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# Intelec Report Access User Guide

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Version 1.3.1

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## Revision History

<b><i>Date</i></b>	<b><i>Version</i></b>	<b><i>Author/Editor</i></b>	<b><i>Comments</i></b>
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.
Apr 2009	V 1.3.0	Sampath Jayasinghe	Fixes the issues and upgraded.
May 2009	V 1.3.1	Sampath Jayasinghe	Added automated web site installation details.

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## 1.0 Introduction

Intelec Report Access would allow sending 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 Debt collection system.

Please follow the steps carefully in setting up the Intelec Report Access. For the report server to function properly the components have to be setup in both 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 6.0 or later should also be installed on the web server. This comes with Windows Server 2003 standard edition.

### 3.0 Installing Intelec Report Access

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.

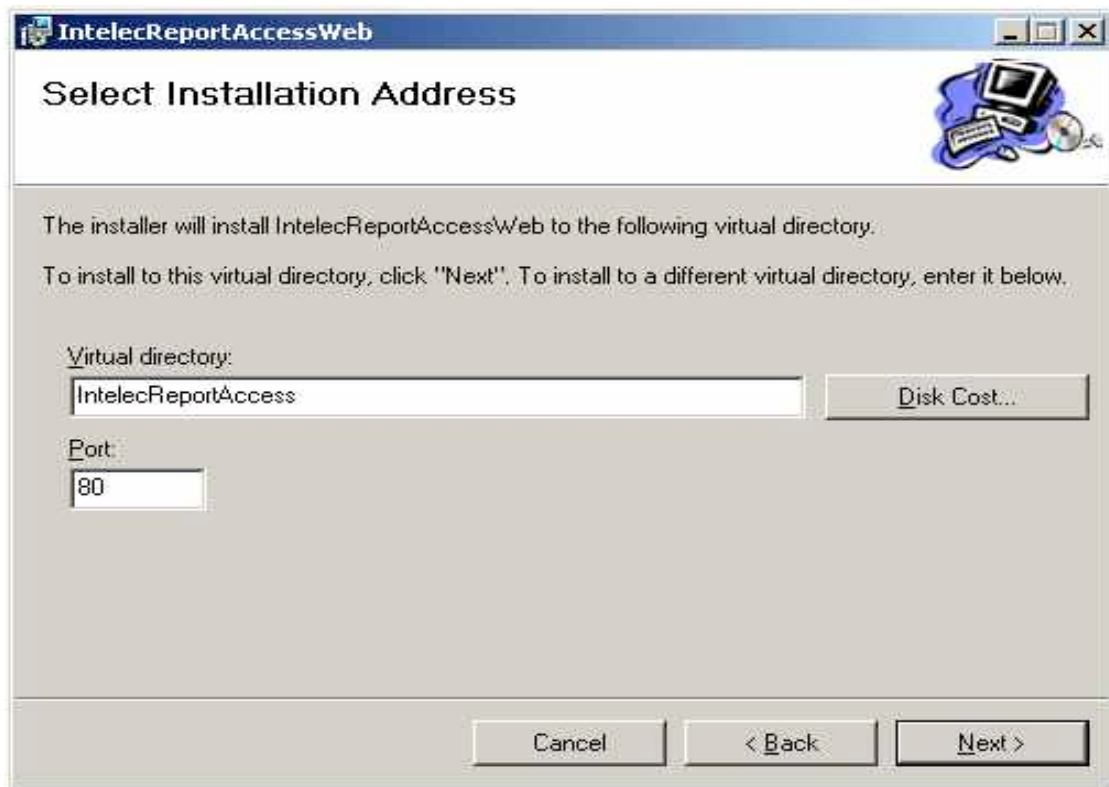


Figure 1 – Intelec Report Access Web setup

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”



## 4.0 Setting Firewall Exceptions

**Note :** This section describes how to add an exception to Windows Firewall. But if you are using a different firewall please contact its' vendor to get information to accomplish this part. Even though the firewall is OFF, we recommend following these steps to let this application properly function in case the firewall turned on later.

1. Open Windows Firewall by : Start > Settings > Control Panel . And double click on “Windows Firewall” icon.



Figure 2 – (Left) Windows Firewall

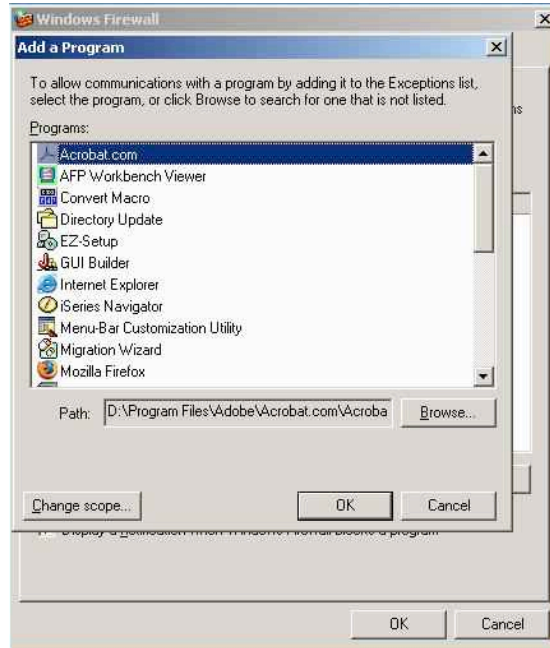


Figure 3 – (Right) Add a program dialog

2. If the firewall is Off, temporarily turn it On. Clear the “Don’t allow exceptions” check box as in above figure on the left.
3. Click on “Exceptions” tab.
4. Click “Add Programs...” button and you will see the “Add a Program” dialog as in above figure on the right.
5. Click “Browse” button. Browse dialog box will appear.
6. Go to the Server installation path. If you didn’t change it while installation it should be “C:\Program Files\Quantrax Corporation Inc\Intelec Report Access Server”.
7. Select “IntelecReportService.exe” and click on “Open” button.

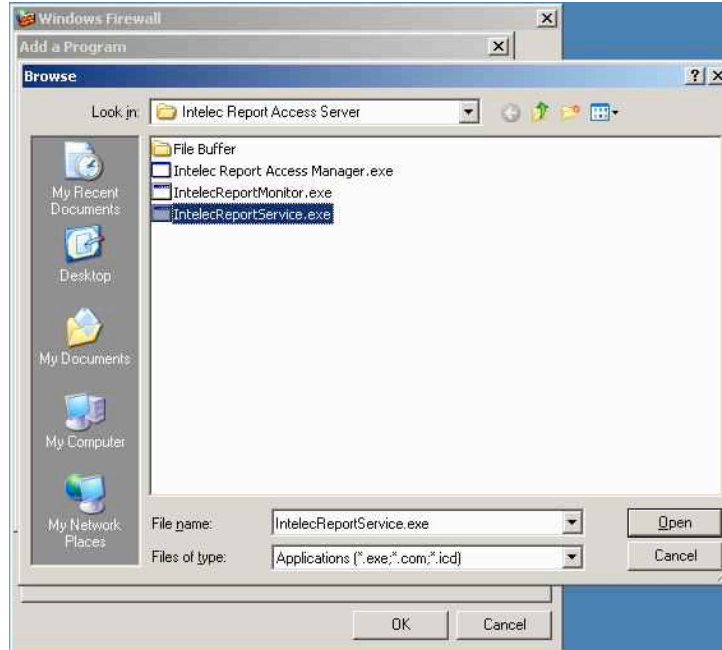


Figure 4 – Browse dialog

8. Click “OK” button on Add a Program dialog. Then you will see Windows Firewall window.

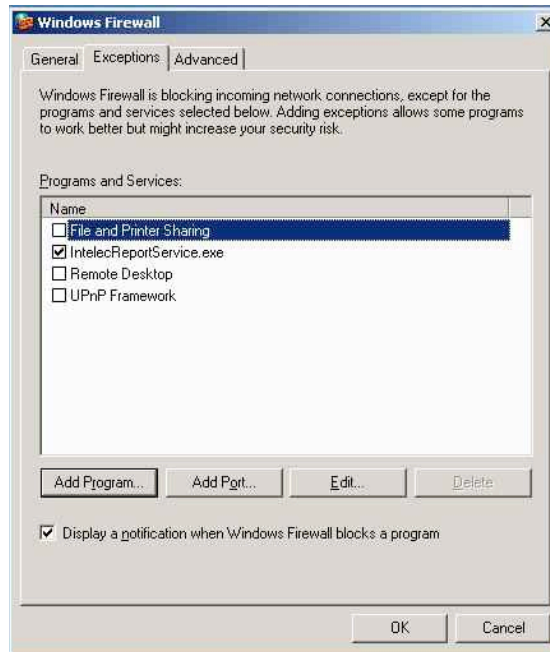


Figure 5 – Exceptions tab – windows firewall

9. Click “Add Port...” button.
10. “Add a Port” dialog appears.

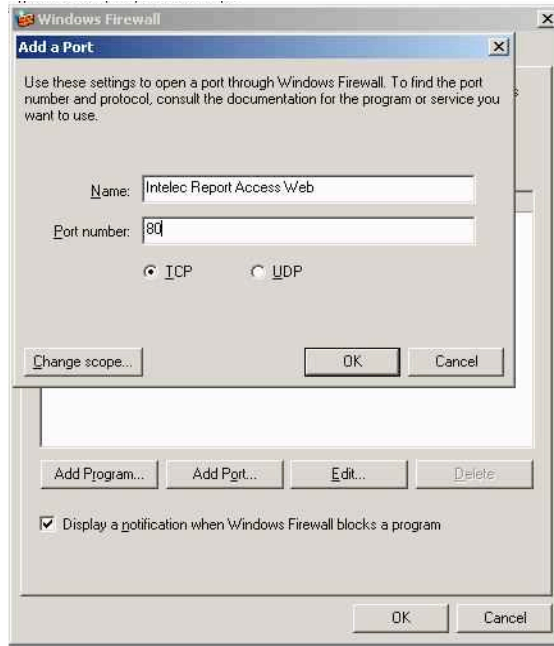


Figure 6 – Add a Port dialog

- 11. Set Name to “Intelec Report Access Web”, Port to 80 and select TCP.
- 12. Click “OK”.

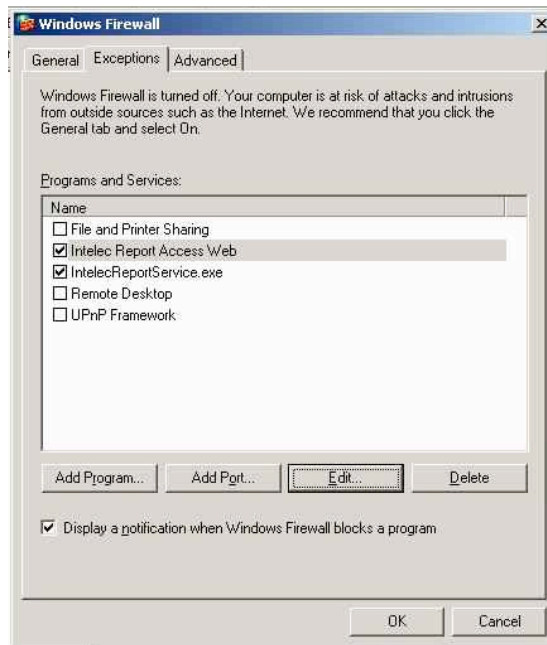


Figure 7 – Exceptions tab – windows firewall

- 13. If you turned On the firewall as in step 2, turn it Off. Click “OK”.

## 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 > Quantrax Corporation Inc > Intelec Report Access Manager.

**Note :** If you have installed above setups into a different drive other than C:\ drive you will see the following message. That is due to incorrect configuration settings and after the changing those as in next few step you will not see this again. So please ignore it for the first time.



Figure 8 - Error message at first loading if the installed drive is different from C:\

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 unless if you didn’t see the message described in 5.1! If the installed drive is different only change the drive letter of the directory paths.

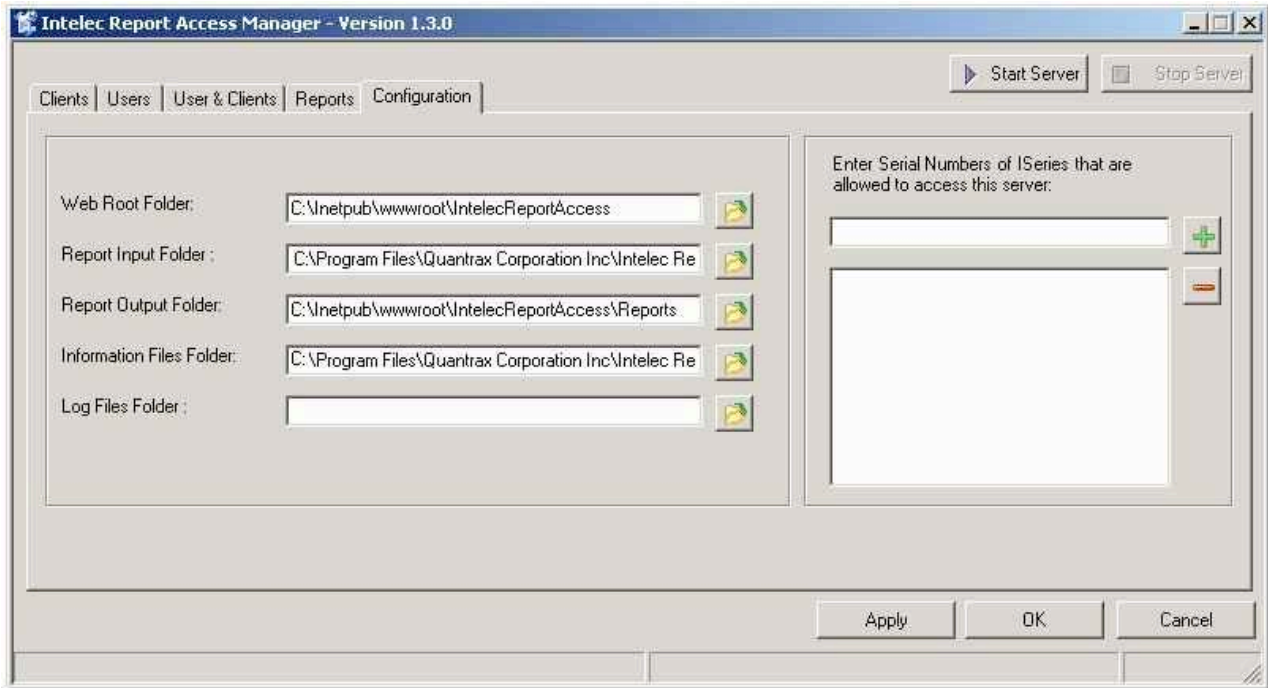


Figure 9 - Intelec Report Access Manager Configuration Tab

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.

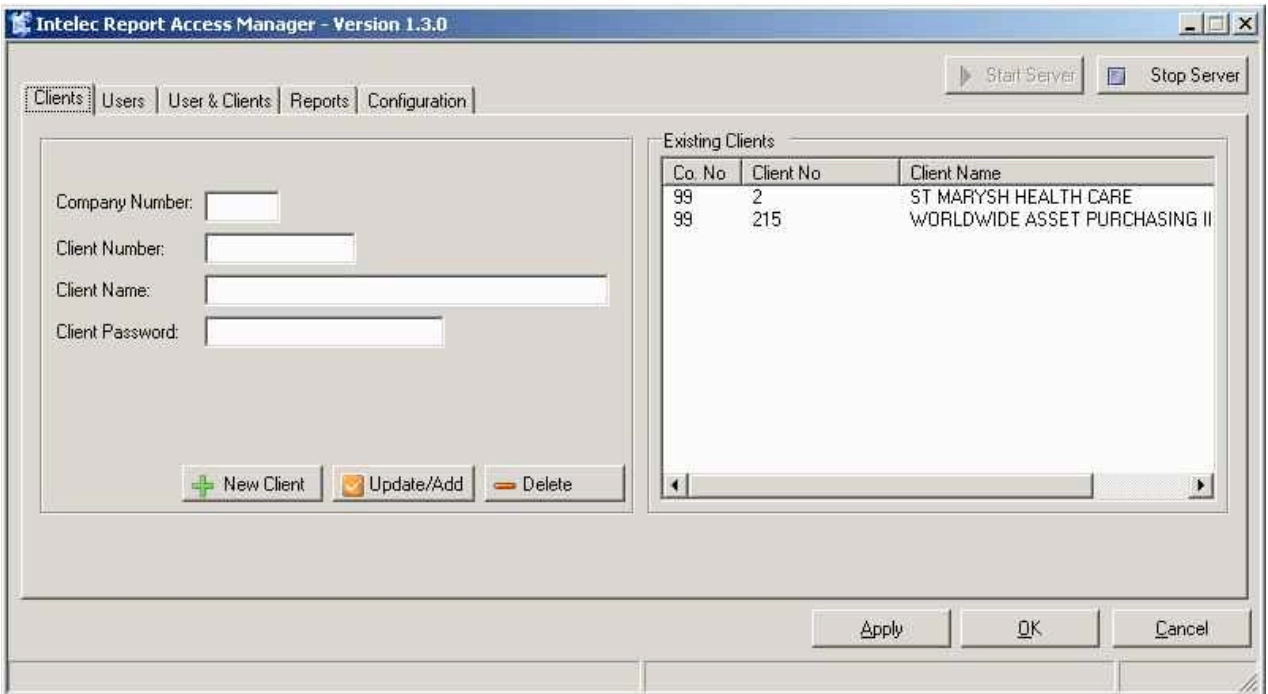


Figure 10 - Intelec Report Access Manager Clients Tab

**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 effect.



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.

- 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 not company specific.* When you need to give a client access to a company’s reports, they will need to assign clients to a user name. This will be explaining in detail later.

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.

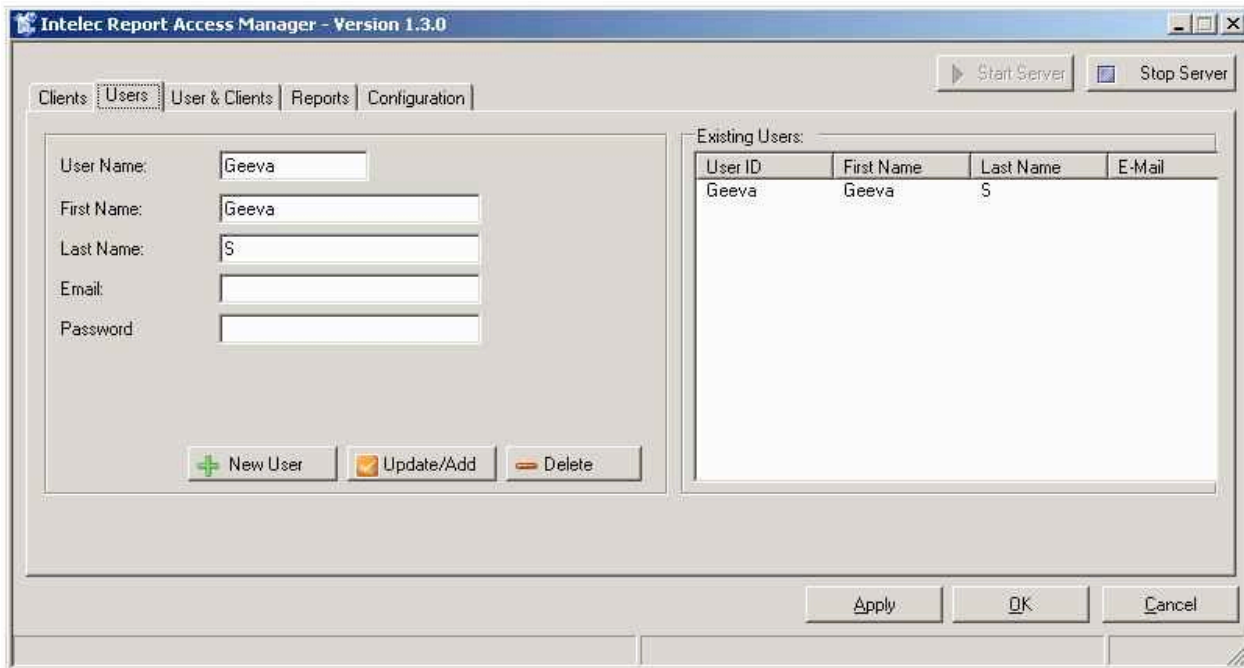


Figure 11 - Intelec Report Access Manager Users Tab



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 effect.



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

8. Next step is to assign one or more clients to user names. First select an user from “Users” tab. Then click on the “User & Clients” tab.
9. User & Clients Tab – Now you will see the previously selected user name here in bold letters. If not selected “?”. In that case you have to go back and select an user. Each user must have at least one Client.

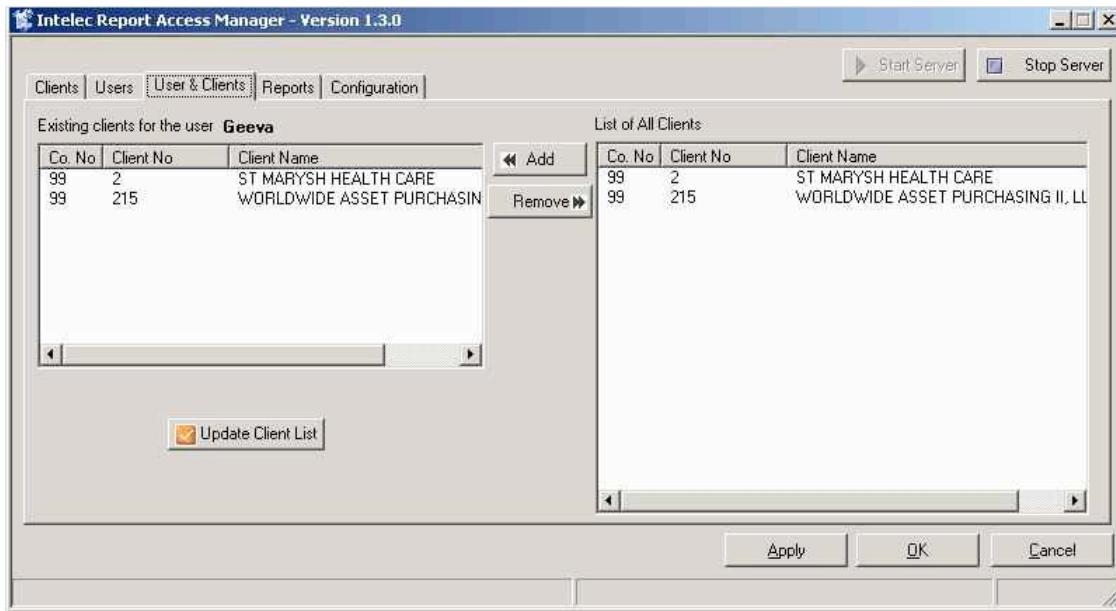


Figure 12 - Intelec Report Access Manager User & Clients Tab

10. 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 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” button (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 “Update Status” button (The Lock) icon.



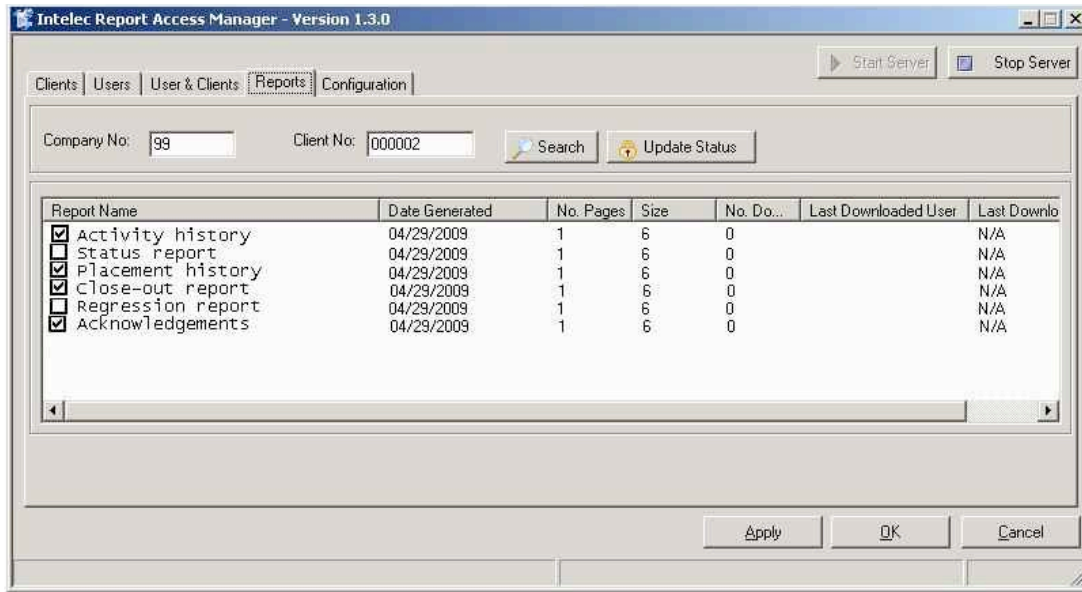


Figure 13 - Intelec Report Access Manager Reports Tab



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.

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

- i. 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..



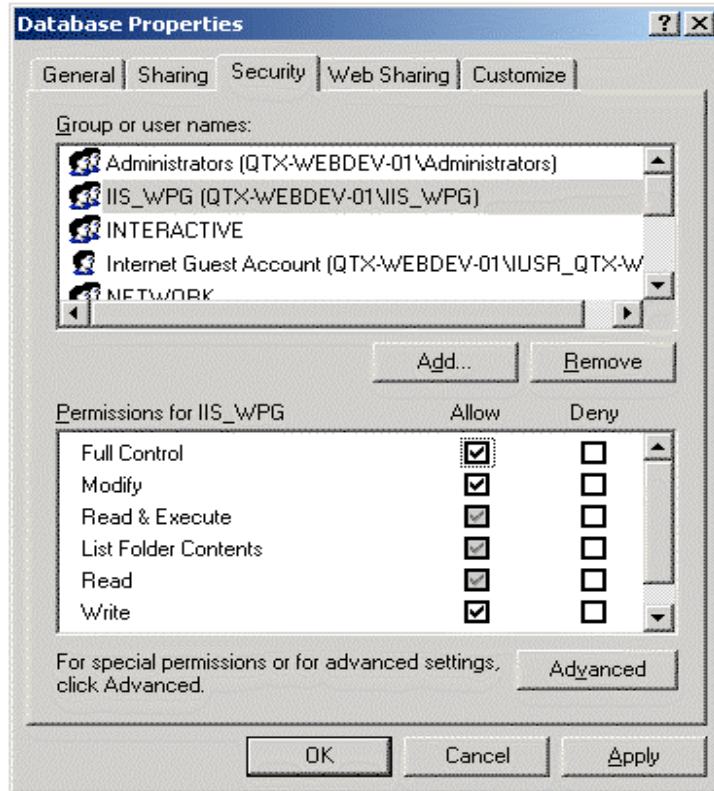


Figure 14 - Setting Security for Web Site

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 exists 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.)

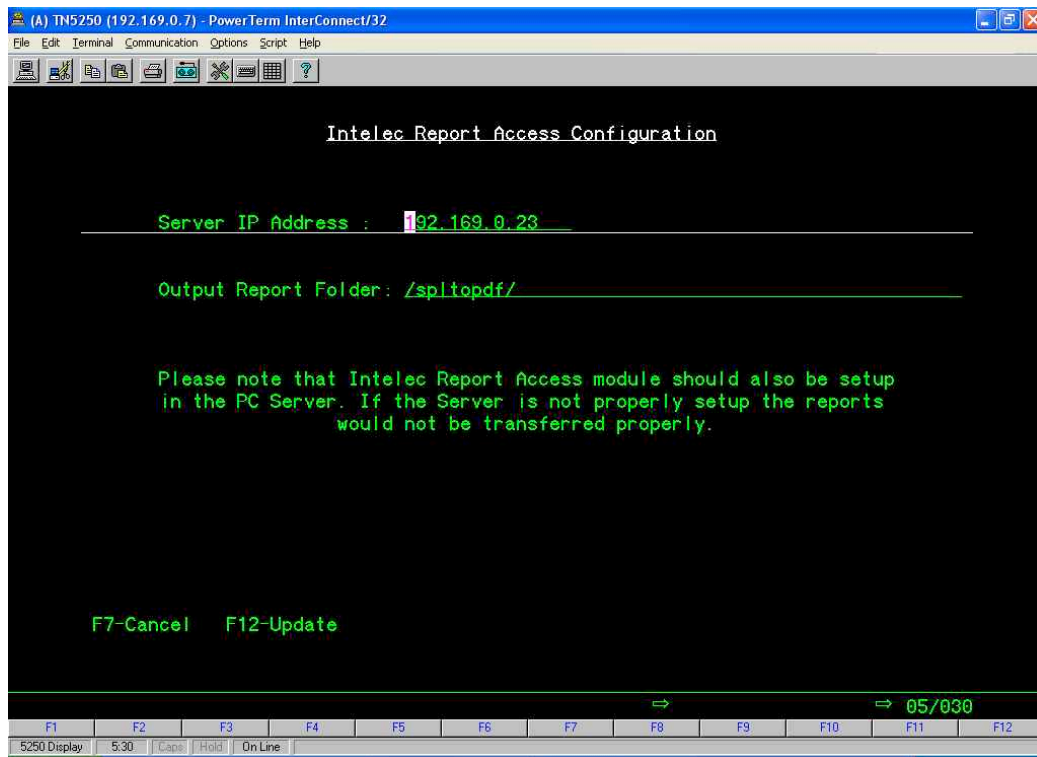


Figure 15 - Setting Up Intelec Report Access on the iSeries

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](mailto:archive@rserver.com).
6. Conversion type should be 6 for 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.

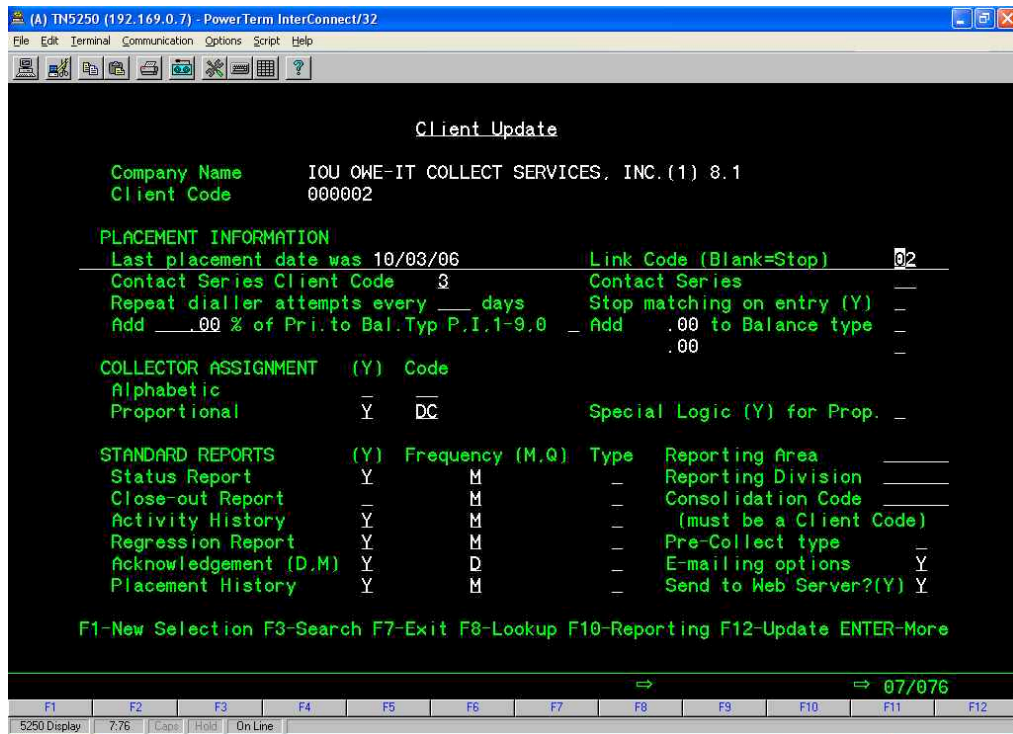


Figure 16 - Client Update setup

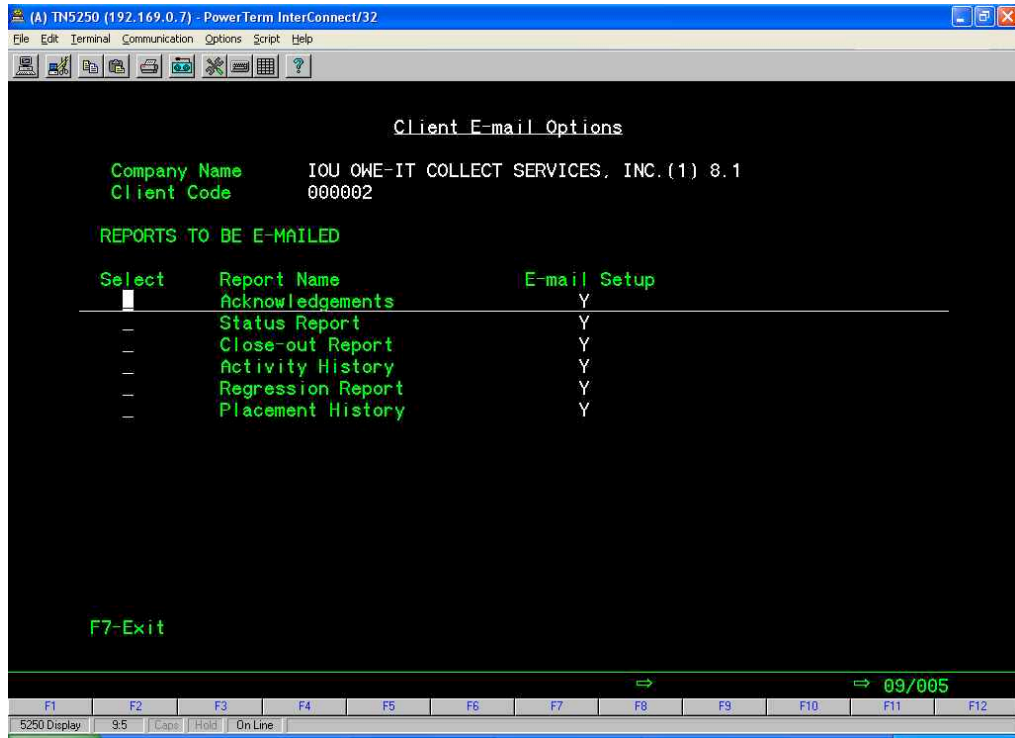


Figure 17 - Client Update Select Reports

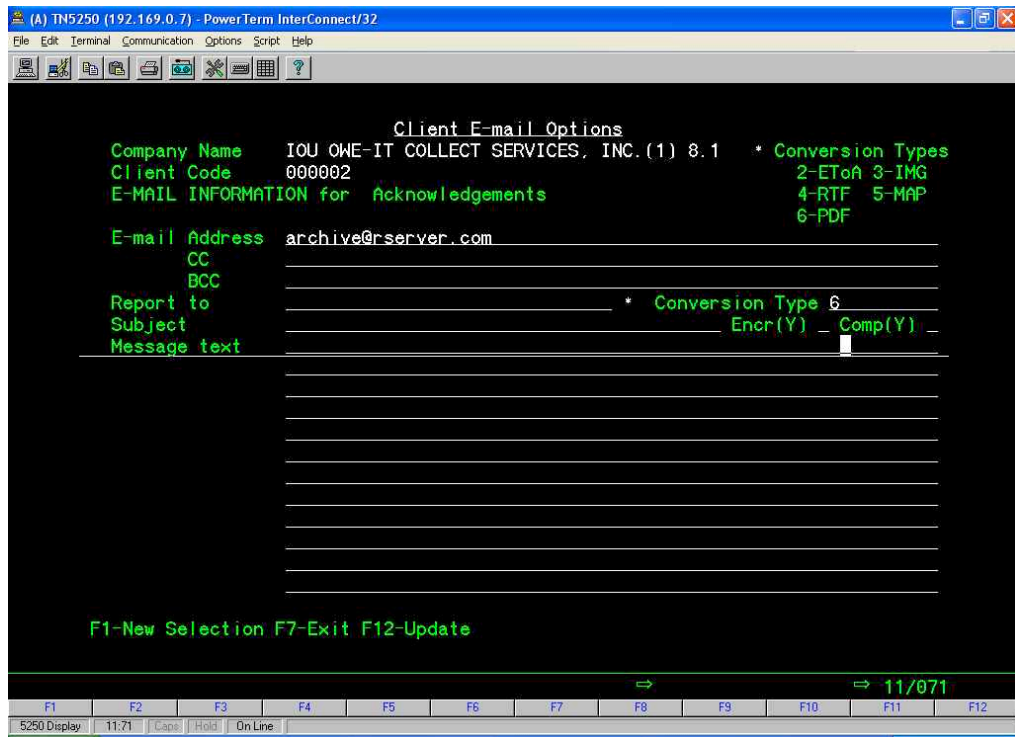


Figure 18 - Emailing Options Setup

## 8.0 Sending Reports to the Web

Reports would now be sent to web when you request a report that was 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.

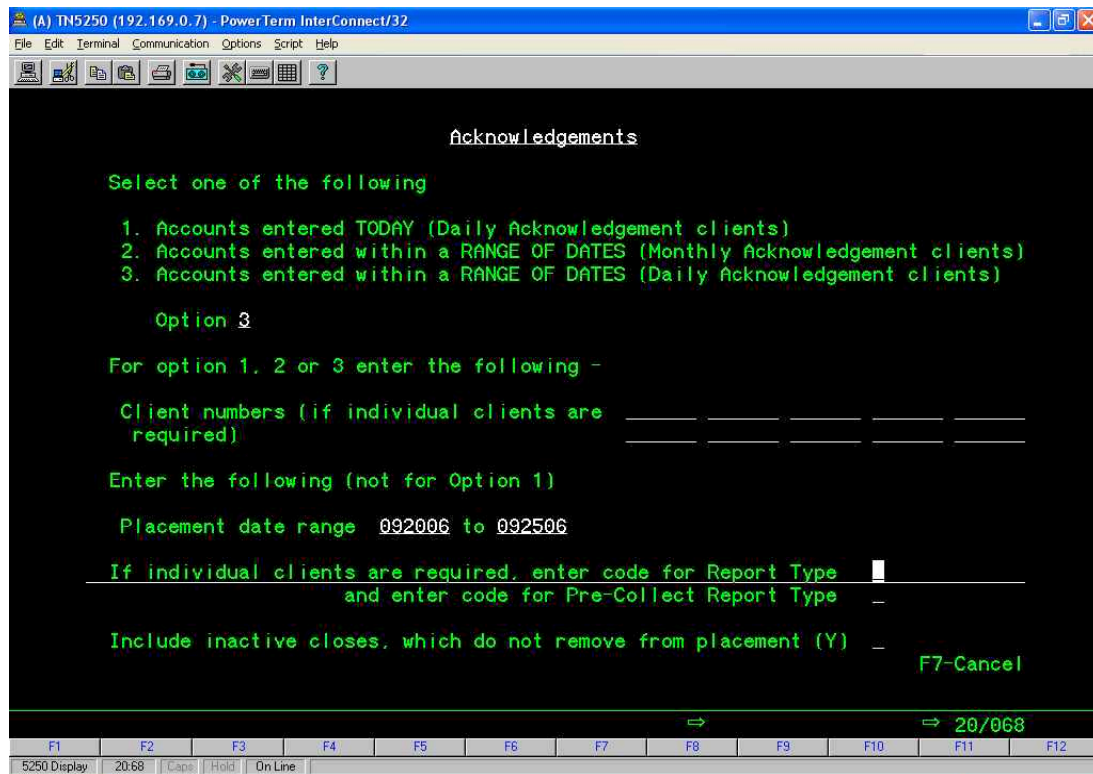


Figure 19 - Requesting an Acknowledgement Report

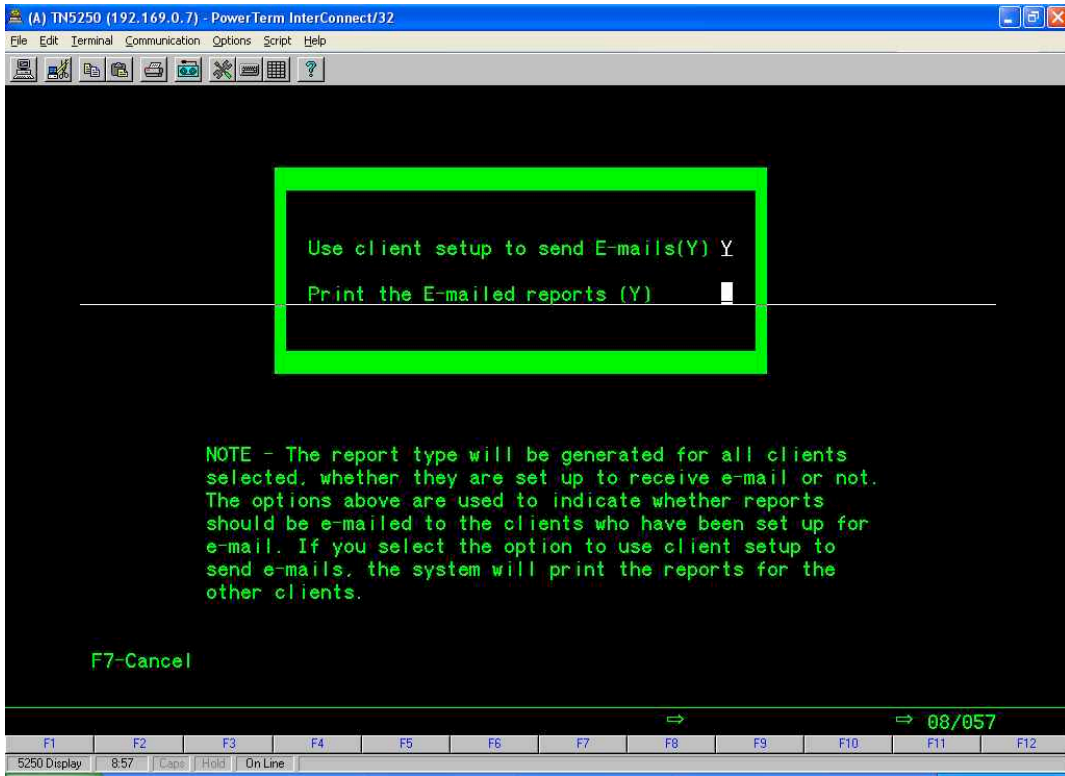


Figure 20 - Confirm Sending Reports

## 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://\(Your web site or IP address\)/intelecreportaccess/login/login.aspx](http://(Your web site or IP address)/intelecreportaccess/login/login.aspx)

e.g. <http://www.quantrax.com/intelecreportaccess/login/login.aspx>

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 section 6.

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