

2013 Orlando/Oct 6-9

The **1** Conference

1EDIsource™

Getting Started with EDI/HQ™

Presenter: Seth Lepper

Ground Rules

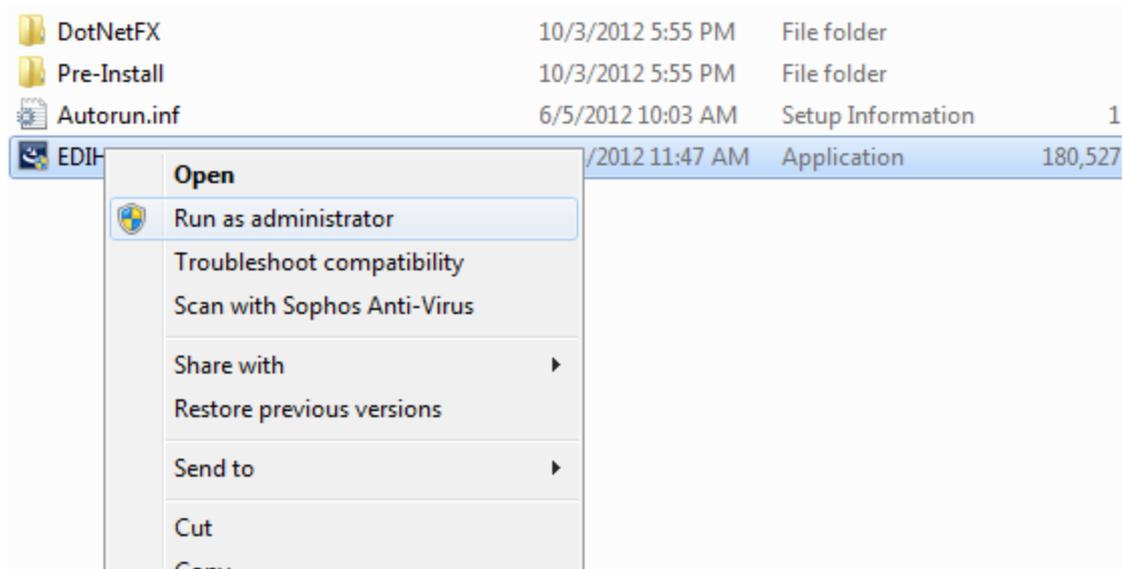
-  Please silence your phone
-  Questions are encouraged anytime
-  Presentation will be followed by a Q&A
-  Come see me in the ReSource Center

Agenda

-  Installing EDI/HQ™
-  Dashboard
-  Data Sources
-  Trading Partners
-  EDI Transaction Filters
-  Data Conversions
-  Jobs and Processes
-  File Definitions
-  EDI Data Window
-  Reports

Installing EDI/HQ™

EDIHQ_Setup.exe



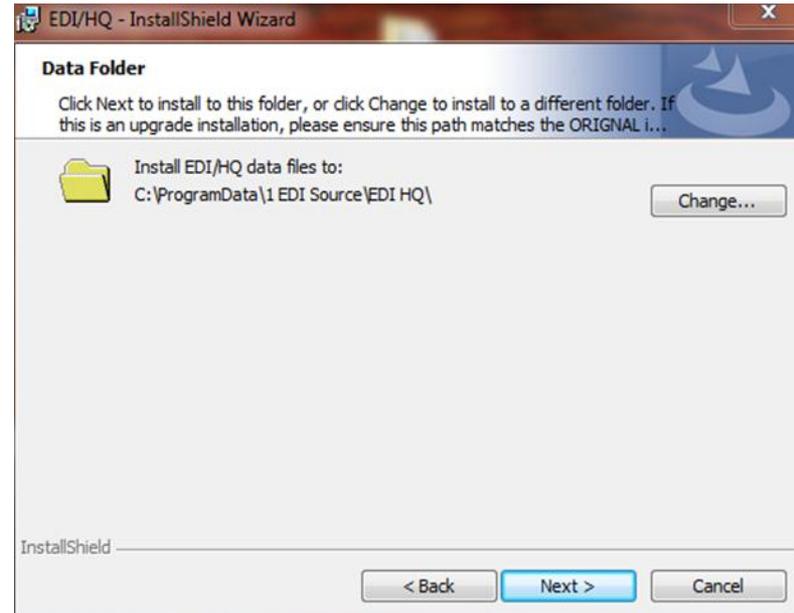
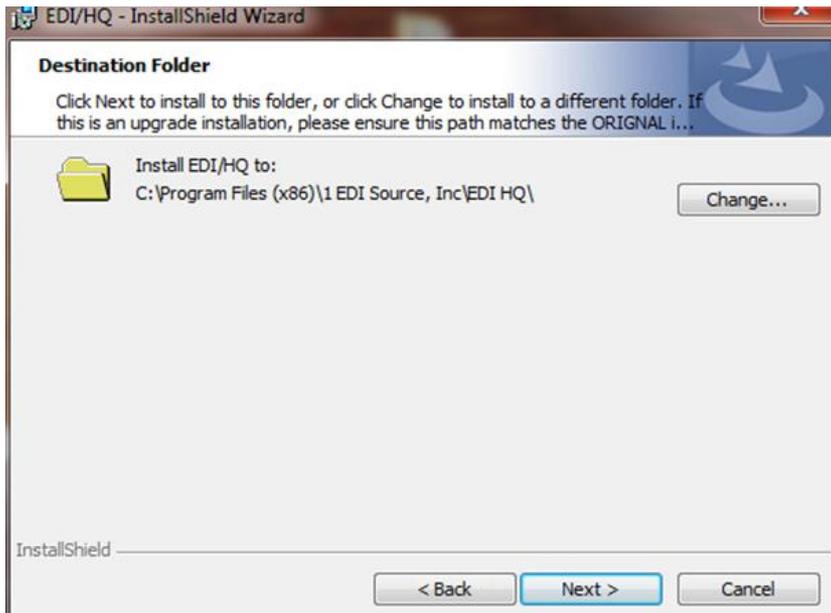
Installing EDI/HQ™

Follow the On-Screen Instructions



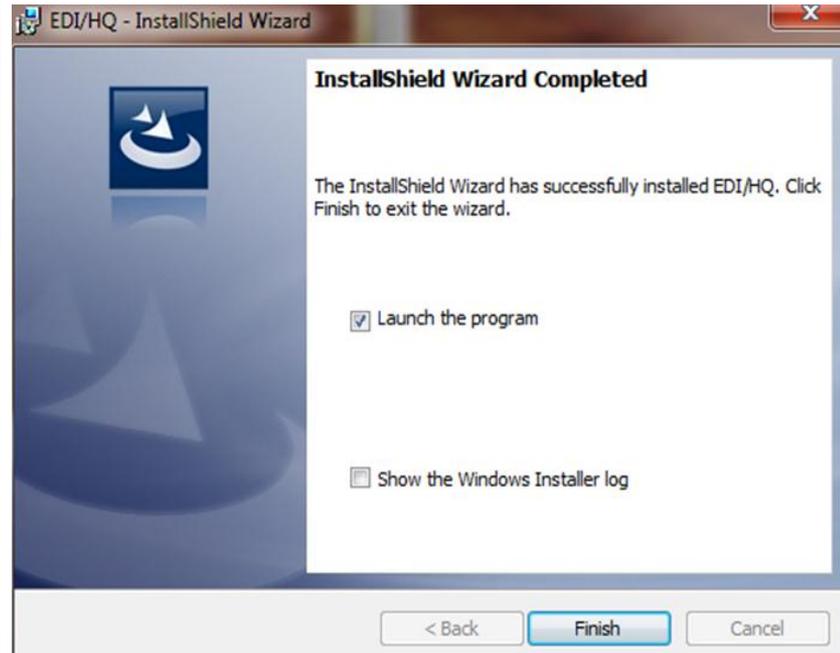
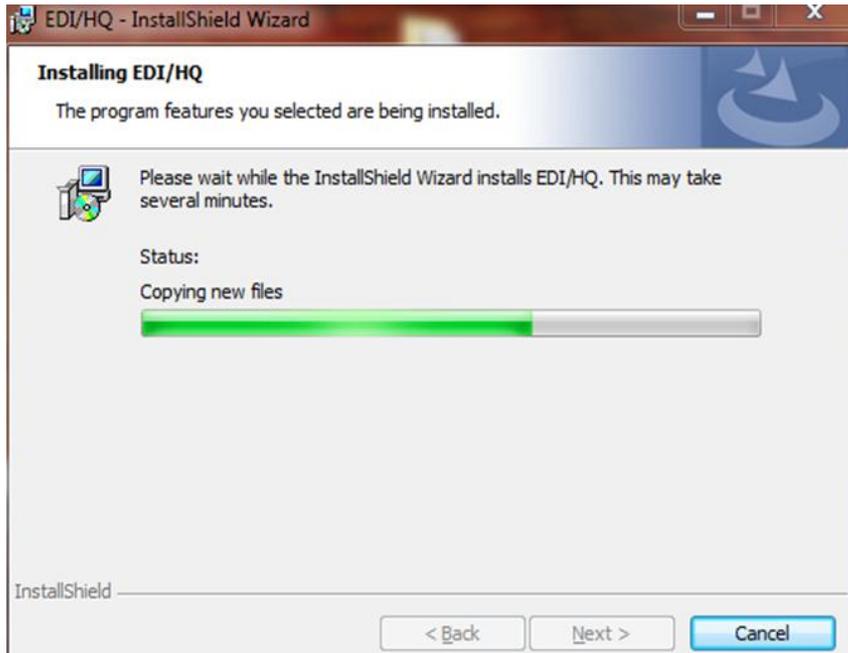
Installing EDI/HQ™

Installation Directories



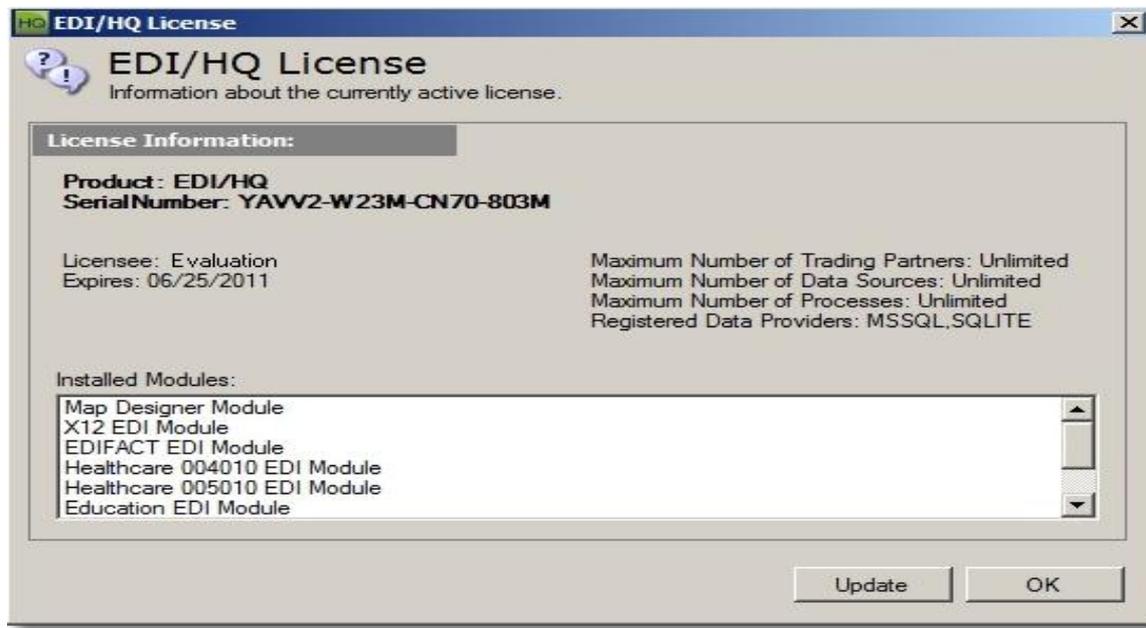
Completing Your Installation

 Select “Finish” to Complete the Install



EDI/HQ™ License Keys

-  EDI/HQ™ requires the activation of a valid EDI/HQ™ license in order to function.



Dashboard

Customizing your Dashboard

Edit/Delete Widgets

EDI/HQ SERVER 3.2.4.151 [Stone Edge]

File View Tools Setup Automation/Processing Reports Help

EDI/HQ - Dashboard

Configure Open Default Filter Export Dashboard Import Dashboard Error Files Refresh

Stone Edge

EDI/HQ

- Dashboard
- Trading Partners
- Transaction Filters
- Data Conversions
- Jobs & Automation
- File Definitions

XML RPC Integration

- XML RPC Listeners

EDI/HQ - Dashboard

- Configure
- Open Default Filter
- Error Files
- Refresh
- Export Dashboard
- Import Dashboard

Trading Partners

Click on an item to view its details.

Transactions Not Acknowledged

Click on a date to view the transactions.

Filter	Inbound	Outbound
All Not Acknowledged from Today	0	0
All Not Acknowledged from Yesterday	0	0
All Not Acknowledged from This Week	0	20
All Not Acknowledged from Last Week	0	0
All Not Acknowledged from This Month	0	21
All Not Acknowledged from This Year	0	26

System Alerts

Click on an alert to view its details. Displaying 50 of 260 alerts

Alert Time	Alert Description
08/27/13 10:57:17 AM	T-Set Generated: 940
08/27/13 10:57:17 AM	Trading Partner Generated: 6544600C
08/26/13 11:12:08 AM	[IEDI\sethl] Data_source Stone Edge upgraded
08/26/13 10:34:34 AM	T-Set Generated: 940
08/26/13 10:30:59 AM	Missing or Blank Unique ID
08/26/13 10:30:59 AM	Missing or Blank Unique ID
08/26/13 10:30:59 AM	Missing or Blank Unique ID
08/26/13 10:30:59 AM	Missing or Blank Unique ID

Transactions Rejected or in Error

Click on the filter name to view the transactions.

Filter	Inbound	Outbound
EDI/Mapping Errors (Built In)	0	5
FA Errors (Built In)	1	0
FA Rejected (Built In)	0	0

Last 5 Sessions

Click on the session to view the transactions.

Report	Session Start	Session End	Inbound	Outbound

Transactions by Trading Partner

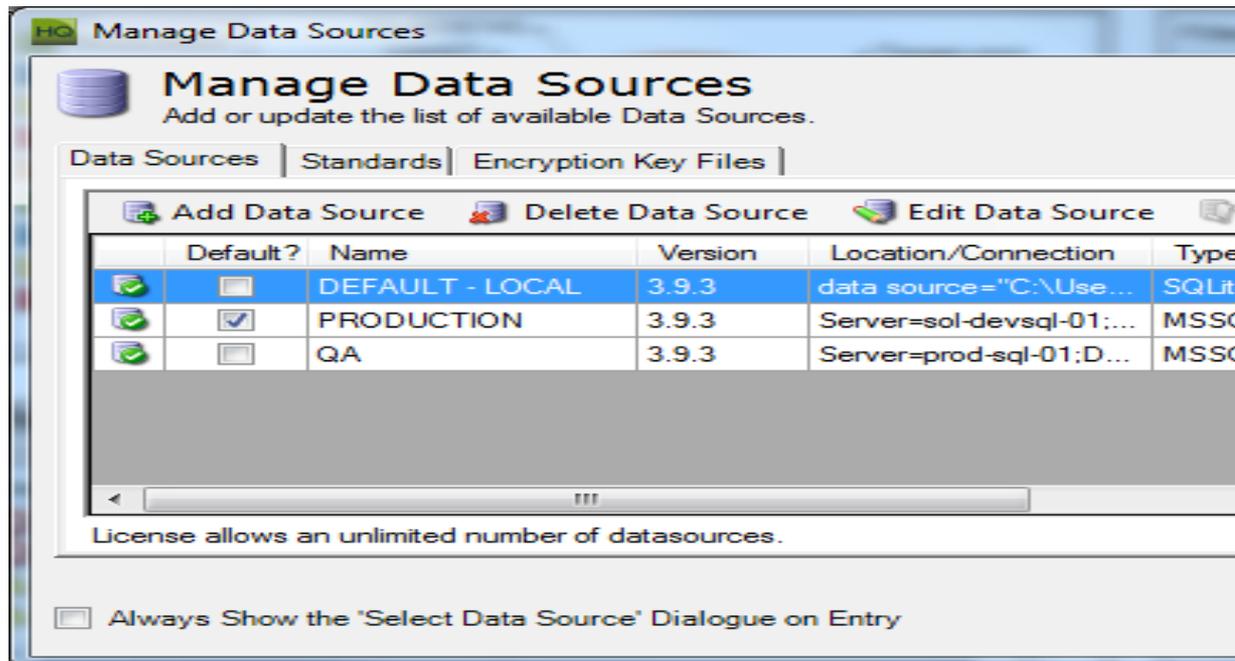
Click on an item to view its details.

Trading Partner Alias	Inbound	Outbound
6544600C	1	1
925485US00	3	23
AMAZON	5	15
GEAR1MUSIC	1	2
JCI	1	1
Taylor Made	1	1

DataSources

A Data Source is a Database in which EDI/HQ stores information that the software needs to function

- 1 Utilizing Multiple Data Sources
- 1 Adding Data Sources



DataSources

Currently EDI/HQ™ supports 3 different database engine types that can be used for Data Sources:

-  SQLite
-  Microsoft SQL Server Express
-  Microsoft SQL Server

Trading Partners

-  Importing EDI to Create a New Trading Partner
-  Importing and Exporting Trading Partner Information
-  Edit a Trading Partner
-  Configure T-Sets

EDI Transaction Filters

 Access Existing Filters

 Create New



The screenshot shows the EDI/HQ SERVER 3.2.4.151 [Default] interface. The main window is titled "Transaction Filter" and contains a table of filters. The table has columns for Name, Built In, Default, and Description. The filters listed are:

Name	Built In	Default	Description
All Transactions (Built In)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All Transactions in the Data Source.
EDI/Mapping Errors (Built In)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Transactions with EDI Errors or Mapping Errors.
FA Errors (Built In)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Transactions with Functional Acknowledgment Errors.
FA Rejected (Built In)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Transactions with Rejected Functional Acknowledgments.
Non 997, 999, CONTRL (Built In)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	All Transactions except 997, 999, and CONTRL.
Transactions this Month (Built In)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Returns a list of all transactions from this month.
Transactions Today (Built In)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Returns a list of all transactions from today.

The interface also includes a menu bar (File, View, Tools, Setup, Automation/Processing, Reports, Help) and a sidebar with navigation options like Dashboard, Trading Partners, Transaction Filters, Data Conversions, Jobs & Automation, and File Definitions. The Transaction Filters section in the sidebar includes options for Open Default Filter, New Filter, Import Filter, and Refresh.

Data Conversions

-  Purpose of Data Conversions
-  Create a Data Conversion from Excel and Import
-  Create a New Data Conversion in EDI HQ

Jobs and Automation

Automation in EDI/HQ™ consists of 4 components:

-  Processes
-  File Definitions
-  Jobs
-  Triggers

Built-In Processes

- 1 Import all Inbound EDI Data Files
- 1 Import and Map All Outbound Application Data Files
- 1 Map Inbound EDI Data to Application Data
- 1 Pause 60 Seconds
- 1 Write Outbound Mapped Data to Outbound EDI Files

User Defined Processes

-  Generating a Report
-  Retrieving Files From an FTP Server
-  Loading Data into an Accounting or ERP Package
-  Importing EDI Transactions

File Definitions

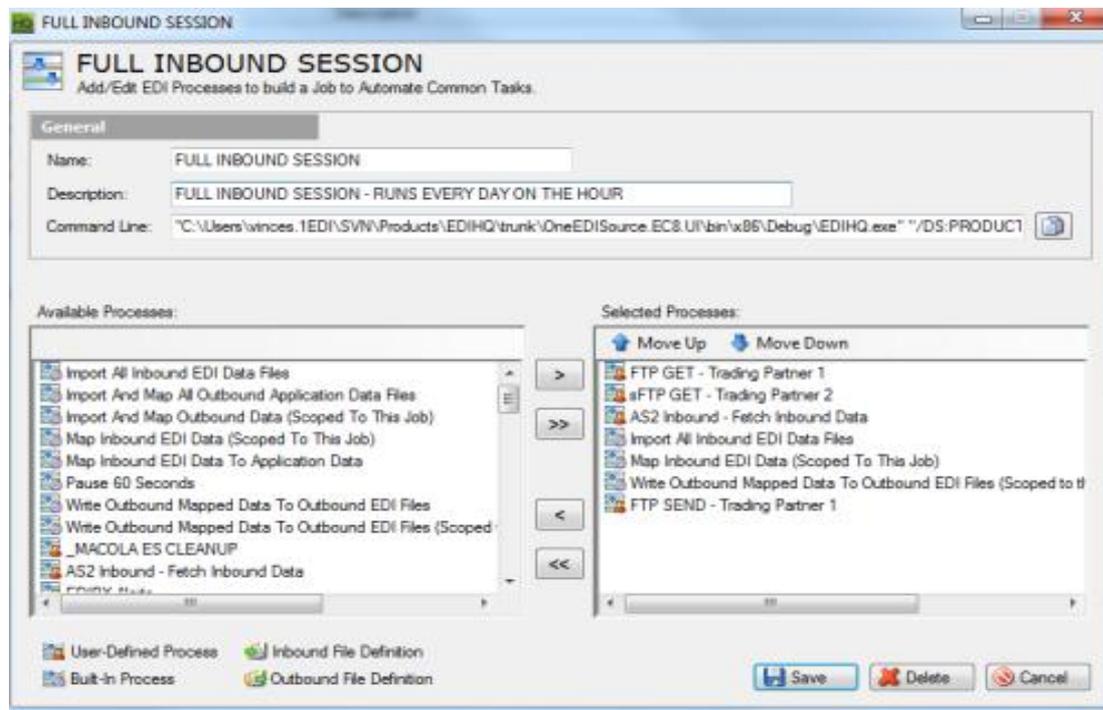
File Definitions are used to get Transactions into EDI/HQ™ so that the Transactions can be Mapped.

 Inbound EDI

 Outbound

Jobs

An EDI/HQ™ Job is a Collection of One or More Processes or File Definitions that EDI/HQ™ will Execute Sequentially.



Triggers

You Create EDI/HQ™ Triggers to Execute Jobs When Some Certain Criteria is Reached. Currently, EDI/HQ™ has 2 different Types of Triggers:

-  Scheduled-Based-Used to execute a Job at set time
-  File-Based- Used to execute a Job when a file or files is found or when a files reach a certain size

Questions?