Orchard

information systems

Orchard Housing

Product: Orchard Housing

Module: Responsive Repairs

Document Name: Keyfax System Administration
                  Guide

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Version Control

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0.1	26/11/2010	Justine Lea/Helen Franks	New Document
1.0			Formatting and Proofing

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Some of the following screen shots may vary due to different licensing, software versions and client configurations.

Contents

Introduction

The Keyfax integration is an interface between the Orchard Housing Responsive Repairs product and Omfax's Keyfax diagnostic product. It allows you to add a repair to Orchard Housing using an XML file produced by an external system.

The Keyfax integration requires a number of elements to be imported into Orchard Housing. The import process involves running a script which imports numerous XML files. Once the files have been imported the solution can be configured.

Note: Before loading any of the integration components check if server side caching is switched on. Switching server side cache on and off and loading components should be done when nobody is on the system.

Pre-requisites

Licence Codes

The Keyfax is an optional extra. A licence code should be obtained for additional product L02017 (Jobfax Interface) from the Orchard Service Desk.

Licence Codes for additional products are entered from the following Housing Function Menu Admin:
Housing Function Menu Admin > Common > System Administration > Miscellaneous > Optional Extras

Release Version

This integration is available from release 2010A01.

Keyfax Product

The Keyfax product should be available and installed prior to this interface being configured.

There is a setting within Keyfax (<SetStartupFlagReturnAfterTicks>) that determines how Keyfax integrates with Orchard Housing and this needs to be configured by Omfax to ensure that job details are returned to Orchard Housing.

Keyfax contains the history of repairs which have been raised using Keyfax.

Further Considerations

- Priority Codes within Keyfax should match those within Orchard Housing.
- Schedule of Rates items within Keyfax should match those within Orchard Housing.
- Consideration should be given as to how pre inspections are to be raised if these are to be raised in Keyfax a unique schedule of rates item would need to be created which exists within both systems.

- User Id's within both systems must matched and maintained independently.

Installation Considerations

- The person responsible for installing the files should be familiar with the procedure for Application Server restarts (JBOSS, SJSAS and Glass Fish).
- The person responsible for installing the files should be familiar with the procedure for regenerating the local EDR database.
- The Java bin directory has been appended to the server's system PATH variable.
- The import files have been installed on the D:\ of the Orchard Housing server.

Note: There is currently not an install script for customers using UNIX.

Entity Pre-requisites

There is an Entity Type which is imported as part of the install which will need to be modified to reflect the customer's specific configuration.

- Priority Precedence – If there are multiple schedule of rates selected in Keyfax which priority would be applied to the repair in Orchard Housing. A list determining the order of the priorities can be determined using this entity.
- Inspection SOR Code – If inspections are to be raised in Keyfax then a pre inspection schedule of rate must be specified.
- Default SOR Volume Code – The schedule of rate volume being used.

Responsive Repair Entity Pre-requisites

The schedule of rate duplicate check functionality must be inactive if using the Keyfax integration.

Java Version

Check the Java Version

Before running the script ensure the Java bin directory has been appended to the server's PATH environment variable.

Carrying out the following test will establish whether or not this has been done:

1. Click the Windows Start button:

2. Click the Run command: to display the Run window.

3.   When the Run window opens enter '**cmd**' and press the OK button.
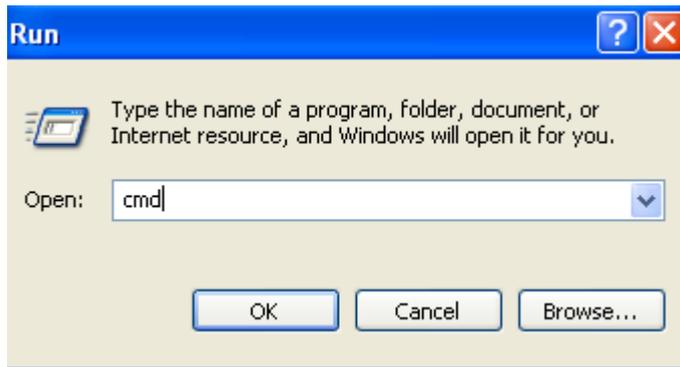
4.   A command window will then be displayed

5.   Type in **java –version** and press enter

6.   If the output of this command details a java version, the script will run.
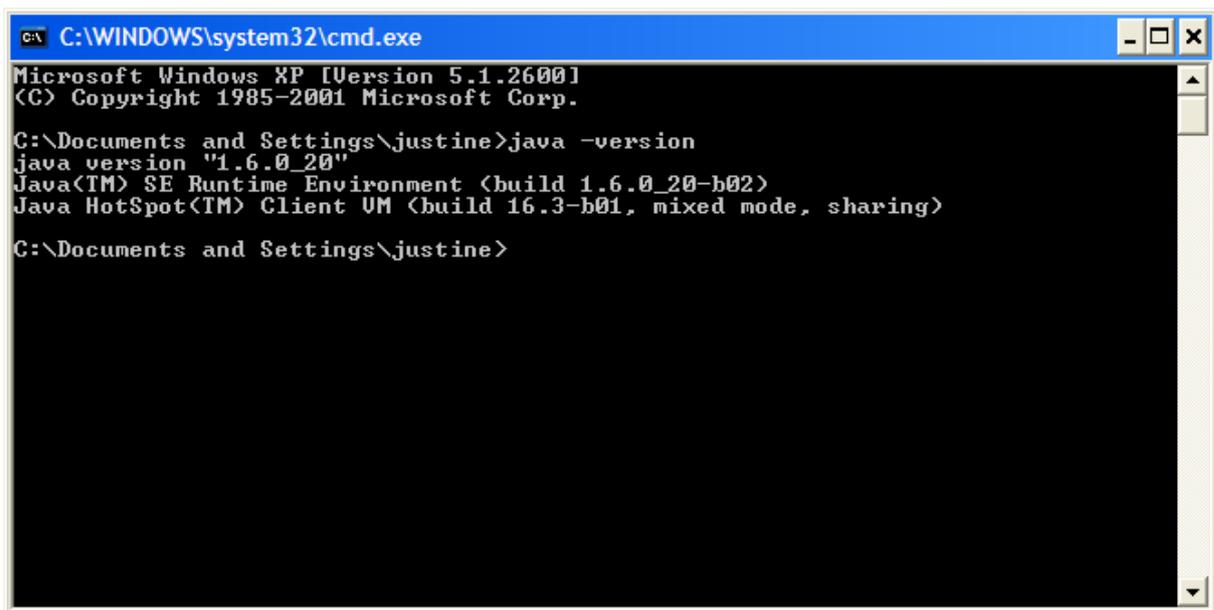
If the output states that **java is not a recognised as an internal or external command, operable program or batch file** the following procedure needs to be done:

1.   Right click "My Computer" icon
2.   Choose "Properties" from context menu
3.   Click the "Advanced" tab
4.   Click the Environment Variables buttons, under System Variables, find **PATH**, and click the Edit button.

5. In the Edit windows, modify the Variable value by appending a <u>semi colon</u> and then the location of the java bin directory. See the table below for example:

Current	Amended
%SystemRoot%\system32;%SystemRoot%;%SystemRoot%\system32\WBEM;C:\Program Files\Intel\WiFi\bin\;d:\I\bin;d:\I\bin\utils;d:\oe102b;d:\oe102b\bin;D:\MSSQL\90\Tools\binn\	%SystemRoot%\system32;%SystemRoot%;%SystemRoot%\system32\WBEM;C:\Program Files\Intel\WiFi\bin\;d:\I\bin;d:\I\bin\utils;d:\oe102b;d:\oe102b\bin;D:\MSSQL\90\Tools\binn\ **;D:\Java\jdk1.6.0_20\bin**

6. Click OK on all the System Property windows
7. Carry out steps 1 – 5 to establish the script will run (Ensure a new command window is opened)

Running the Script

The scripts are located in the following directory for Orchard Implementer to download:

S:\WorkflowDevelopmentGroup\Omfax\Version 2.0\orchardHousing

1. Ensure the import files folder has been copied onto the D:\ of the Orchard Housing server.
2. Ensure the Orchard Housing environment is running.
3. Open up a command prompt window and navigate to the import folder using the relevant **cd /d** command

Example:

4. Run the installation script **install.bat**, specifying the install Orchard Housing environment's port number as a script argument, looking for any unexpected errors.

   Use the environment table below as a reference for the port numbers:

Application Server	Orchard Housing Live Port Number	Orchard Housing Test Port Number	Orchard Housing Demo Port Number	Orchard Housing Training Port Number
JBOSS	8100	8200	8300	8400
SJSAS	38100	38200	38300	38400
GLASSFISH	38100	38200	38300	38400

For example Installing against an JBOSS Orchard Housing Test environment the command would be:

This script automatically installs Entity Types, Views, Library Functions, Workflow Packages and Case Types **for each** import, the message **SUCCESS** should be seen in the log.

Ignore the **log4j.WARN** messages.

5. When the script has completed the following text will be displayed:

6. If there are errors contact OIS Service Desk, otherwise log into Orchard Housing and regenerate the database.

Regenerating the Database

Login to Orchard Housing using a user that has the admin role:

Home Page > Ctrl + Alt F7 > System > Data Access Service > Highlight Local progress > Regenerate database

Note: Once this has completed you will need to stop and start the app server for the changes to be picked up (see stopping and starting app server section above).

Until these procedures have been carried out the Omfax Integration Solution installation will not be complete. Once complete the solution requires various configuration within the application.

Starting the Application Server

In order for the change to take effect the Application Server will need to be stopped and restarted.

This is done within the Server Console.

Navigate to Clusters > Localhost-cluster1 > Localhost-cluster1-instance1.

To stop the server click the stop button (it should take about 1 minute to stop) you will know when it has stopped successfully because the status will change to stopped and the start button will become available.
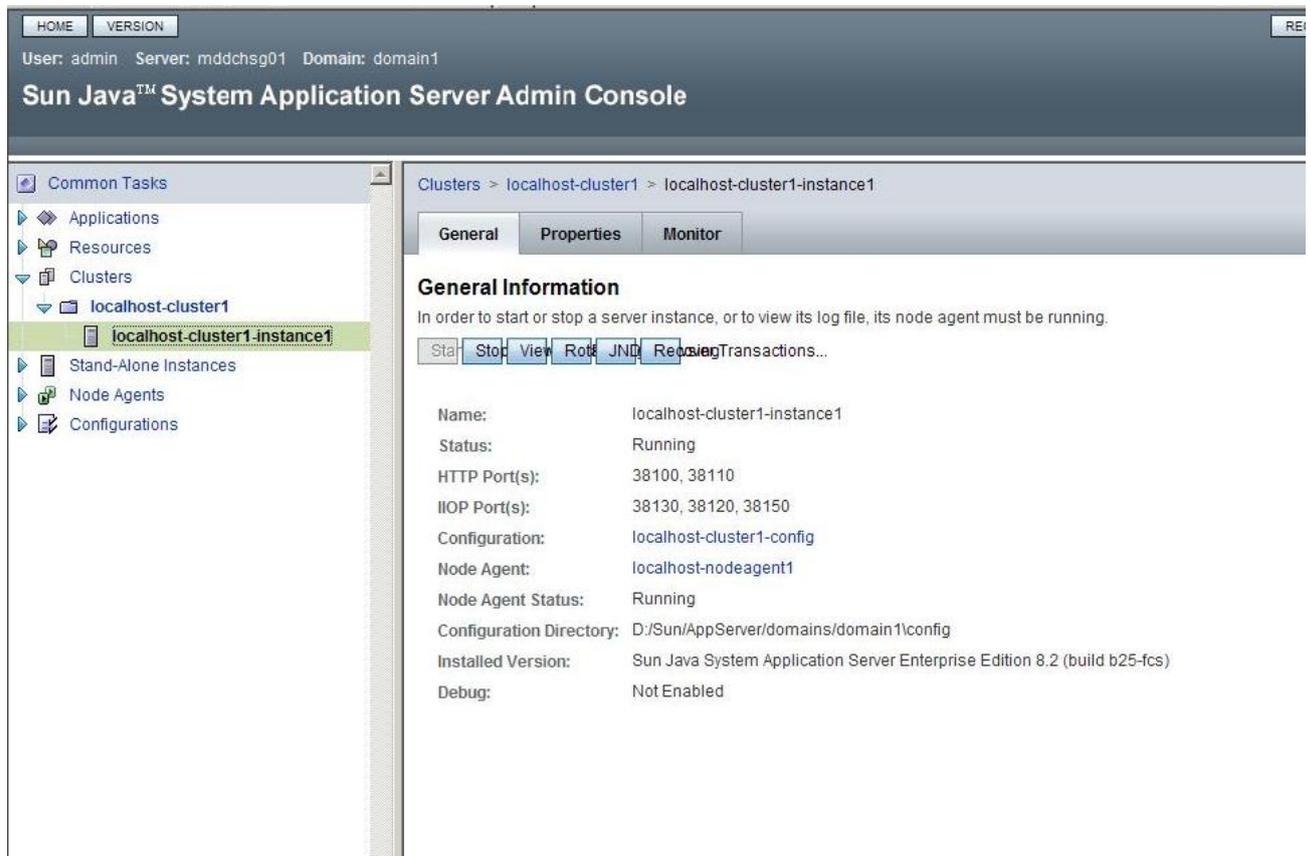
Once it has successfully stopped click start.
This will take a couple of minutes to start. The status will change to running when it has successfully started

Then log out of the Admin console using the logout button and open up Orchard Housing.

Note: As part of the start app server script server side caching might get switched back on. If this is the case, once back in Orchard Housing go to the server side cache button on the launchpad and switch off server side cache

Until these procedures have been carried out the Omfax Integration Solution installation will not be complete. Once complete the solution requires further configuration within the application.

Configuring Entity Data

Launchpad Menu > Maintenance > Entity Data > Entity Type

- Select All Entity Types.
- Highlight the Add Repair XML System.

- Click OK.

The following form will be displayed.

- Click Search.

The following form will be displayed:

- Highlight Keyfax Link Integration Name record.

- Click Update.

The following form will be displayed:

Integration Type

This sets the integration to use and indicates if the integration is active.
The Debug flag shows or hides all the system form fields on the workitem and the writing of all actions to the Java Console.

XML File Integration

These detail the particulars of the XML file construction.

Integration Exe Details

This sets the details of the .exe file that starts Keyfax.

Exe Parameters

Parameters sets all the elements passed in on the command line of the .exe.

Header Details

This determines how the Job Header will be added in Orchard Housing.

Job Event To Add

This determines whether a Job Event is added after the Job has been added.

Job Events Class

Housing Function Menu Admin > Responsive Repairs > System Administration > Job Parameters > Job Event Class

The following Job Event Class needs to be created:

Event Class Code x(3)	Job Event Class Description x(30)	System yes/no	Active? yes/no
JOB	Keyfax Integration	no	yes

Job Events Code

Housing Function Menu Admin > Responsive Repairs > System Administration > Job Parameters > Job Event Code

The following Job Event Class needs to be created:

Event Event Code x(3)	Job Event Code Description x(30)	Event Class x(3)
010	Job Added using Keyfax	JOB

Using the Integration

Launchpad Menu > Main > New Case

The following form will be displayed:

- Select the Case Type EDR Prompt.
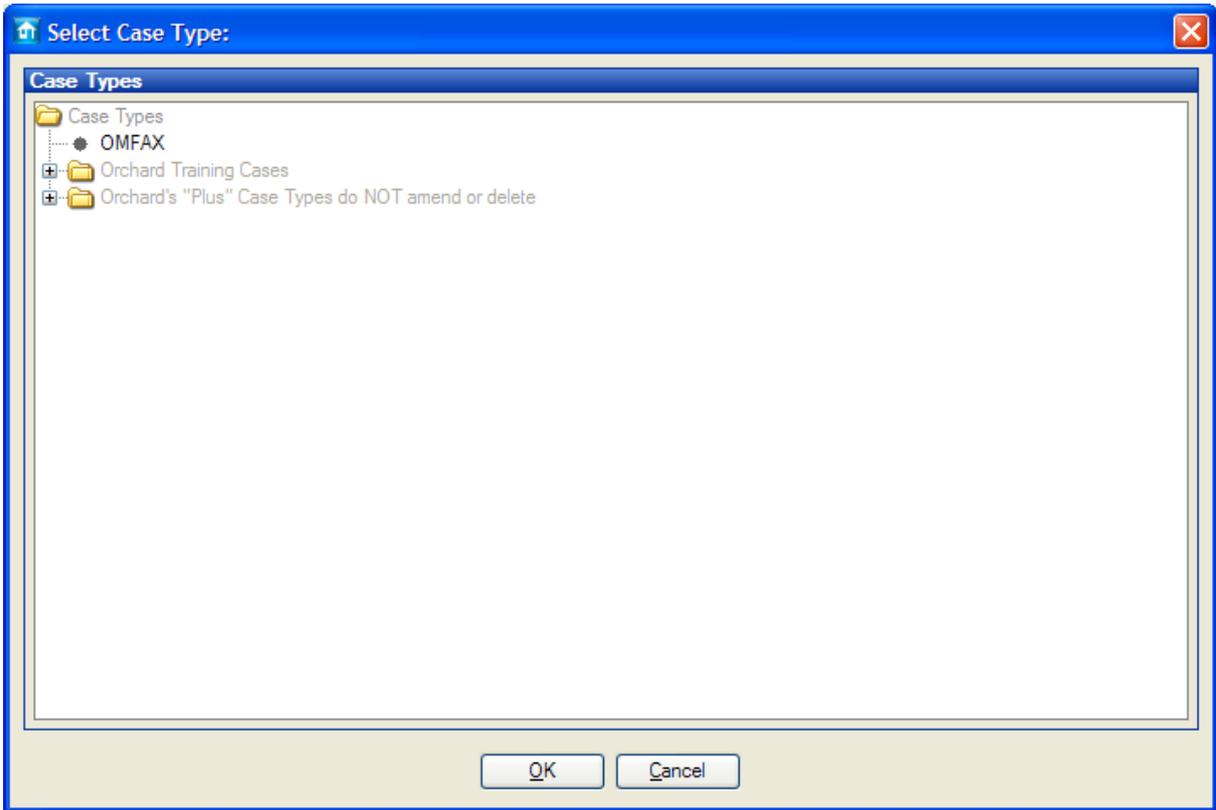
- Select OMFAX.
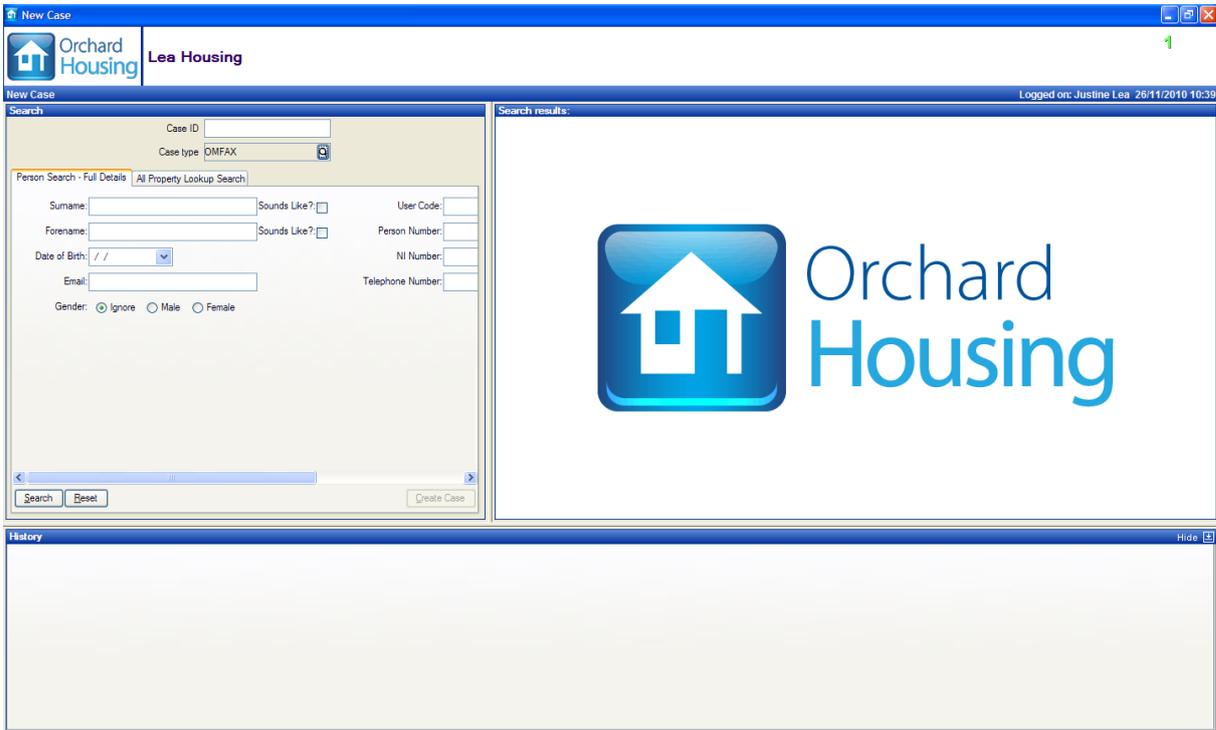
A Person record or Property record will need to be selected before being able to create a Case.

Person Search:

Property Search:

- Once the appropriate Person or Property record has been highlighted click the Search button. This will enable to Create Case button.
- Click Create Case

The opportunity to choose a block property to add the repair to (a person may be ringing to add a repair to a block property not their own) is shown on the first form.

- Select Yes or No as appropriate
- Click Next

The integration subflow opens the integration workitem.

If the New Repair button is selected Keyfax will be launched.

If a repair is not required then the Do Not Create Job and Close Case button can be selected. A reason must be specified for closing the Case.

Diagnose the repair using Keyfax. Once the SOR's have been determined click submit. Keyfax will then close and the message below will appear.

- Click OK

The details of the xml file will populate the repair header.

Note: When caching for the first time there may be a delay.

If you receive an error at this time about not being able to create a job with the date in advance, change the Date/Time field value to a few minutes earlier then try again.
This occurs because there can be a time difference between the Citrix clients and the server so the repair time is in the future by a minute or so.

The calling workflow then continues to the contractor screen followed by contractor appointments, if the contractor has been configured for appointments or in the case of an inspection the inspection appointments screen. These are as the standard workflows.

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