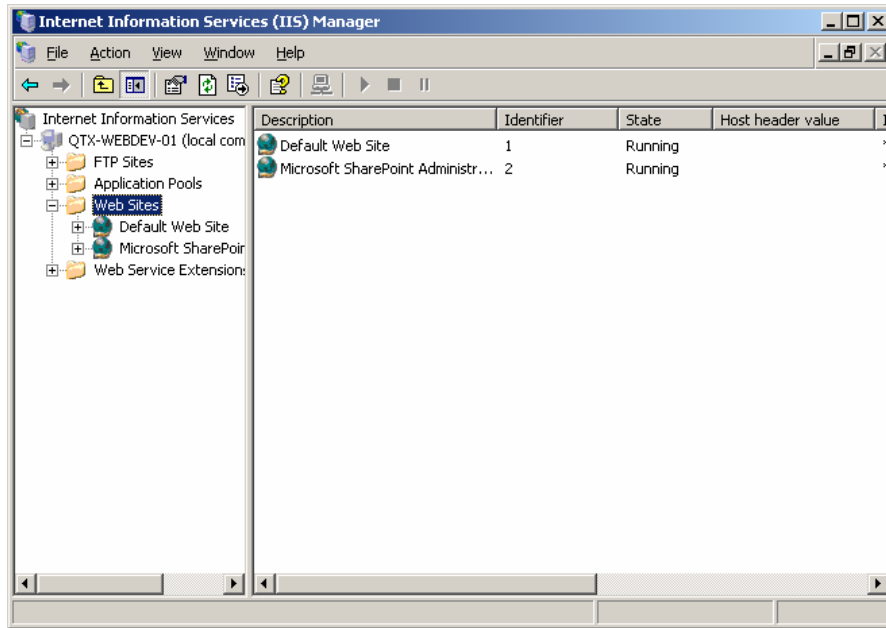 ii. Expand the node for the local computer and Right click the Web Sites folder.

Figure 1 - Internet Information Services Setup

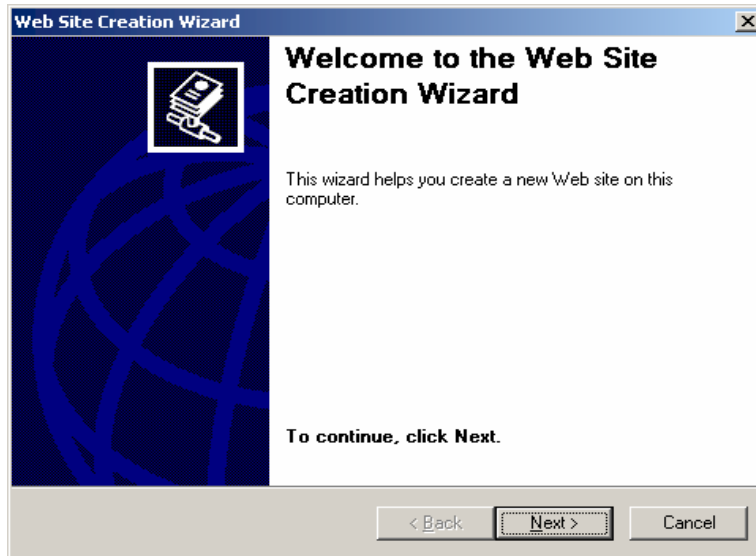iii.   Select New ->Web Site…

You should get the following screen.

Figure 2 – Welcome to Web Site Creation Wizard

iv.   Click Next. You will be prompted to enter a Web site Description.

Enter *Intelec Report Access* in the text box.

v.   You will be prompted for the IP address and Port Settings screen. Leave the default values and press Next.

vi.   You will be prompted for a Web Site home directory. Select Browse.
Go to **C:\Inetpub\wwwroot** directory. (This is the default directory created by IIS if you do not change the directory. It is recommended that you do not change the name of the directory when IIS being installed.)

vi..   Create a new directory under C:\Inetpub\wwwroot folder. Press "Make New Folder" button and Enter *IntelecReportAccess* as the name of the folder. (It is recommended that you do not leave spaces between directory names.)

vii.   After you create directory "Web site home directory" prompt should be as follows. Make sure that you have marked the "Allow anonymous access to this web site" check box.
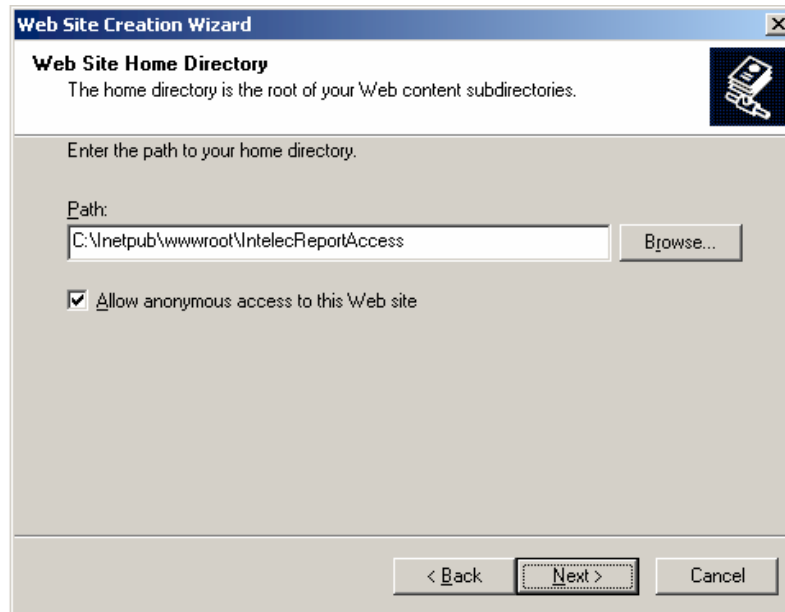

Figure 3 - Setup home directory

viii.   Click Next . You will be prompted with "Web Site Access Permissions". Leave the defaults and click Next. You should get the following screen indicating that "Web Site Creation wizard has been completed successfully."
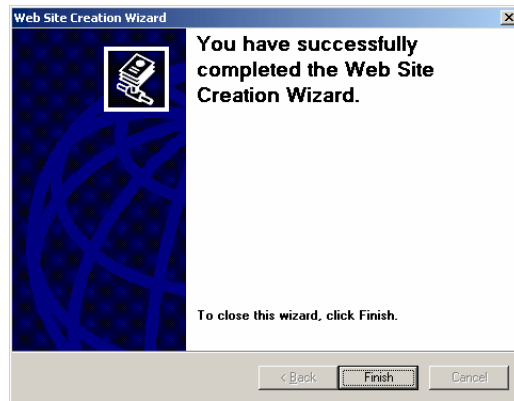
Figure 4 - Web Site Setup Complete

ix.   Under web sites, *Intelec Report Access* directory will be displayed.

4.0 Creating a virtual directory

If you have already created a web site(previous step) you can skip this step. Follow this step only if you already have a web site created in your web server for your company.

1. In the "Intelec Report Access" folder, you will find the *Intelec Report Access Server* folder and *Intelec report access web* folder.

2. Go into Intelec report access web folder and double click on Setup.exe.

3. Click Next from initial screen. In "Select Installation Address" prompt, leave the defaults as they are and click Next.

4. You will be prompted to confirm installation. Click Next.

5. The installation will continue. Click close once you are prompted with Installation complete message. The "Intelec Report Access Web" should now be installed on your computer.

6. Next you will need to install the Intelec Report Access Server on your computer. You will find the install program in the *Intelec Report Access Server* folder.

7. Double click on Setup.exe to start the installation.

8. At the welcome screen click Next.

9. Leave the default values in the Installation Folder prompt. However make sure that "Everyone" is selected on the option below this.

10. Click Next. You will be prompted to confirm the installation. Click Next again.

11. The Intelec Report Access Server is now installed on your computer and a shortcut has been added to your desktop for the "***Intelec Report Access Manager".*** The next step in the process will be configuring the "Intelec Report Access Manager"

5.0 Configuring *Intelec Report Access* Server

1. Open Intelec Report Access Manger by: either clicking on the icon labeled "Intelec Report Access Manger" on your desktop, or going to Start - > All Programs -> Intelec Report Access Manager.
2. For this next step you will need to know the serial number for you AS400. To find the serial number, Start an AS400 session, from a command line type "DSPSYSVAL QSRLNBR".

3 . Once you have you have the serial number, enter it into the field labeled "Enter Serial Numbers of ISeries that are allowed to access this server", Then:

Click the "**Plus Sign"** ➕ button…
Click the "**Apply**" button…
And then click the "**Start Server**" button.

Note: The directory paths listed on the tab should not be changed!
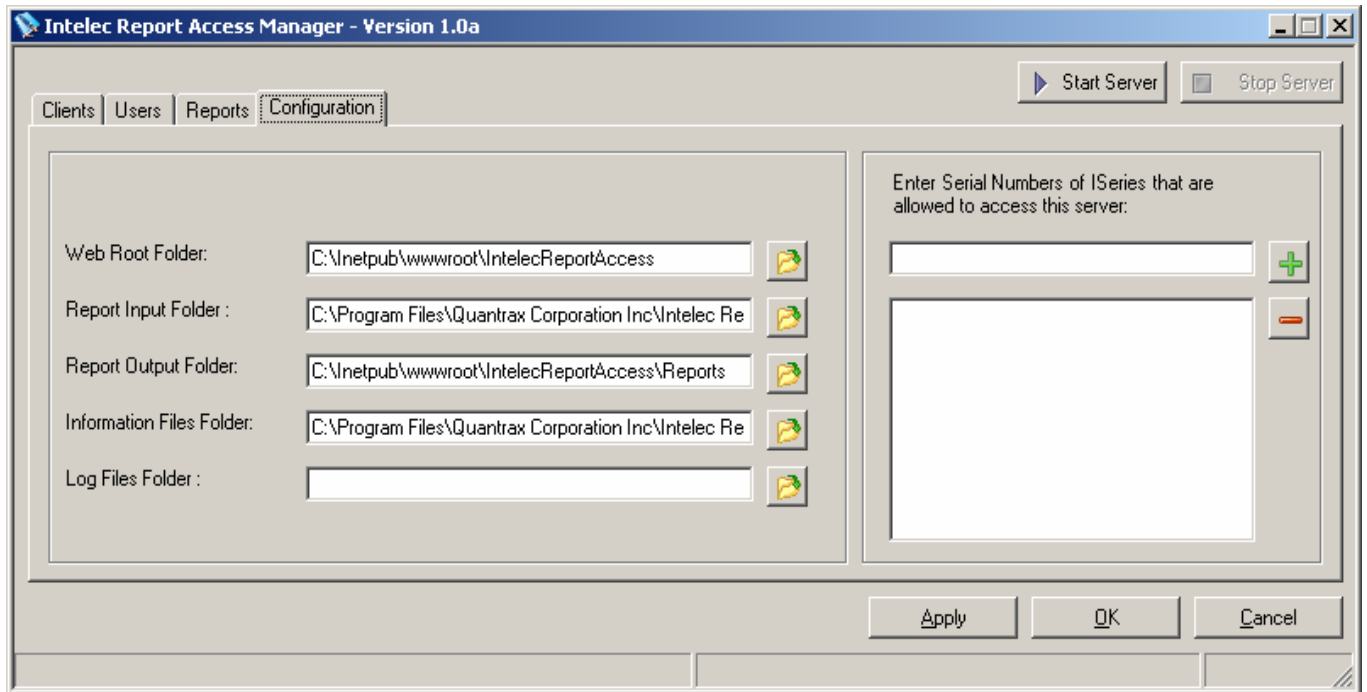

Figure 5 - Intelec Report Access Manager Configuration Tab

6. Once you have requested reports for any client (when using this feature), that client will be automatically added to a list of clients in the report server on the "Clients" tab. You will see a list of clients in the "Existing Clients" section on the following screen.
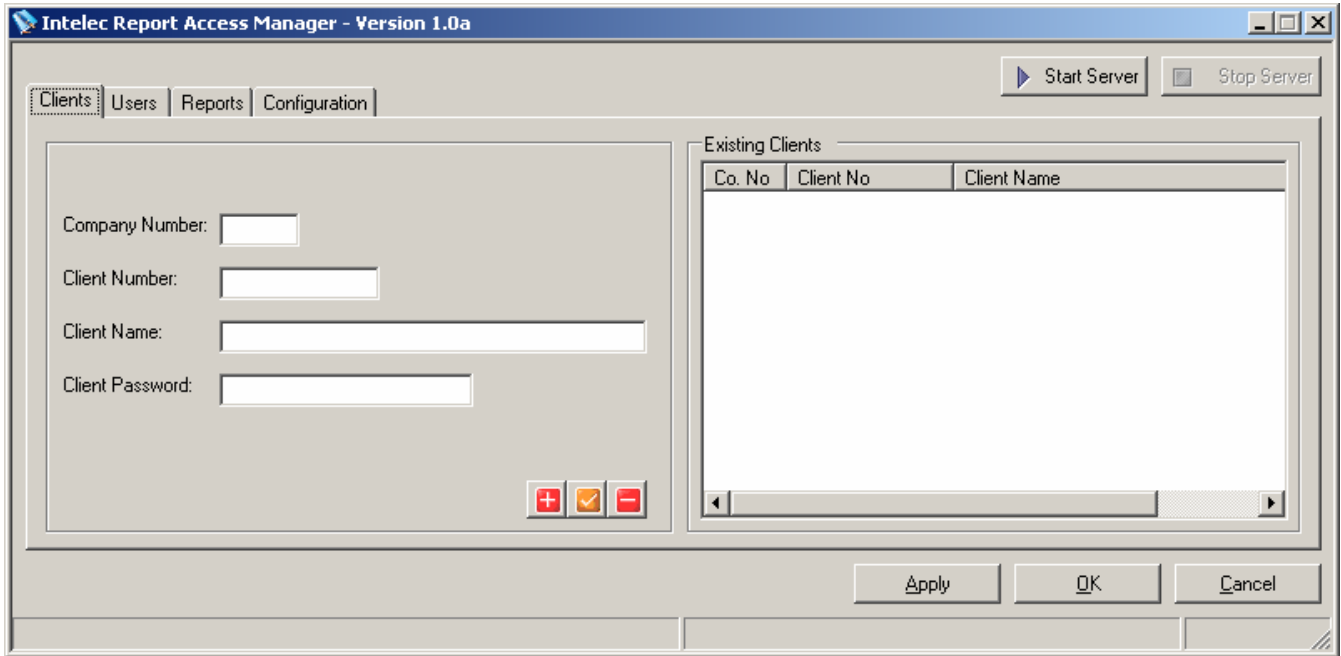

Figure 6 - Intelec Report Access Manager Clients Tab

Note: You can edit the client information using this screen. Client Password field should be entered only if the clients require that reports in PDF format to be encrypted and password protected.

➕	Add clients to the report server. You must click the update button to update client information.
✅	Update client information. You must click this button after editing client information or adding a new client. If you do not do so the changes would not take affect.
➖	Delete client information. Deletes a client record from the report server. If new reports are requested for this client through Intelec the client would be added again.

7. Next click on the "Users" tab to setup the users who are allowed to access the reports. You will have to fill in all the fields except for the email field, (this is not enabled in the current version).

Note: *User Name is company specific*. If you need to give a client access to more then one company's reports, they will need a different user name for each company.

This option will also allow you to add, edit or remove user information. You will not be allowed to add a User to a non existing client.
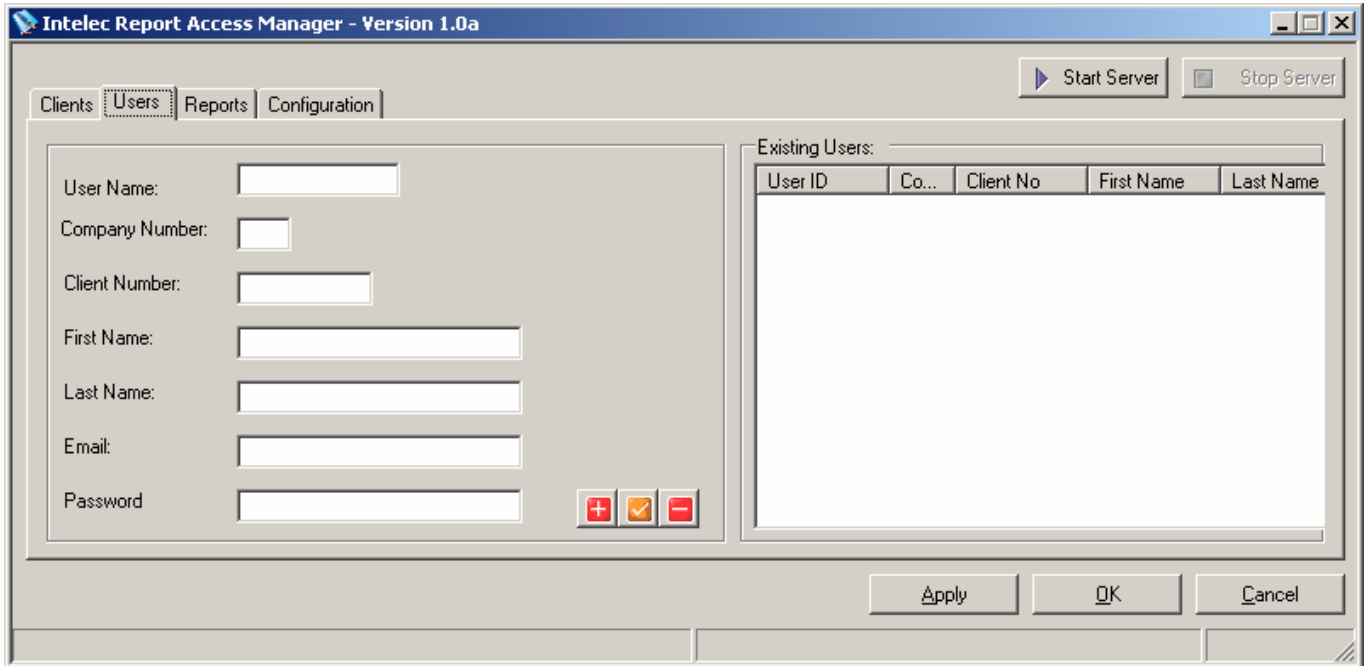

Figure 7 - Intelec Report Access Manager Users Tab

Add Users to the report server. You must click the update button to update user's information.

Update User information. You must click this button after editing user information or adding a new user. If you do not do so the changes would not take affect.

Delete user information. Deletes a user record from the report server.

8. Reports Tab – This option will allow you to restrict what reports a user can review AFTER you have run the option from the reports menu to post it on the web. If you decide after running a report, that you do not want a client to see it… here is where you withhold it. Once you fill in the "Company No", the "Client No." and click the "Search" icon (The magnifying glass), you will be presented with a list of reports that are waiting for the client to review.

Note: To with hold/restrict a report, remove the check mark next to the report and click the "Lock" icon.
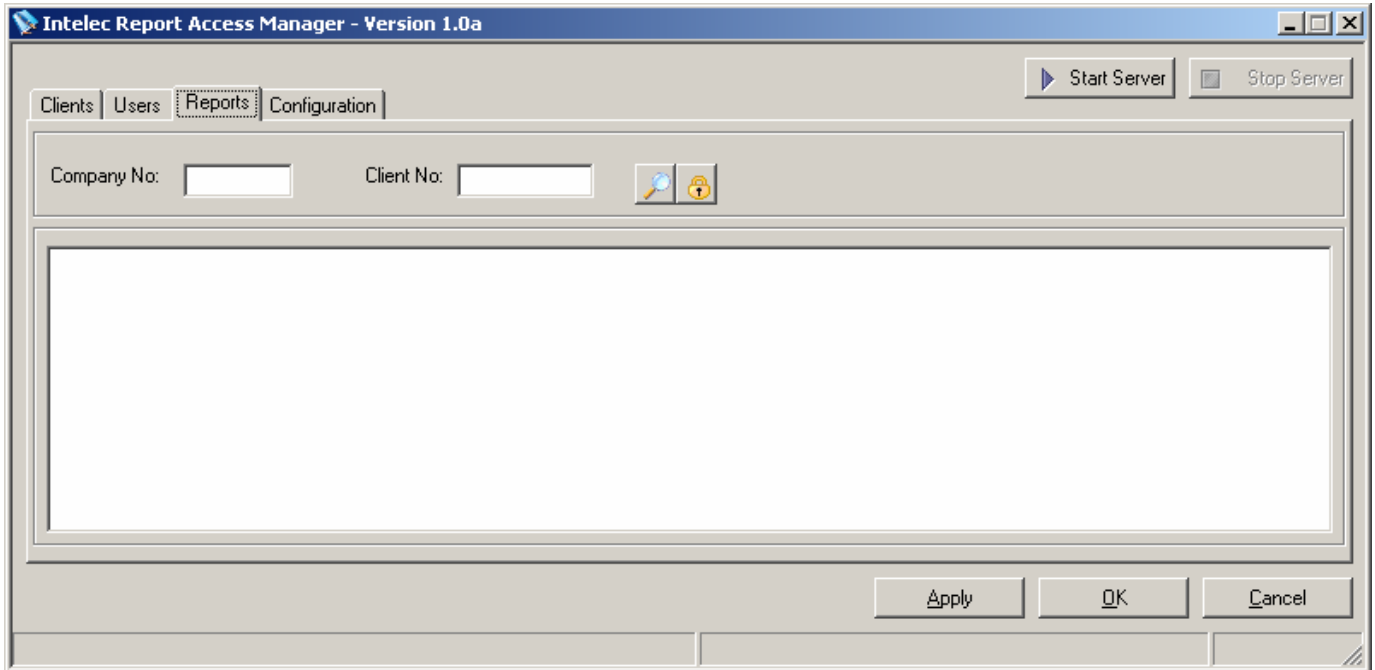

Figure 8 - Intelec Report Access Manager Reports Tab

	Search Button. Enter company number and client number and click this button to search for reports that belong to this company and client.
	Lock/Update Button. Update report status. You can select/deselect the reports that you do not want the clients to see and click this button. This will update the status of the report. If you deselected the reports that report will not be shown to the clients.

9. In Microsoft **Windows 2003 Server** following step need to be performed.

a. Goto the folder where Intelec Report Access was installed. If you choose defaults this would be "C:\Inetpub\wwwroot\IntelecReportAccess"

ii. Right click on the the **Database** folder and select properties.

iii. Goto the security Tab.

iv. Under the heading "Group or user Name" highlight the listing for "IIS_WPG (*server name)*". Once highlighted go to the "Permissions for IIS_WPG and look for the field "Full Control", and select "allow" check box..
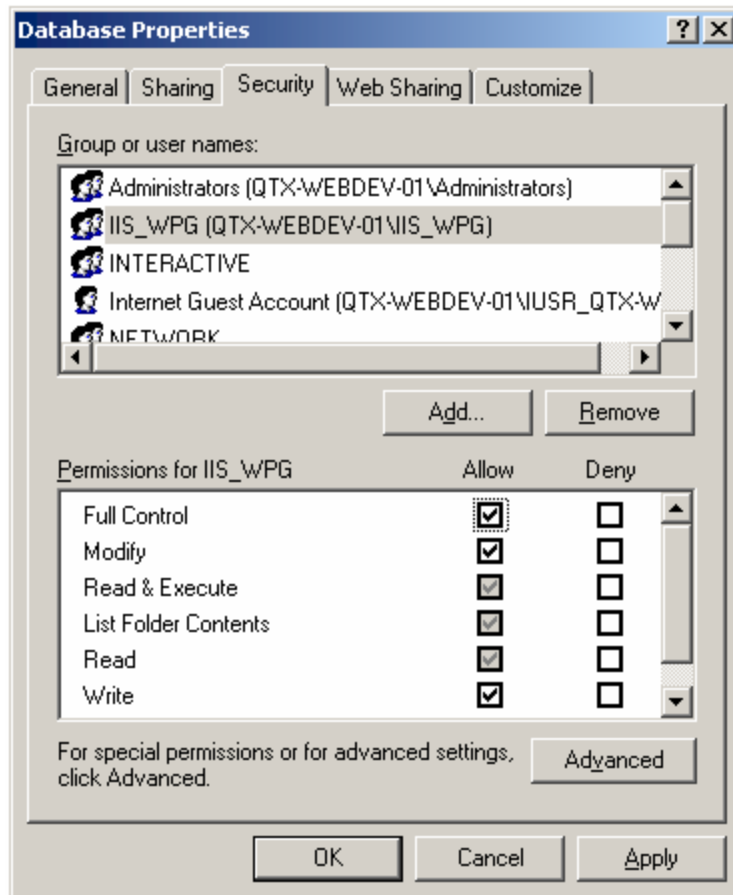

Figure 9 - Setting Security for Web Site

The report server and the web site are now successfully installed.

6.0 Configuring Intelec for Report Access Server

1. When reports are generated from Intelec they will be temporarily saved as Stream files. Therefore you will need to create a Directory on the iSeries.

2. To Create a Directory on the iSeries use the MKDIR command.

3. For example to create a directory named spltopdf command is MKDIR DIR('\spltopdf').

If a directory with this name does not already exits it is recommended to use this directory name.

4. To configure the Report server on the iSeries call the WRCFGUPD program from command line. (This program will be added as an option to Intelec at a later stage and a separate iSeries command will be provided.)
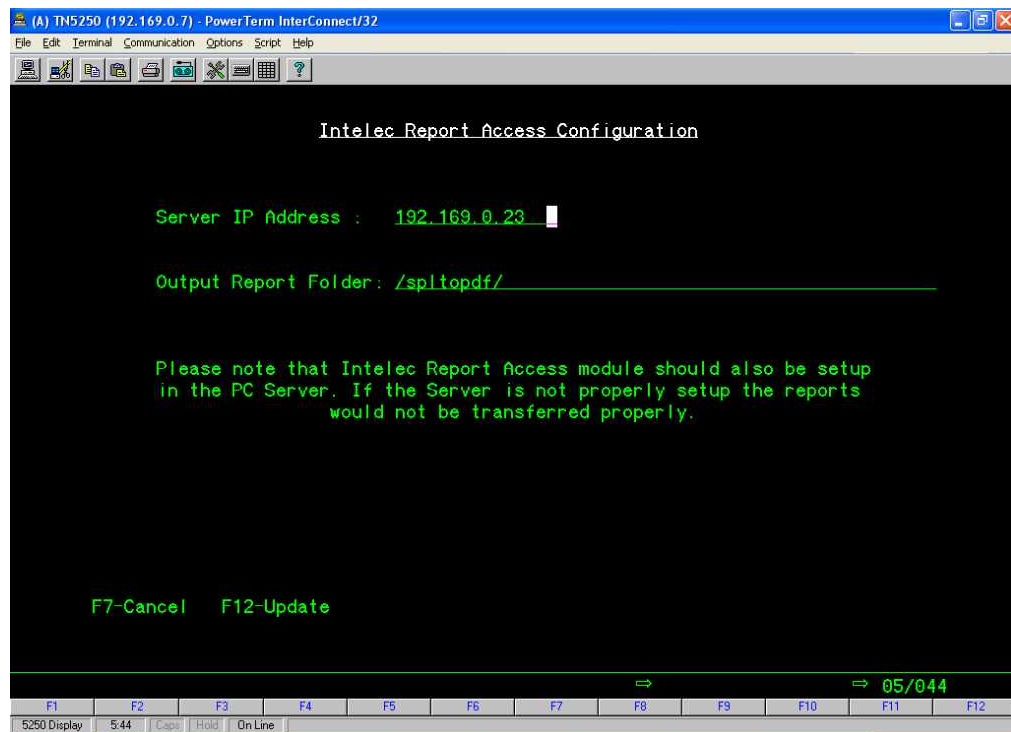

Figure 10 - Setting Up Intelec Report Access on the iSeries

5. Server IP Address should be the IP address of the Web Server that the Report Server programs are installed in.

6. Output Report Folder is the name of the folder that was created in Step 3.

7.0 Configuring Intelec to Send Reports to the Web

1. Options to Send reports to the web is setup in Intelec Client Update.
2. To send Reports "The Emailing Options (Y) _" field should be setup as a Y and to Send Reports to Web option should also setup as (Y).
3. Press Enter to go to the Emailing options screen.
4. Select a report that should be sent to Web.(Put a 1 in the Select field and Press Enter.)
5. If a particular report is to be sent to web that should be setup with a special email address of archive@rserver.com.

6. Conversion type should be 6-PDF.

7. Follow the above steps for each report that you want to be sent to web.

8. Please note that when a report is setup to send to web, it is not emailed even if Keysmail is installed.
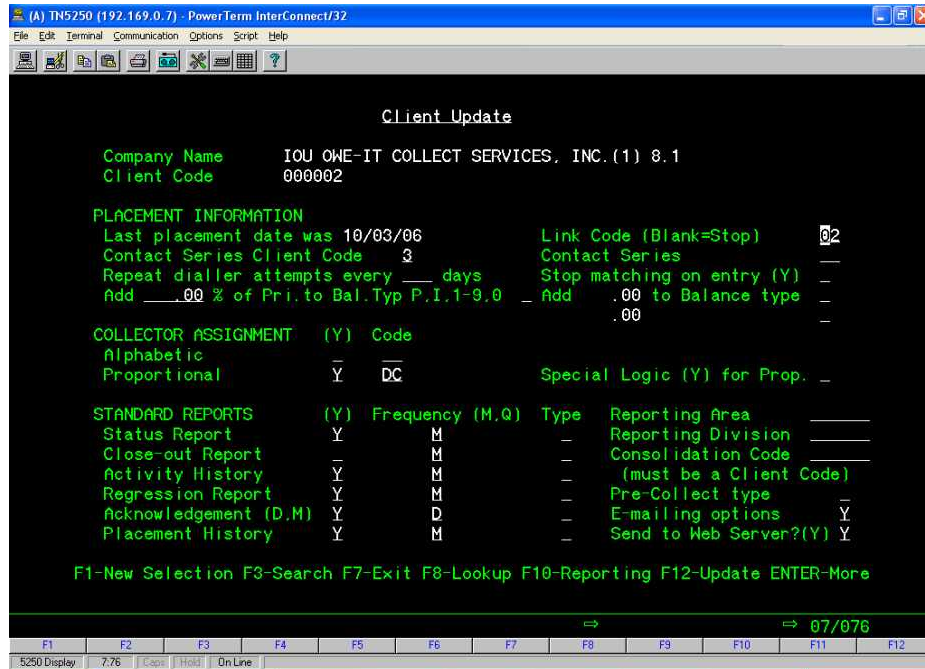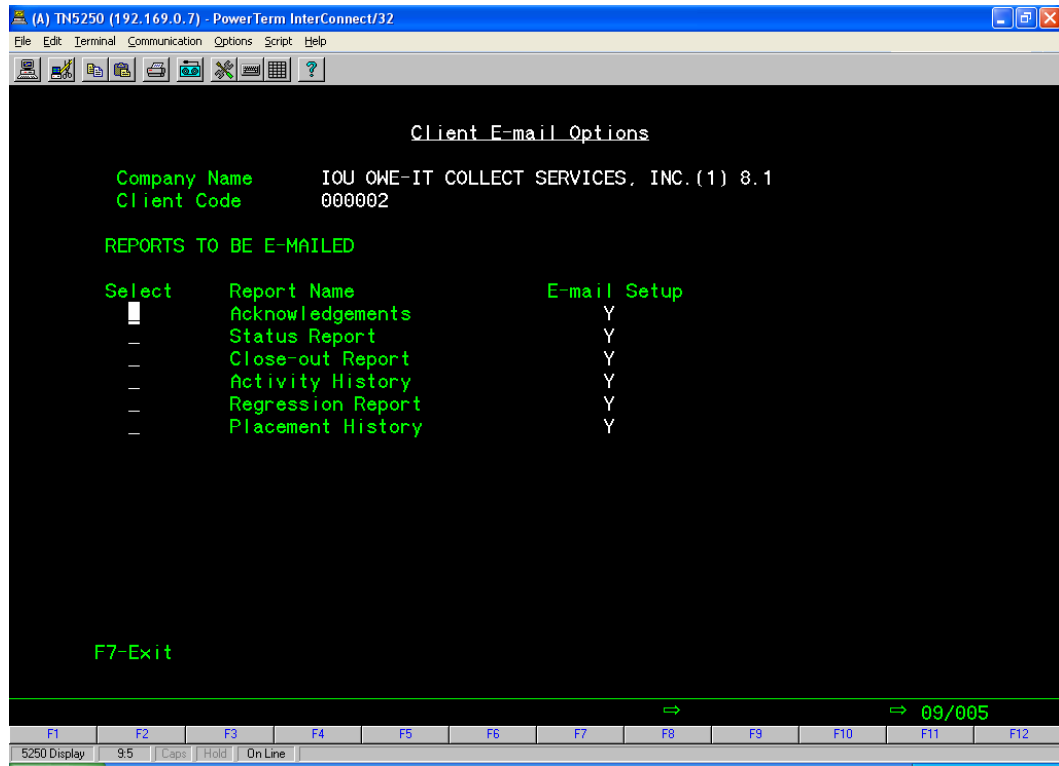

Figure 11 - Client Update setup

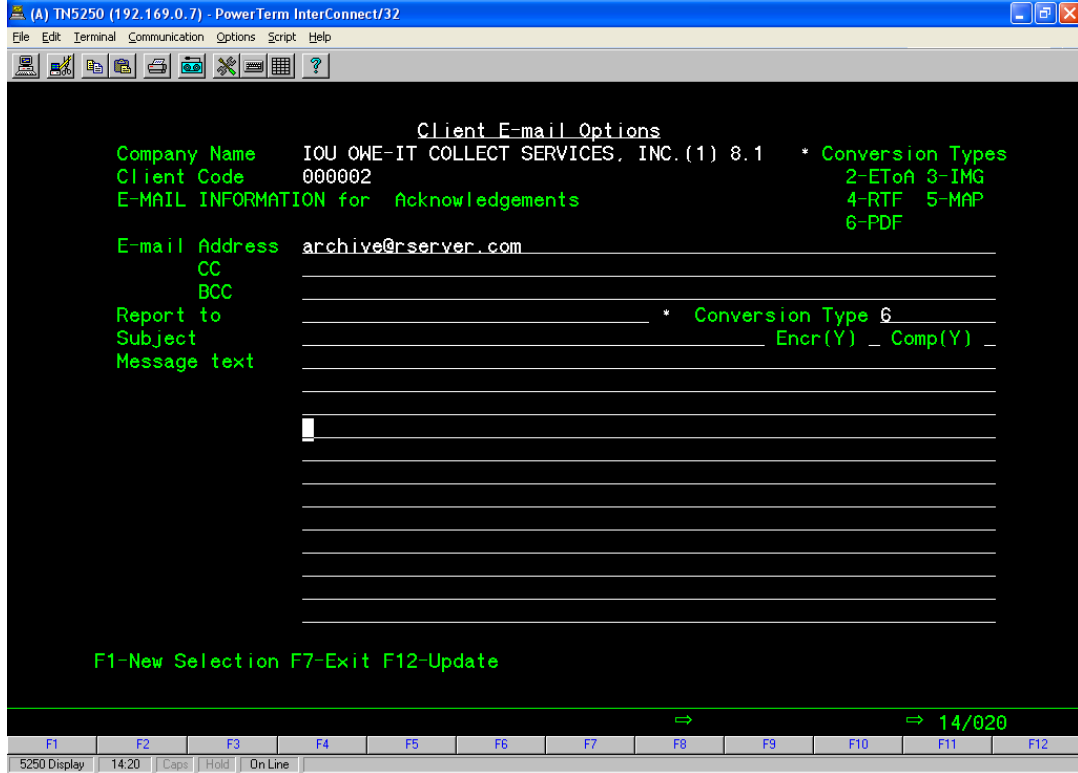Figure 12 - Client Update Select Reports

Figure 13 - Emailing Options Setup

8.0 Sending Reports to the Web

Reports would now be sent to web when you request a report that were setup in the previous step.

For example to send the acknowledgement report to web steps are as follows:

1. Go to Periodic Reports Menu, (Option 14 from Main menu Intelec.)
2. Selection Option 19 Acknowledgement Report.
3. Select the required options and Press Enter.
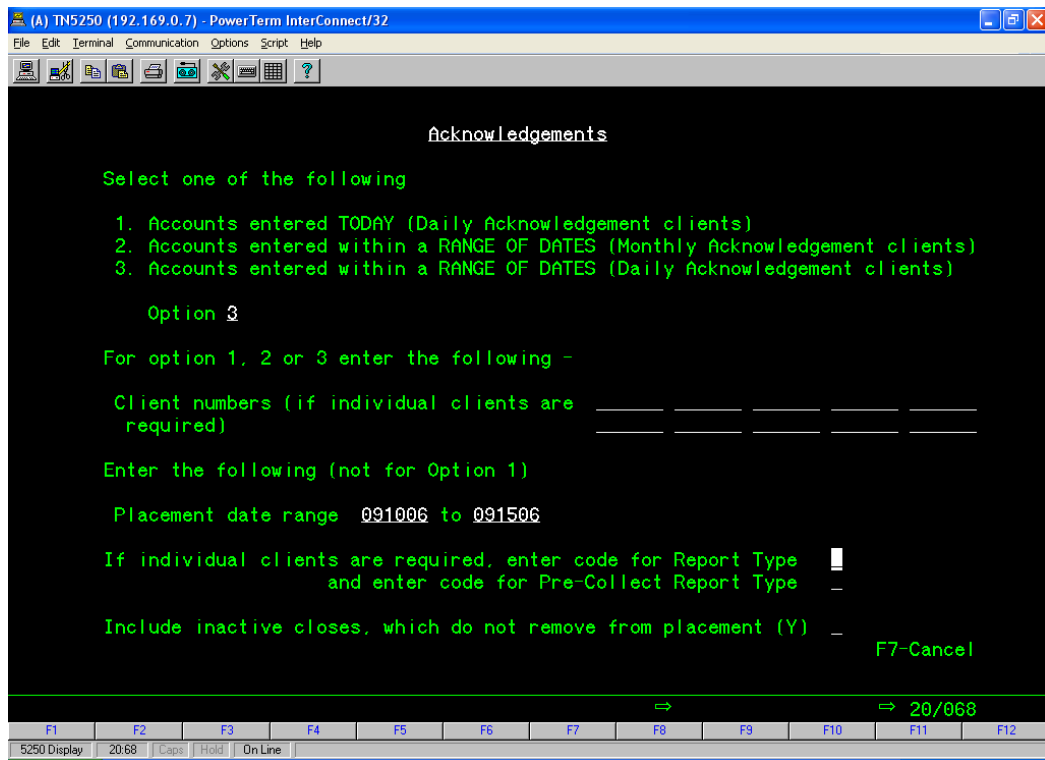4. On the Option for select client setup to send emails place a Y and Press Enter.

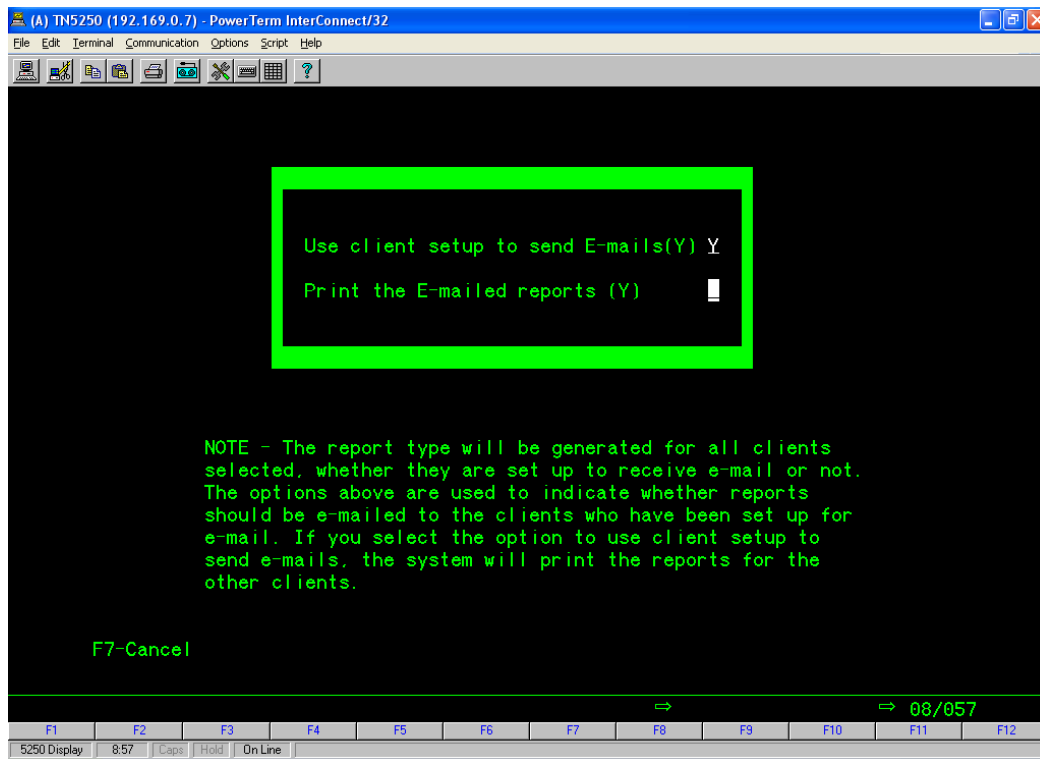Figure 14 - Requesting an Acknowledgement Report

Figure 15 - Confirm Sending Reports

9.0 Viewing Reports On-Line

To view the reports that you have just created, and to let others access their reports you will need to For your clients to be able to access the their reports you will have to give the web address of http://(Your web site)/

If you already have a web site you can give a link to the newly created web site/virtual directory.

You can inform your clients to log on to your web site to view reports. Send them their User Name and passwords as defined in step 7.

The report server is now ready to accept reports. .The following are the reports that can be requested.

a. Placement History Report (Report by Client)
b. Activity History Report
c. Status Report
d. Regression Report
e. Acknowledgements
f. Close out Report