The intelligent choice.

iQ Retail
INTEGRATED ACCOUNTING SOFTWARE

IQ AUTOMATION

25 Quantum Road | Moonstone Building | First Floor | Technopark | Stellenbosch | 7600
Tel: +27 21 880 0420 | Fax: +27 21 880 0488 | Email: info@iqretail.co.za | www.iqretail.co.za
VAT Number: 4760205510 | Company Reg. 2000/020305/07

P R E F A C E

This is the IQ Automation guide for IQ Retail (PTY) Ltd Accounting Software Systems. It will cover in detail, the technical aspects which are applicable to the IQ Enterprise Accounting Software system.

The IQ Automation document will by no means make an expert of you, but it will aid in configuration of the IQ Automation in order for it to function correctly with the IQ Enterprise Accounting Software system.

Although every effort has been made to keep this IQ Automation document up to date, some of the screen examples may not be 100% the same as the ones reflected in previous versions of IQ Automation. This is due to the continuous development and improvement of the IQ System.

Unfortunately, there will be a discrepancy from time to time. We do apologize for the inconvenience that it may cause.

Should you feel that the IQ Automation document is inadequate or requires further explanation or more and better examples, please feel free to email us.

We would love to have some feedback in order to improve the IQ Automation document in some way or another.

Regards,

IQ Retail (PTY) LTD

CONTENTS

INTRODUCTION 6

INSTALLATION OF IQ AUTOMATION 6

SETTING UP IQ AUTOMATION 9
- SERVICE SETUP 9
  - INSTALL 9
  - START 9
  - STOP 10
  - UNINSTALL 10
- EMAIL SERVER SETUP 11
  - SERVER TYPE 12
  - ACCOUNT NAME 12
  - HOST (SMTP) 12
  - USERNAME 12
  - PORT (DEFAULT: 25) 13
  - RETURN E-MAIL 13
  - PASSWORD 13
  - ENCRYPTION 13
  - ACCEPT 13
  - TEST 13
  - BUTTON FUNCTIONALITY 14
- FTP SERVER SETUP 15
  - ACCOUNT NAME 16
  - TRANSFER PROTOCOL 16
  - HOST (FTP) 16
  - PORT (DEFAULT 21) 16
  - USERNAME 16
  - PASSWORD 16
  - ENCRYPTION 16
  - USE PASSIVE MODE FOR FILE TRANSFERS 17
  - OVERRIDE PASSIVE IP (ONLY USE FOR PROBLEMATIC PASSIVE CONNECTIONS) 17
  - USE PROXY 17
  - HOST (PROXY) 17
  - USERNAME 17
  - PASSWORD 17
  - PORT (DEFAULT 3128) 17
  - ACCEPT 18
  - TEST 18
  - BUTTON FUNCTIONALITY 18
- SCHEDULED EVENTS 19
  - SORT ORDER 19
  - COLOUR LEGEND 19
  - DATA INFORMATION 19
  - BUTTON FUNCTIONALITY 20
  - VIEW LAST ERROR 21
  - TEST EVENT 21
  - VIEW LOGS 22

ITEM TYPES 24

SCHEDULED EVENTS USING THE NONE TYPE 24
ITEM TYPE 24

SCHEDULED EVENTS USING THE REPORT TYPE 25
MAIN DETAILS 25
EVENT NAME 25
EVENT ENABLED 25
ITEM TYPE 25
ITEM DATA 26
STOP ITEM AFTER 26
COMPANIES 27
SCHEDULE 28
MAIN 29
ADVANCED 31
ADD 31
EDIT 31
DELETE 31
ACTION 32
MAIN 32
SCHEDULED EVENT FINALISED 38

SCHEDULED EVENTS USING THE SQL SCRIPT TYPE 39
MAIN DETAILS 39
EVENT NAME 39
EVENT ENABLED 39
ITEM TYPE 39
ACTIVE QUERY BUILDER 40
ADVANCED DATABASE UTILITY 41
ITEM DATA 41
STOP ITEM AFTER 41
COMPANIES 42
SCHEDULE 43
MAIN 44
ADVANCED 46
ADD 46
EDIT 46
DELETE 46
ACTION 47
MAIN 47
SCHEDULED EVENT FINALISED 54

SCHEDULED EVENTS USING THE PROCESS TYPE 55
MAIN DETAILS 55
EVENT NAME 55
EVENT ENABLED 55
ITEM TYPE 55
ITEM DATA 56
STOP ITEM AFTER 56
COMPANIES 56
SCHEDULE 57
MAIN 58

ADVANCED 59
ADD 60
EDIT 60
DELETE 60
ACTION 61
MAIN 61
SCHEDULED EVENT FINALISED 65

SCHEDULED EVENTS USING THE IQ XML EXPORTS TYPE 66
MAIN DETAILS 66
EVENT NAME 66
EVENT ENABLED 66
ITEM TYPE 66
ITEM DATA 66
STOP ITEM AFTER 66
COMPANIES 67
SCHEDULE 68
MAIN 69
ADVANCED 70
ADD 71
EDIT 71
DELETE 71
ACTION 71
MAIN 72
SCHEDULED EVENT FINALISED 73

SCHEDULED EVENTS USING THE IQ XML IMPORTS TYPE 74
MAIN DETAILS 74
EVENT NAME 74
EVENT ENABLED 74
ITEM TYPE 74
ITEM DATA 75
STOP ITEM AFTER 75
COMPANIES 75
SCHEDULE 76
MAIN 77
ADVANCED 78
ADD 78
EDIT 78
DELETE 78
ACTION 79
MAIN 79
SCHEDULED EVENT FINALISED 81

REPORTS 82
EVENT LOG 82
BUTTON FUNCTIONALITY 82
OUTSTANDING ACTIONS LOG 83
EMAIL LOG 84

IQ AUTOMATION

INTRODUCTION

The IQ Report Server has been renamed to IQ Automation. This software runs as a System Service independent of a specific user profile.

IQ Automation is a service based scheduling application that provides the user with the ability and flexibility or preparing, organizing and distributing relevant data.

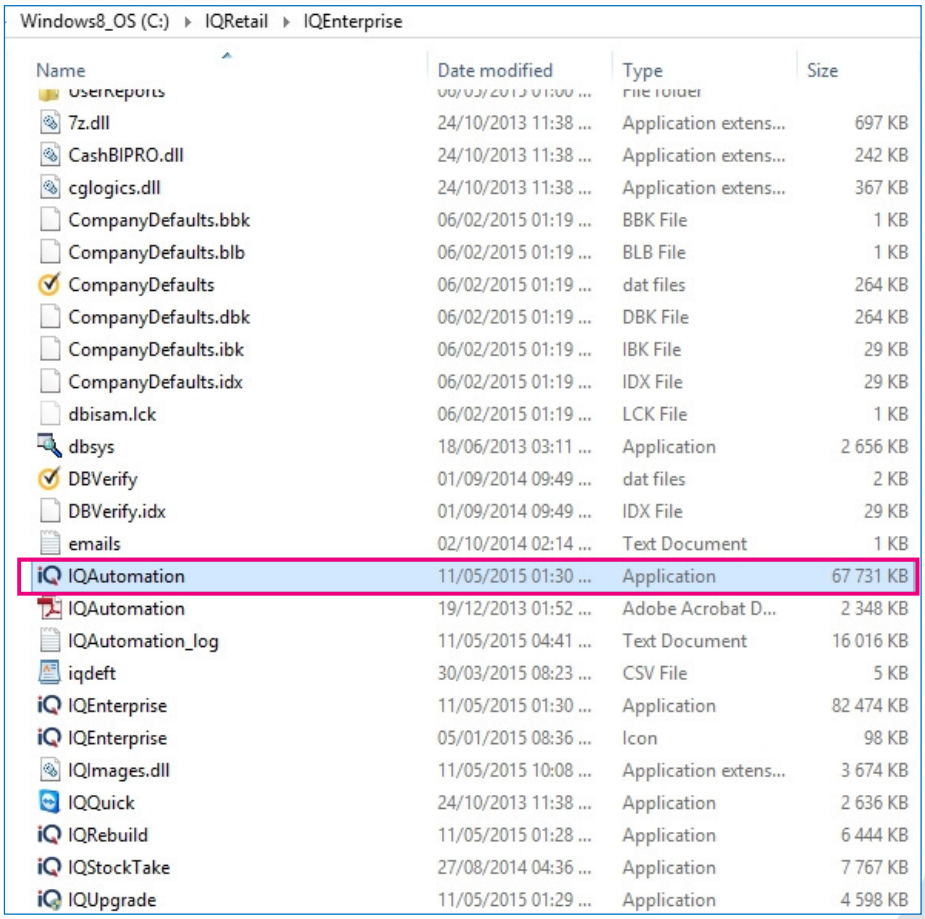
The service allows for the automation of various actions including:

- Report Generation
- Data Generation
- Emailing
- FTP
- Imports and Exports

NOTE: IQ Automation is only accessible by users with Administrators' access.

INSTALLATION OF IQ AUTOMATION

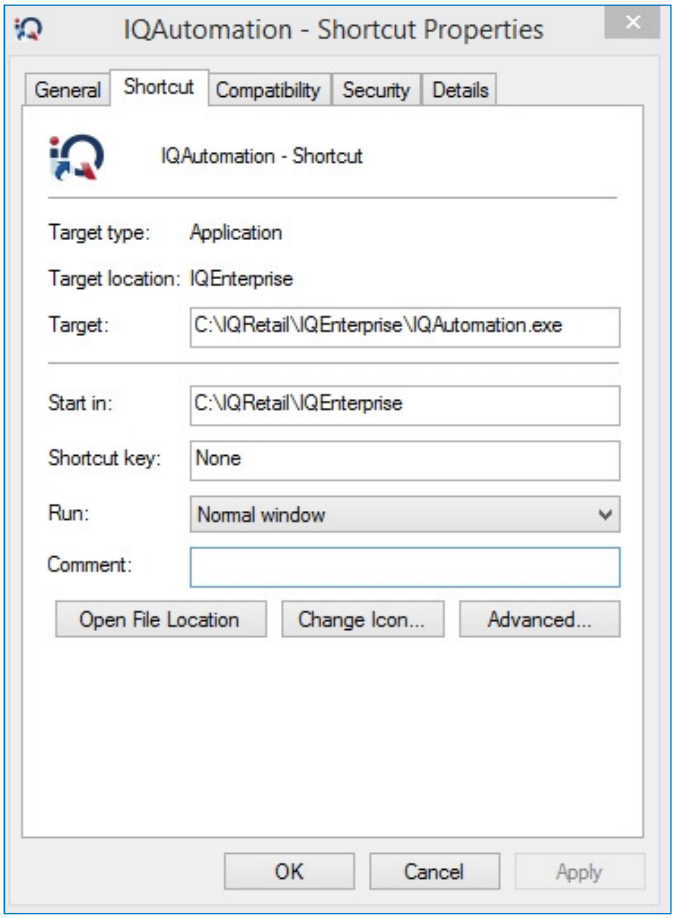
IQ Automation is automatically installed onto the server when IQ Enterprise is installed. It usually starts up together with the IQ Registration services.



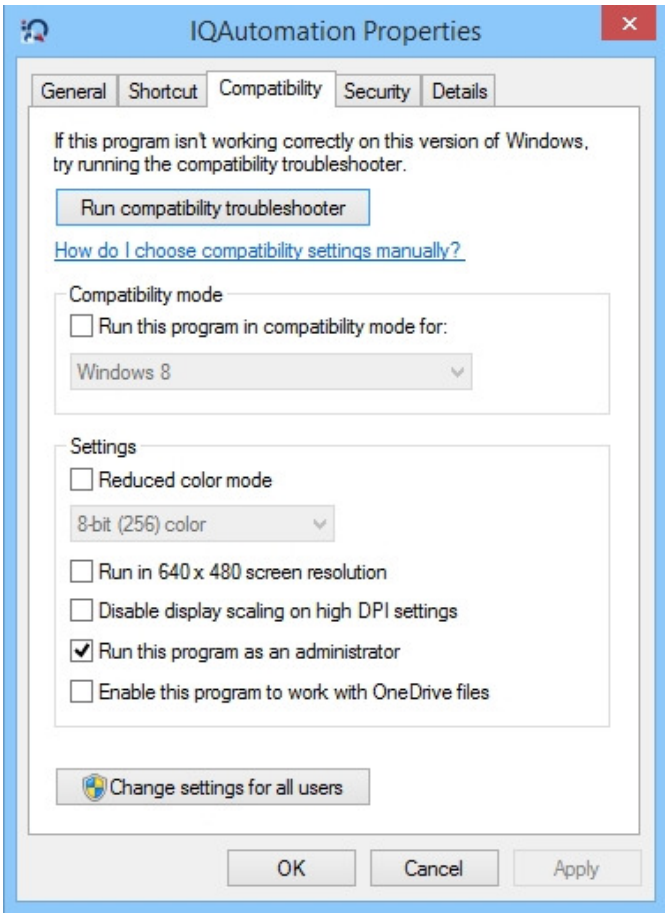
The user needs to create a shortcut on the server, using the unique target, to log into IQ Automation.

Right click on the IQ Automation.exe (application) file and send the shortcut to the desktop.

Right click on the icon which was sent to the desktop and click on properties.

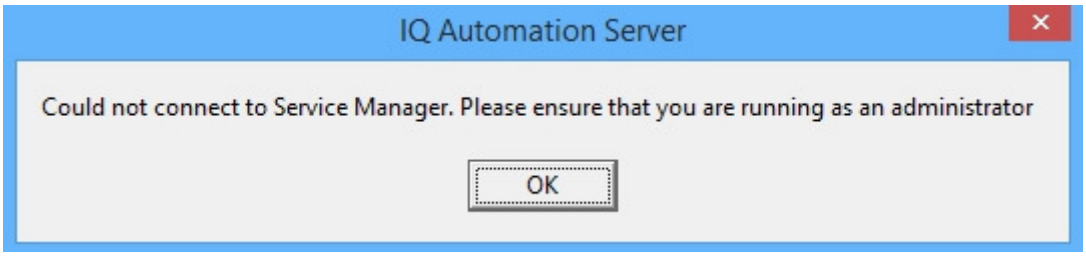


Select the compatibility tab and tick the block next to "Run this program as an administrator". This will allow the user to Stop, Start, Install or Uninstall IQ Automation.

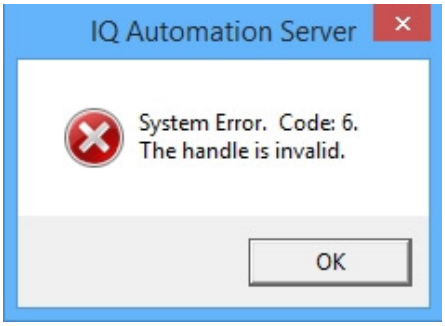


Select the Apply and OK buttons to save the changes made.

NOTE: If IQ Automation is not set to Run as Administrator, messages will appear to tell that the user could not connect to the Service Manager.



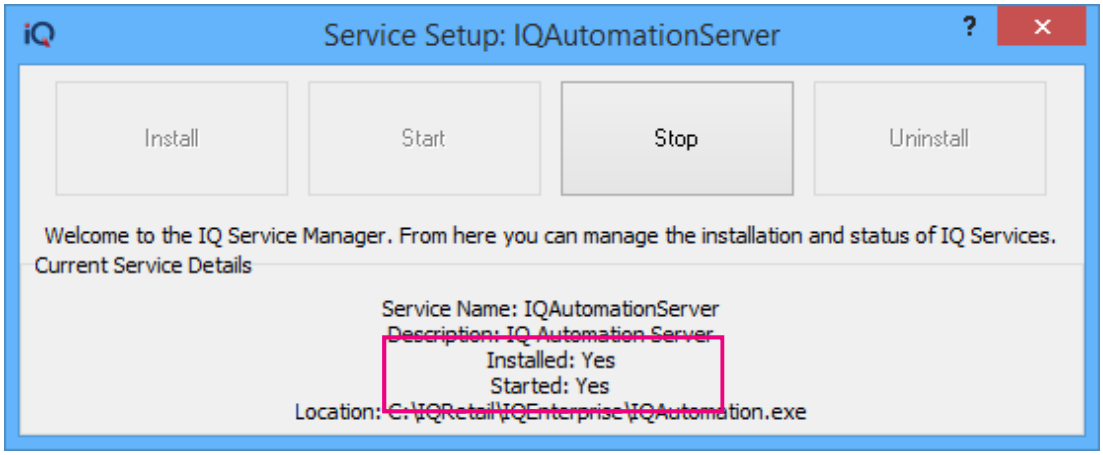
The user will not be able to Start, Stop, Uninstall or Install IQ Automation. System error messages will appear.



SETTING UP IQ AUTOMATION

SERVICE SETUP

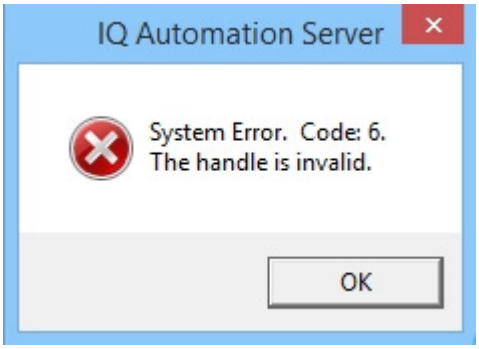
Select the Service Setup option at the top of the IQ Automation screen in order to setup and maintain the IQ Automation Service. Once the Service Setup option has been selected, a dialogue box will appear.



INSTALL

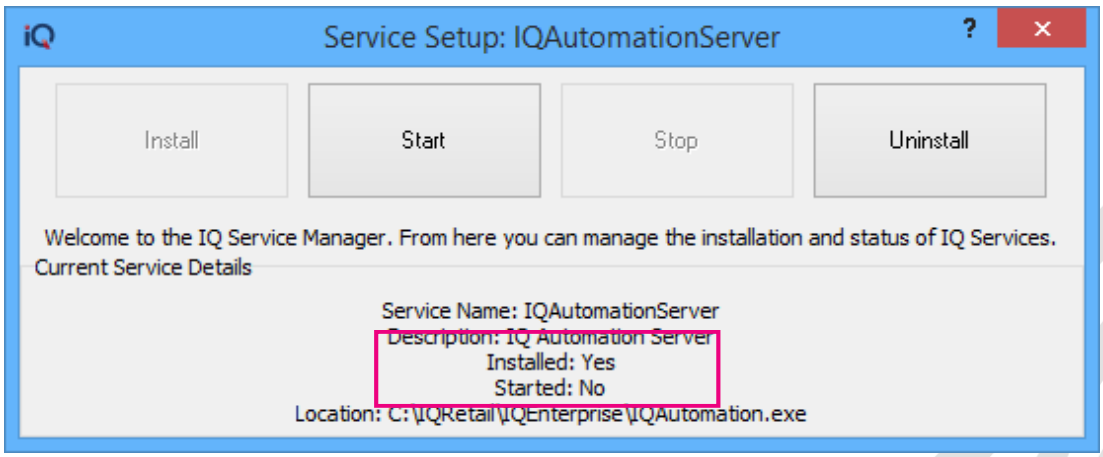
Select the Install function.

NOTE: IQ Automation can only be installed once. The information box will indicate if the IQ Automation Server has been installed. Trying to install IQ Automation again will result in an error message.

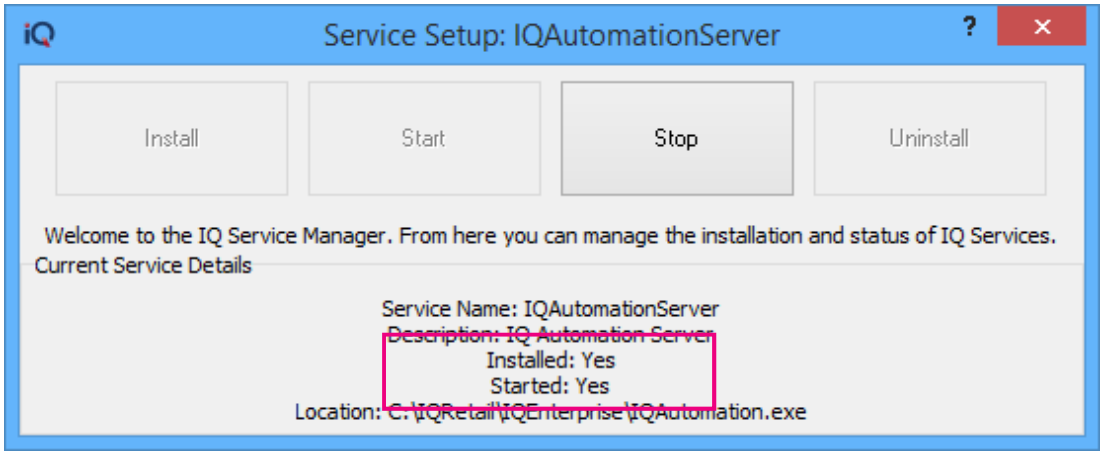


START

The Start option allows the user to start the service once it has been installed.



Once the IQ Automation Service has been installed, the next step is to start the service. Select the Start function.



Once the IQ Automation Service has been started, the user can setup the email and ftp servers and setup scheduled tasks.

STOP

The Stop function allows the user to stop the IQ Automation service at any time. Doing this will also stop all scheduled events from processing.

NOTE: The IQ Automation Service must be running in order for scheduled events to take place.

An example for when the user would want to stop the IQ Automation Service, would be to make a quick backup or to restore data. The user will just have to remember to re-start the service, once the backup or restore is finished.

UNINSTALL

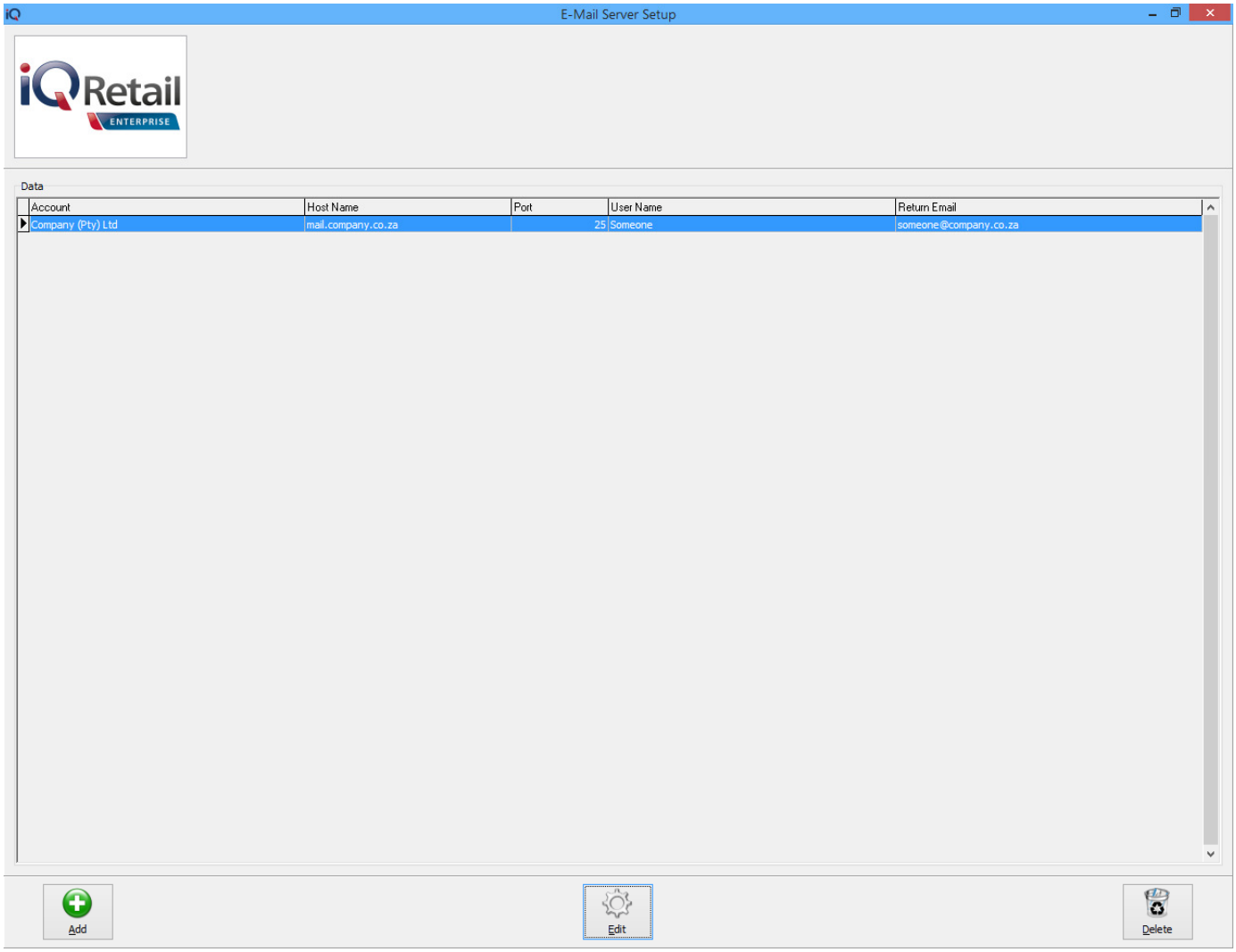
The uninstall function allows the user to uninstall the IQ Automation Service. The service first needs to be stopped, before the user can uninstall it.

NOTE: Remember that if the IQ Automation Service is uninstalled, the scheduled events will no longer function correctly. The IQ Automation Service must be installed and running in order for scheduled events to function correctly.

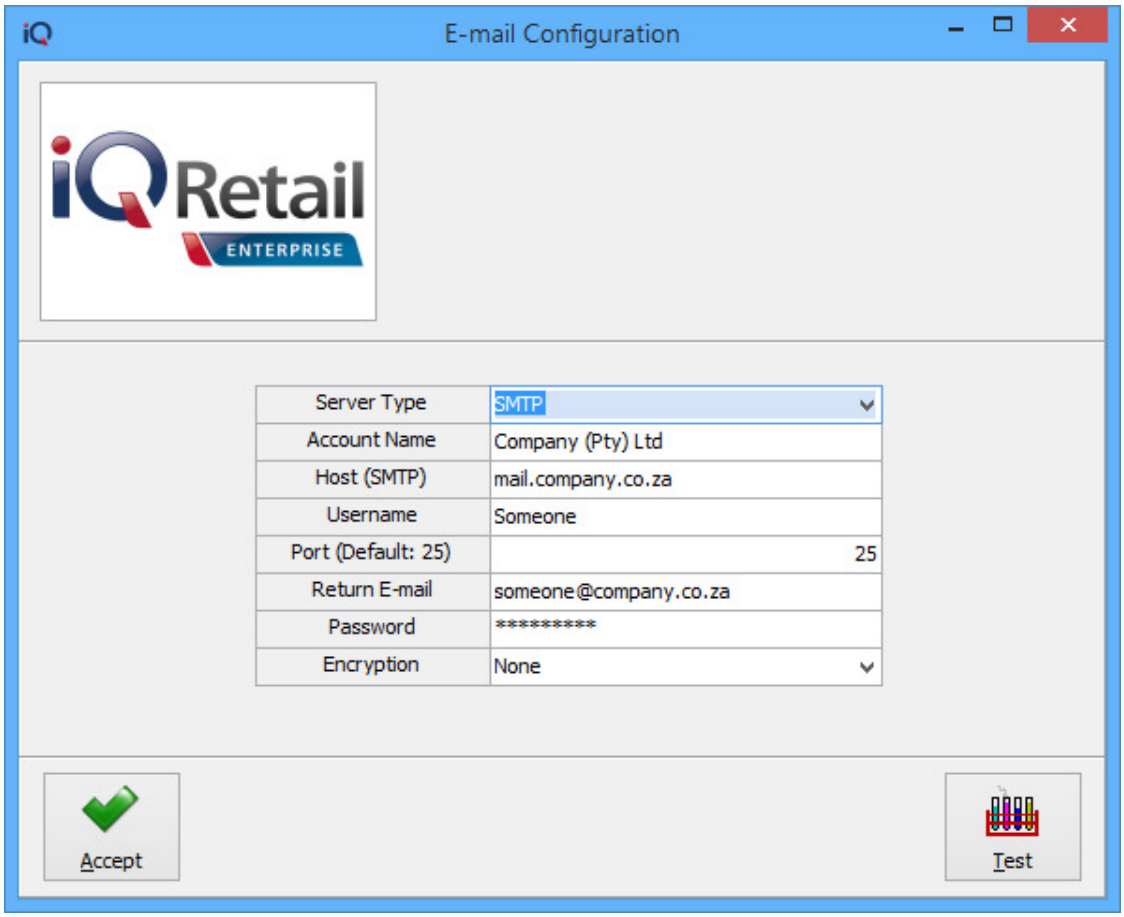
An example for when the user would want to stop the IQ Automation Service and uninstall it would be when a company was incorrectly created and needs to be deleted.

EMAIL SERVER SETUP

The user needs to configure the email server in order for the IQ Automation Service to send reports from the scheduled events via email using the email configuration that has been created. These configurations must be created before events are scheduled, otherwise the IQ Automation Service will not be able to use this function.



Select the Add option to create the configuration of the email server.



SERVER TYPE

There are three server types to choose from: (click on the down arrow to select one server type)

SMTP

Simple Mail Transfer Protocol is an internet standard for electronic mail (e-mail) transmission.

POP3

POP3 is the most common account type for personal e-mail. Messages are typically deleted from the server when you check your e-mails.

IMAP

Internet Message Access Protocol (IMAP) servers let you work with e-mail messages without downloading them to your computer first.

ACCOUNT NAME

The Account Name field is a descriptive name used to identify the email server you are currently configuring.

HOST (SMTP)

The Host (Simple Mail Transfer Protocol) field is where the hostname of the outgoing mail server is entered. The hostname is the name of the server that is used to send email.

USERNAME

The Username field is where the Username for the host server is entered. This username is the name that is used to authenticate against the host email server.

PORT (DEFAULT: 25)

The Default Port field is the default port that is used for sending emails. By default the port that the email server is listening on, is port 25.

RETURN E-MAIL

The Return Email field is where the return email is entered. This email address is the address that the recipient will reply to.

PASSWORD

The Password field is where the password is entered for the mail server. This password together with the username authenticates against the outgoing email server.

ENCRYPTION

Encryption is the conversion of data into a form, called a "cipher text" that cannot be easily understood by unauthorized people.

NONE

If the message should not be encrypted, the user can click on None.

STARTTLS

STARTTLS is an extension to plain text communication protocols, which offers a way to upgrade a plain text connection to an encrypted (TLS or SSL) connection instead of using a separate port for encrypted communication.

TLS

TLS was released in response to the Internet community's demands for a standardized protocol. The protocol allows client/server applications to communicate in a way that is designed to prevent eavesdropping, tampering or message forgery.

SSL

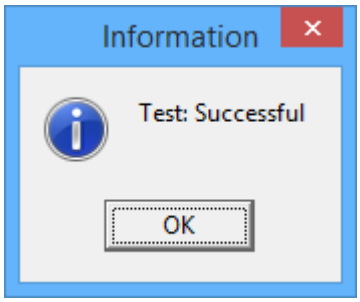
SSL is the secure communications protocol of choice for a large part of the Internet community.

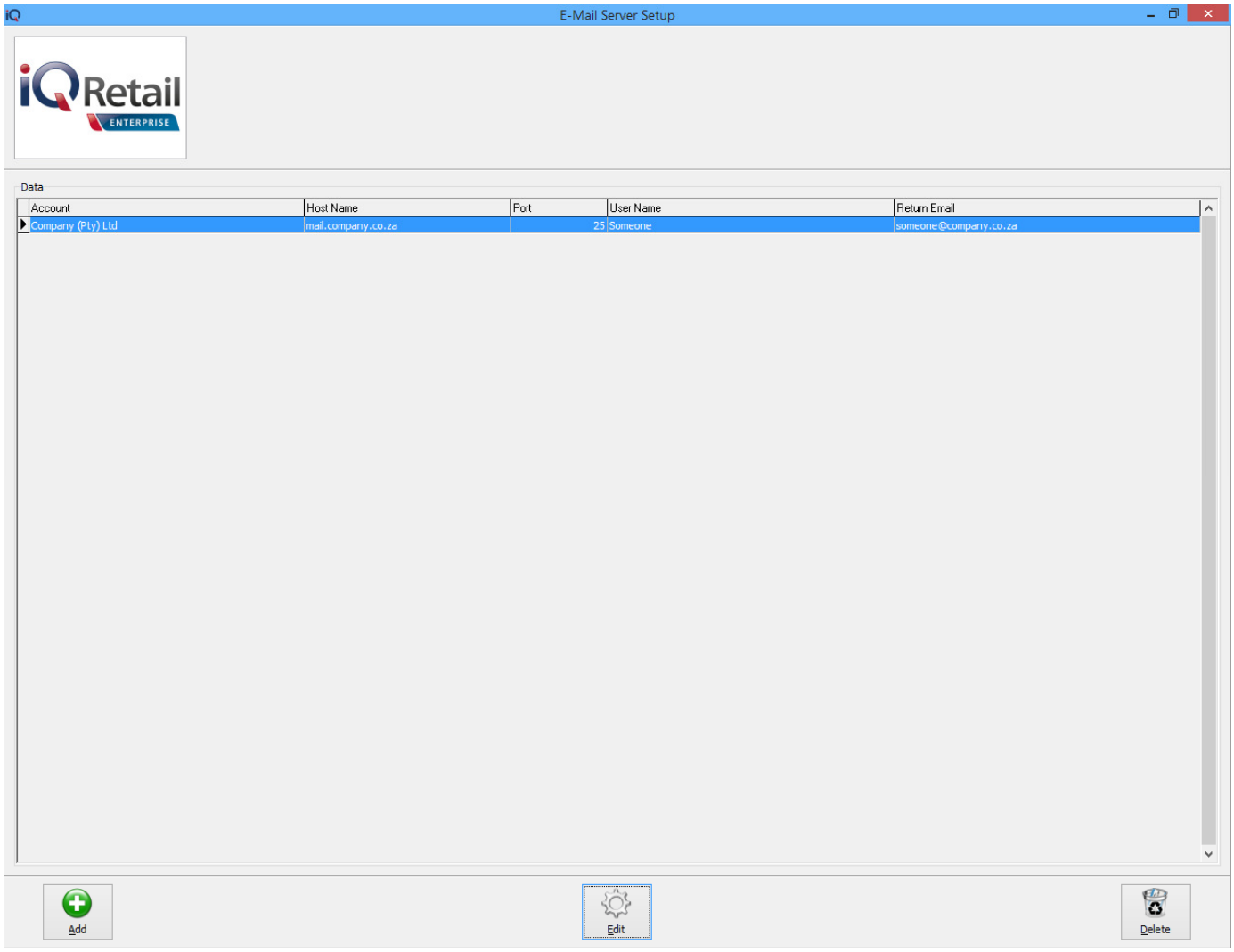
ACCEPT

Select the Accept option to save the information that has been entered.

TEST

The Test option allows the user to test the current settings that have been entered. If no errors are present, then the configuration is correct and the user will get a message stating that the test was successful.





BUTTON FUNCTIONALITY

ADD

Select the Add option if any additional email servers need to be configured.

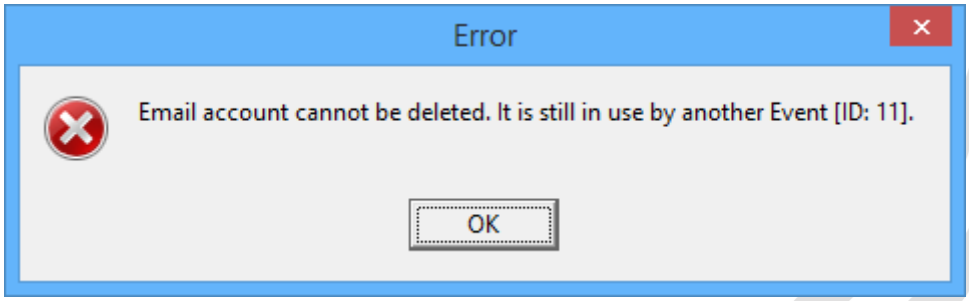
EDIT

Select the Edit option if changes need to be made to any of the existing email server setups.

DELETE

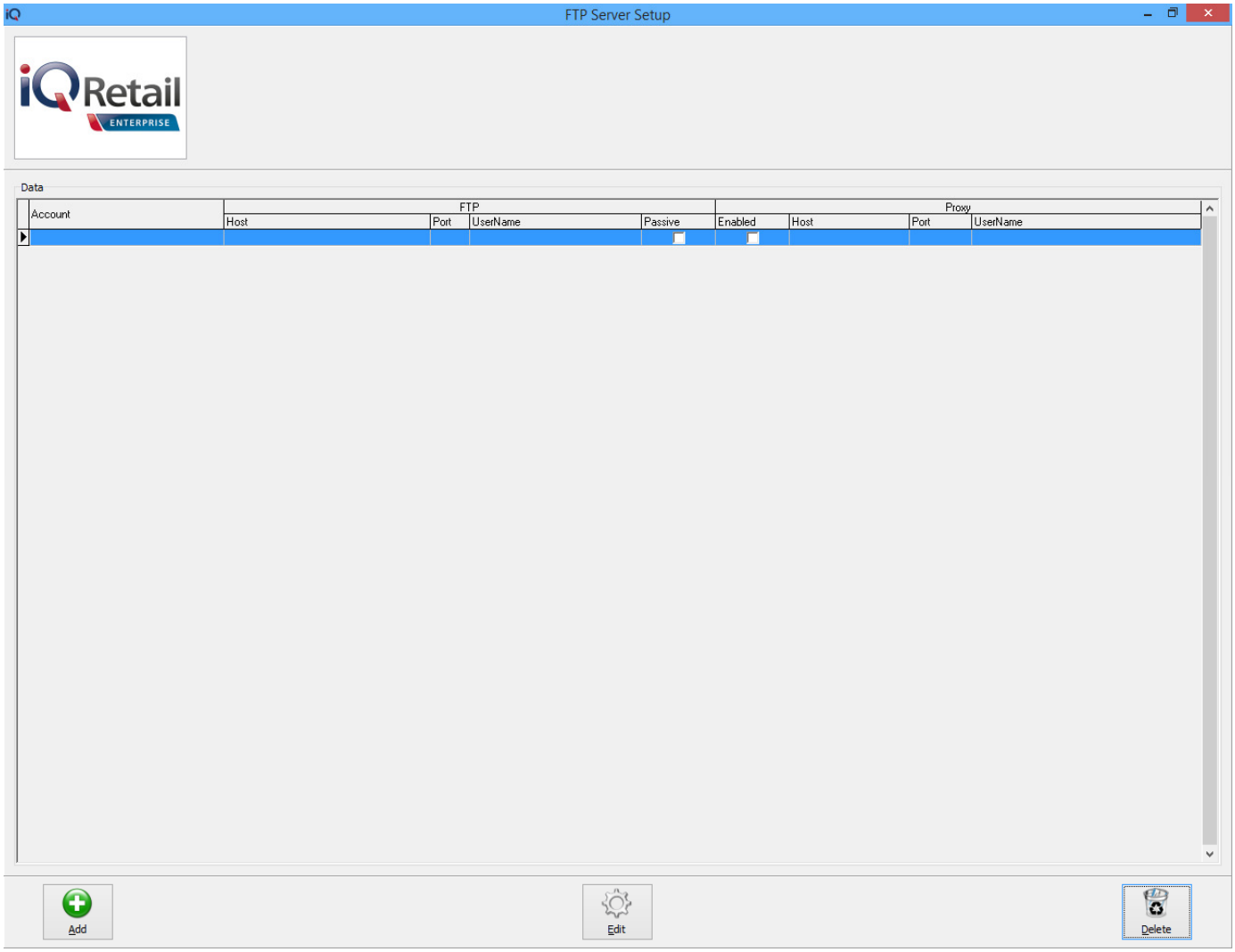
Select the Delete option if any of the existing email server configurations should be deleted. By selecting the delete button, a confirmation box will appear. If the "**YES**" option is selected, the selected email configuration will be permanently deleted.

NOTE: Email accounts can't be deleted if they are still being used by one of the events.

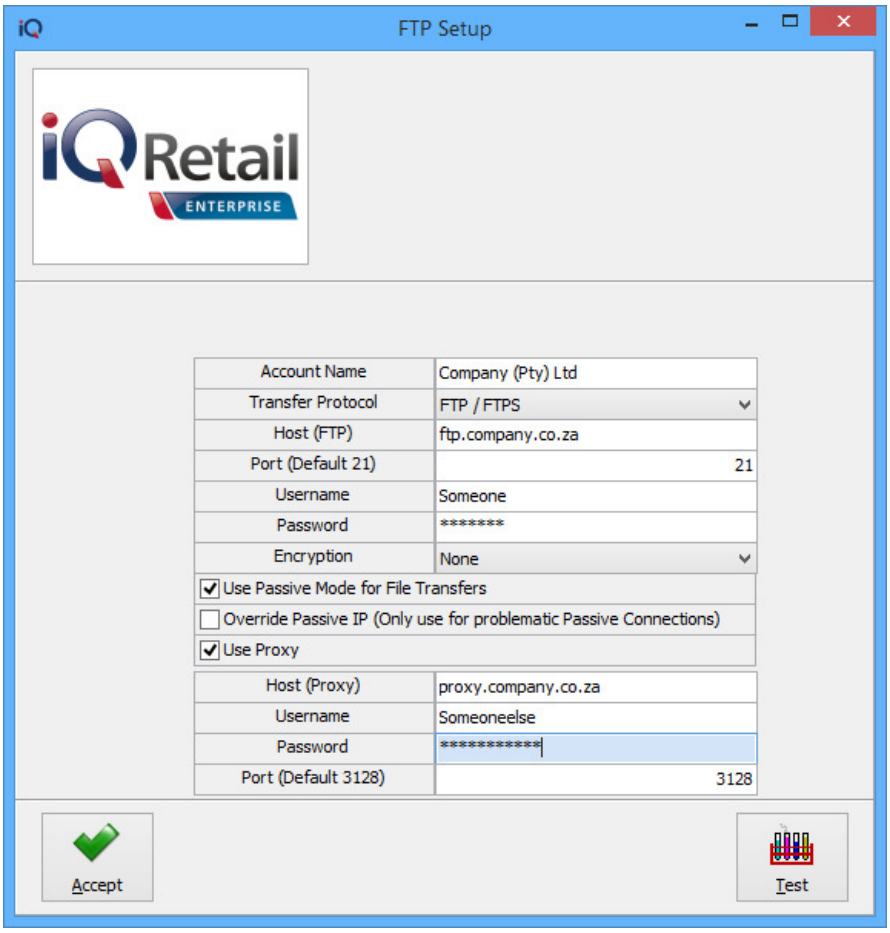


FTP SERVER SETUP

The next step is to configure the FTP Server. By setting up the FTP Server the IQ Automation Service allows the user to choose where to save information to, when creating events.



Select the Add option to configure and add the FTP server.



ACCOUNT NAME

The Account Name field is a descriptive name used to identify the ftp server the user is currently configuring.

TRANSFER PROTOCOL

The user has the option to choose between FTP/FTPS or SFTP (FTP via SSH). Select the required option from the drop down menu.

HOST (FTP)

The Host (File Transfer Protocol) field is where the hostname of the ftp server is entered. The hostname is the name of the server that is used to transfer data to and from.

PORT (DEFAULT 21)

The default port for an ftp server is port 21. This is the port that will be used to transfer data. By default the port that the ftp server is listening on, is port 21.

USERNAME

The Username field is where the username for the ftp server is entered. This username is the name that is used to authenticate against the host ftp server.

PASSWORD

The Password field is where the password is entered for the ftp server. The password together with the username authenticates against the host ftp server.

ENCRYPTION

Encryption is the conversion of data into a form, called a "cipher text" that cannot be easily understood by unauthorized people.

NONE

If the message should not be encrypted, the user can click on None.

STARTTLS

STARTTLS is an extension to plain text communication protocols, which offers a way to upgrade a plain text connection to an encrypted (TLS or SSL) connection instead of using a separate port for encrypted communication.

TLS

TLS was released in response to the Internet community's demands for a standardized protocol. The protocol allows client/server applications to communicate in a way that is designed to prevent eavesdropping, tampering or message forgery.

SSL

SSL is the secure communications protocol of choice for a large part of the Internet community.

USE PASSIVE MODE FOR FILE TRANSFERS

Tick the box next to this option if the passive mode for file transfers needs to be used. The Passive FTP option involves the FTP PASV command. The PASV (passive) is a more secure form of data transfer in which the flow of data is set up and initiated by the File Transfer Program FTP Client rather than by the FTP Server program. Most Web browsers (which act as FTP clients) use passive FTP by default because it's preferred as a safety measure.

OVERRIDE PASSIVE IP (ONLY USE FOR PROBLEMATIC PASSIVE CONNECTIONS)

This option, if enabled, will override the Passive IP to ensure a stable connection.

USE PROXY

Tick the box next to the Use Proxy option to enable the proxy. A proxy server is a server that acts as an intermediary between a workstation user and the Internet, so that the company can ensure security, administrative control and a caching service. A proxy server is associated with or part of a gateway server that separates the company network from the outside world and a firewall that protects the company's network from outside intrusion.

HOST (PROXY)

The host proxy server will be the server that any internet connections would go through in order to access the World Wide Web and for processing scheduled events within the IQ Automation Service. Enter the details of the proxy server.

USERNAME

The Username field is where the Username for the proxy server is entered. The username is the name that is used to authenticate against the proxy server.

PASSWORD

The Password field is where the password for the proxy server is entered. This password together with the username authenticates against the proxy server.

PORT (DEFAULT 3128)

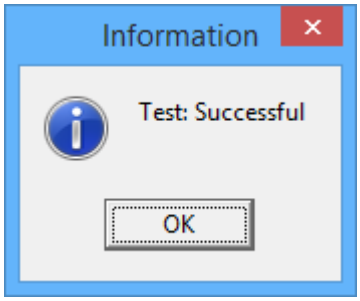
The Port field displays the default port that is used for any workstation to access the World Wide Web via the proxy server. By default the port that the proxy server is listening on, is port 3128.

ACCEPT

Select the Accept option to save the information that has been entered.

TEST

The Test option allows the user to test the current settings that have been entered. If no errors are present, the configuration is correct and the user will get a message stating that the test was successful.



BUTTON FUNCTIONALITY

ADD

Select the Add option if any additional ftp servers need to be configured.

EDIT

Select the Edit option if changes need to be made to any of the existing ftp server setups.

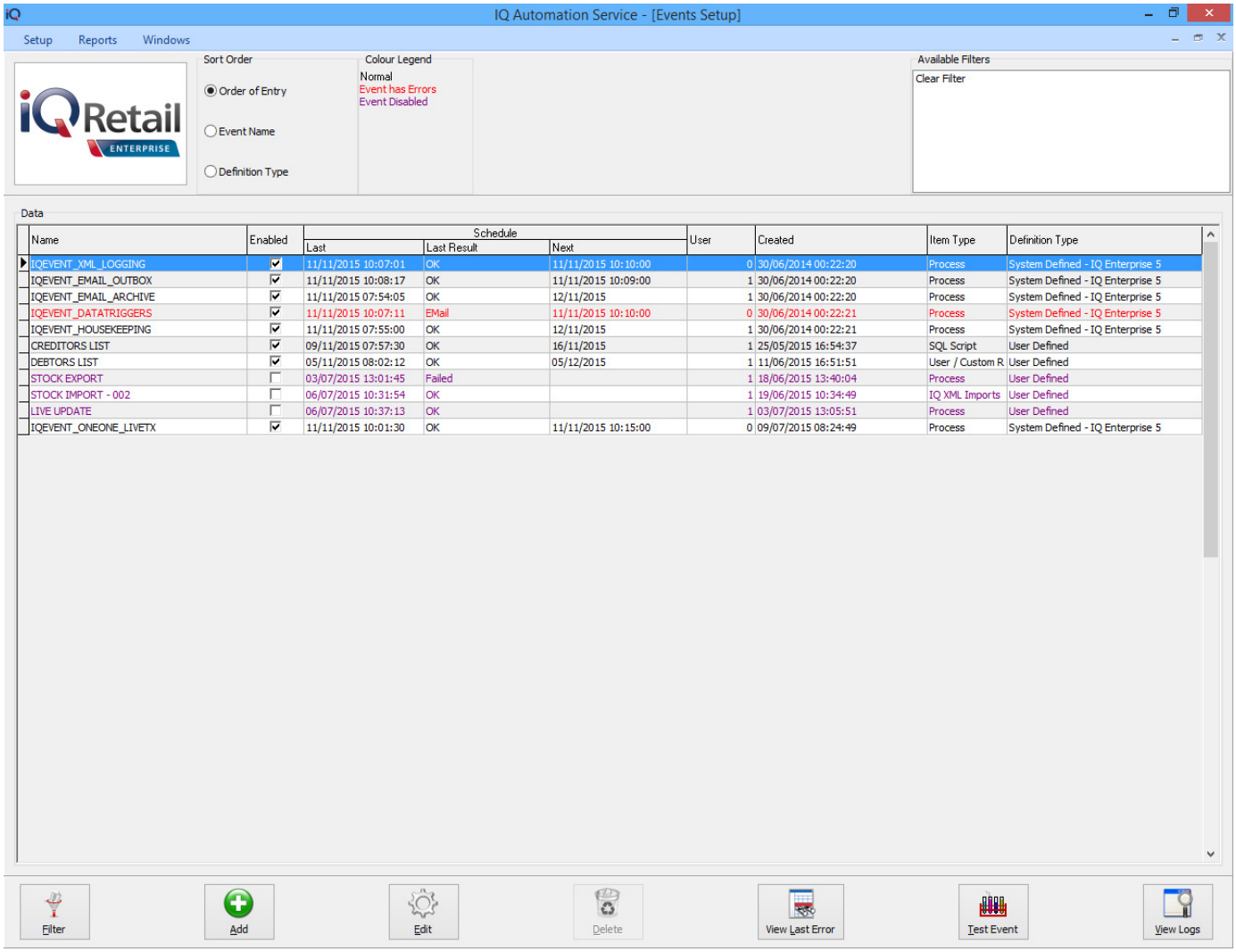
DELETE

Select the Delete option if any of the existing email server configurations should be deleted. By selecting the delete button, a confirmation box will appear. If the "**YES**" option is selected, the selected email configuration will be permanently deleted.

SCHEDULED EVENTS

Scheduling an event allows the user to setup and create specific events that will occur on a specified date and time. These events can either generate a report, execute SQL Queries, run processes, import or export IQ XML files.

IMPORTANT: When using the "**1-Report**" option to generate reports via the scheduled event, these reports may **NOT** contain any dialogue boxes.



NOTE: The setup of events displayed on the screen above have been completed.

SORT ORDER

The Sort Order allows the user to change the sequence of the data displayed on the screen.

COLOUR LEGEND

Colour legends indicate if **events** are Normal, Has Errors or Disabled.

DATA INFORMATION

NAME

This is the Name of the event.

ENABLED

The tick in the enabled box will indicate if the event is enabled or disabled.

SCHEDULE

LAST

The last date and time the event was processed.

LAST RESULT

The Last Result will indicate if the event was processed successfuly or not. OK indicates that there were no errors and the event was processed correct.

NEXT

The next date and or time the event is scheduled to be processed again.

USER

User 0 is the System defined events and user 1 will be the events set up by the administrator.

CREATED

The date and time the selected event was created.

ITEM TYPE

The user has the option to select one of 6 item types:

0 – None

1 – User / custom Reports

2 – SQL Scripts

3 – Process

4 – IQ XML Export

5 – IQ XML Import

DEFINITION TYPE

IQ Automation Events can now be of User Defined Type or of System Generated Type. These types are displayed on the display grid. IQ Automation is used by the IQ Enterprise family of packages for system automated events. These events will be added automatically by the IQ system and will be scheduled with default values.

BUTTON FUNCTIONALITY

FILTER

The filter option allows the user to filter for specific information on the Events Setup Screen.

ADD

Select the add option to add any additional events that need to be scheduled.

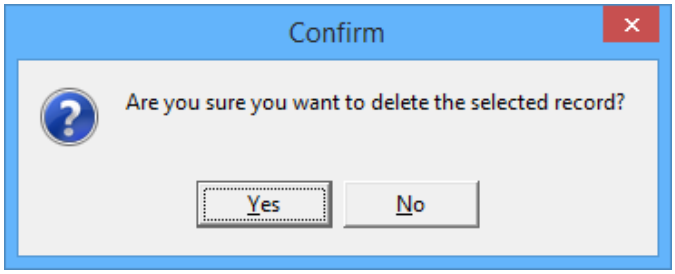
EDIT

Select the Edit option if any changes need to be made to any of the existing scheduled events.

NOTE: Editing of System defined Events will provide limited updating options.

DELETE

Select the Delete option if any of the existing scheduled events should be deleted. By selecting the delete button, a confirmation box will appear.



If the "**YES**" option is selected, the selected event will be permanently deleted from the system.

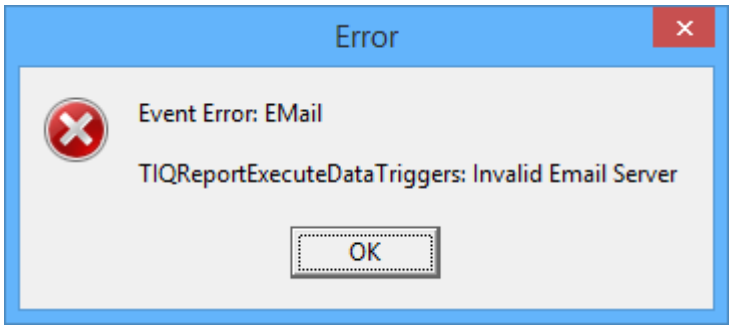
NOTE: Users will not be allowed to Delete System Defined Events.

VIEW LAST ERROR

The View Last Error allows the user to see a detailed description of the errors if the test option failed. Select an event that is listed is red on the Events Setup screen and click on the View Last Error button.

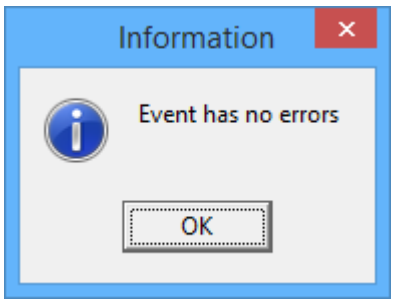
This will also display detailed error results if the error was caused by the actual event that encountered an error - NOT only when using the test button.

Example of error message:



TEST EVENT

The Test Event option allows the user to test the currently selected scheduled event. If the scheduled event has been setup correctly, the system will return a dialogue box, stating "Event has no Errors".



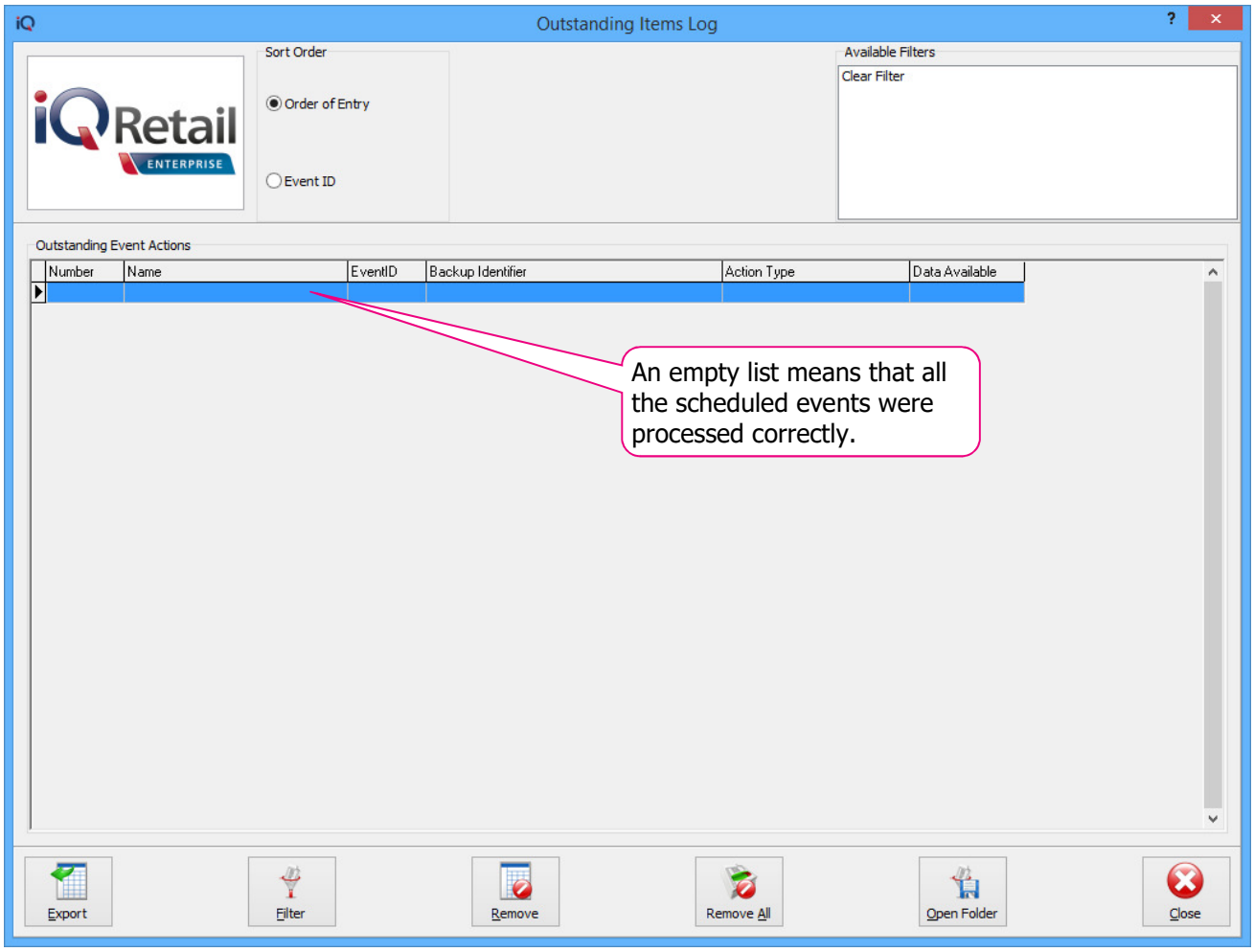
The system will also execute the event and email the report, ftp it, or print it, as the actions were setup.

VIEW LOGS

The IQ Automation service keeps a log of all the scheduled events which didn't execute correctly and is able to provide the user with a list of all these failed events, as well as a reason therefore.

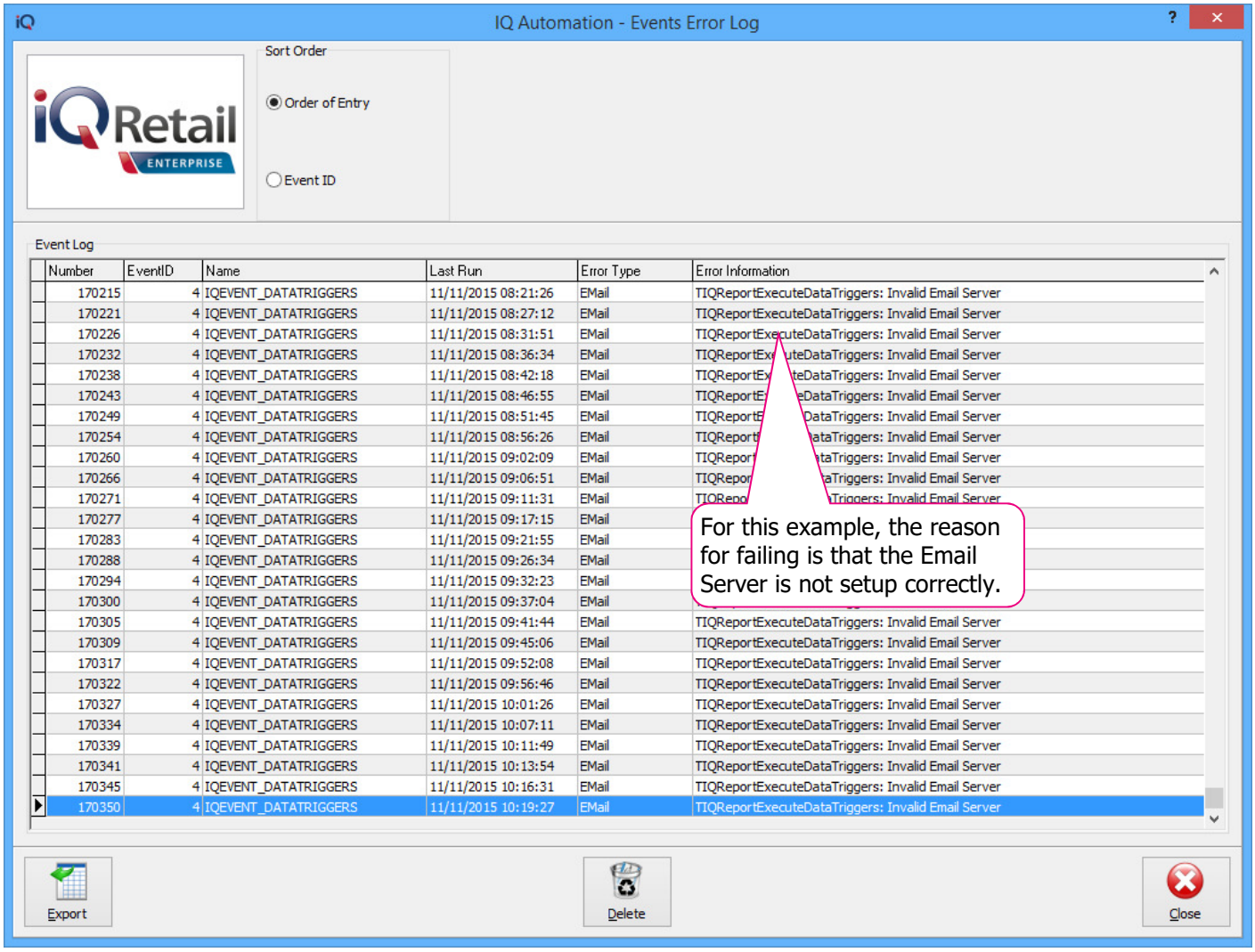
OUTSTANDING ACTIONS

The IQ Automation service is able to provide the user with a list of all outstanding events. In other words all the sheduled events that didn't execute correctly.



VIEW EVENT LOGS

The IQ Automation service is able to provide the user with a list of events, everytime the selected event failed, as well as reasons for the failure.



ITEM TYPES

Scheduling an event allows the user to setup and create specific events that will occur on a specified date and/or time. The events can either generate reports, execute SQL queries, run processes, import or export IQ XML files.

SCHEDULED EVENTS USING THE NONE TYPE

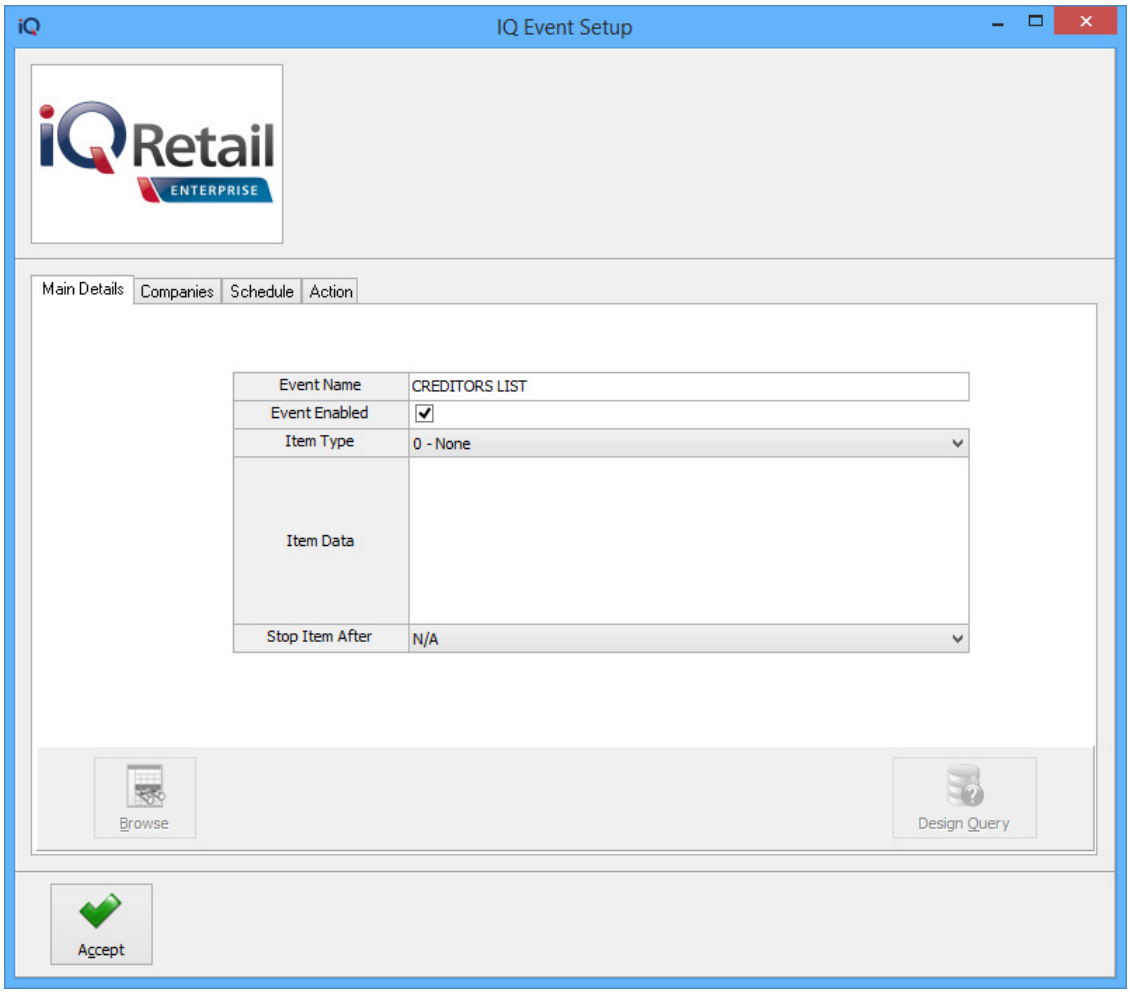
In order to add or edit a scheduled event, select the Add/Edit option.

IMPORTANT: The **NONE** item type allows the user to disable any scheduled event at any given time.

ITEM TYPE

The item type option allows the user to pick from 6 types; **0-None**, 1-User/Custom Report, 2-SQL Script, 3-Process, 4-IQ XML Exports and 5- IQ XML Imports.

NOTE: When the **None** option is used to disable an event, some information can be lost, where as if a scheduled event is deleted, all information will be lost.

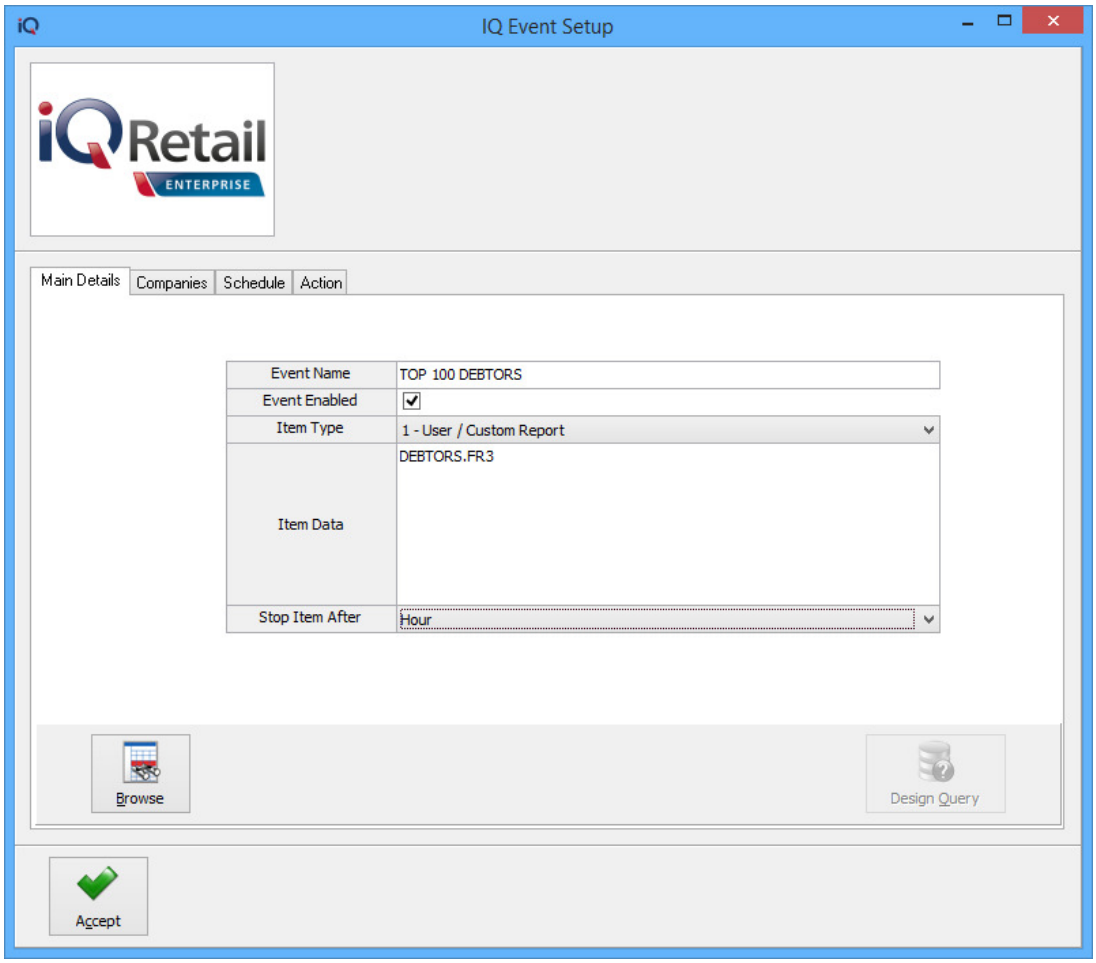


To disable an event, select the None item type and click on the Accept button on the bottom of the screen.

SCHEDULED EVENTS USING THE REPORT TYPE

In order to add a scheduled event, select the Add option.

IMPORTANT: When using the "**1-User / Custom Report**" option to generate reports via the scheduled events, these reports may **NOT** contain any dialogue boxes.



MAIN DETAILS

EVENT NAME

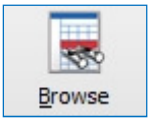
The event name is where the user gives the specific event a name.

EVENT ENABLED

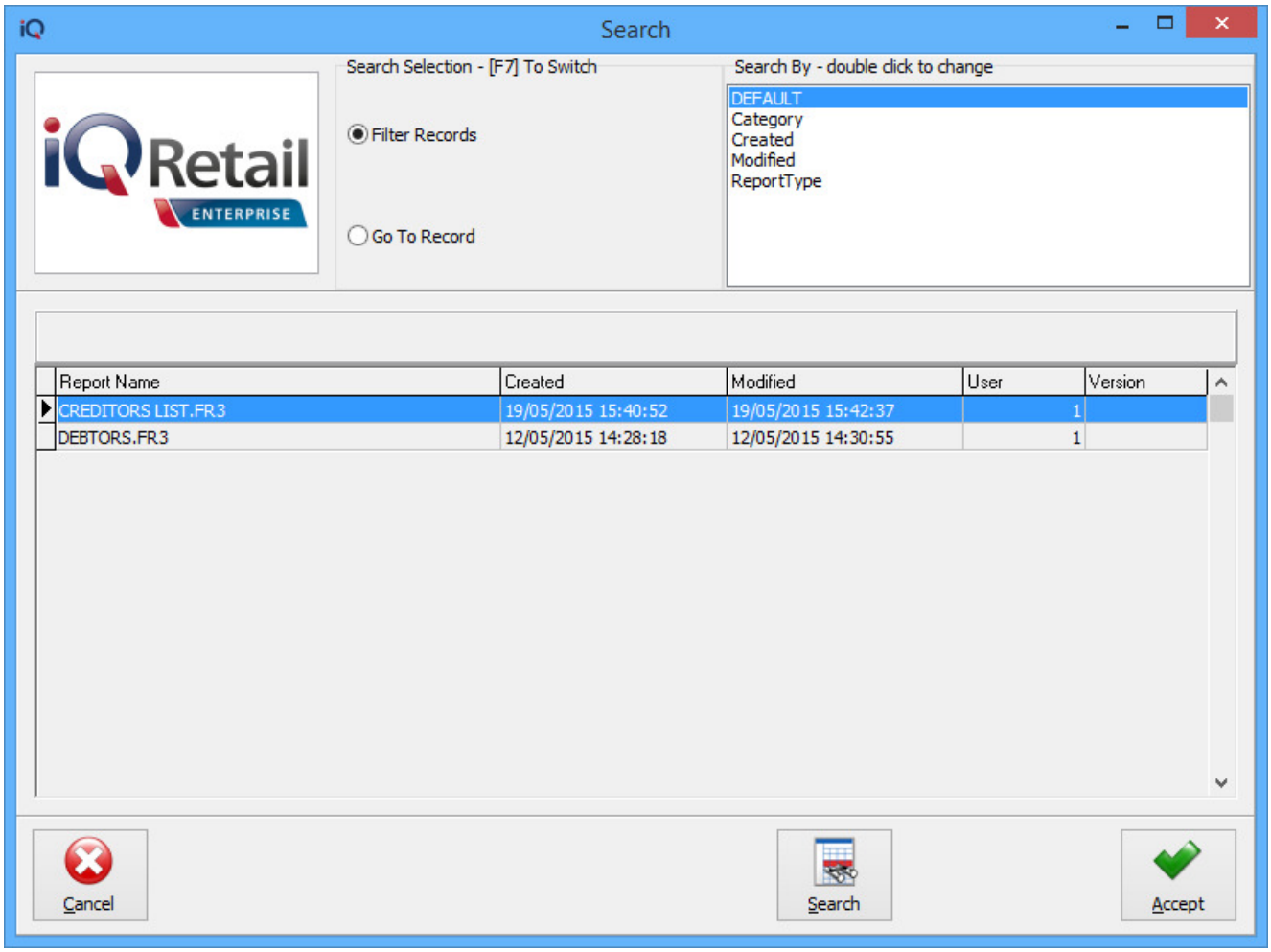
The event enable option allows the user to activate or deactivate a specific event. If the event is not enabled, the specific event will not be executed.

ITEM TYPE

The item type option allows the user to pick from 6 types; 0-None, **1-User/Custom Report**, 2-SQL Script, 3-Process, 4-IQ XML Exports and 5- IQ XML Imports. If the Report option is selected, the Browse Option becomes available.



The user has to click on the Browse button to select one of the available reports in the User Reports folder.



Only existing User Reports will be available for selection. These reports may **NOT** contain any dialogue boxes.

NOTE: User Reports are those reports created by using the Report Writer, they are not the standard or default reports in the system

ITEM DATA

Once the User Report has been selected, the Item Data will display the name of the Report.

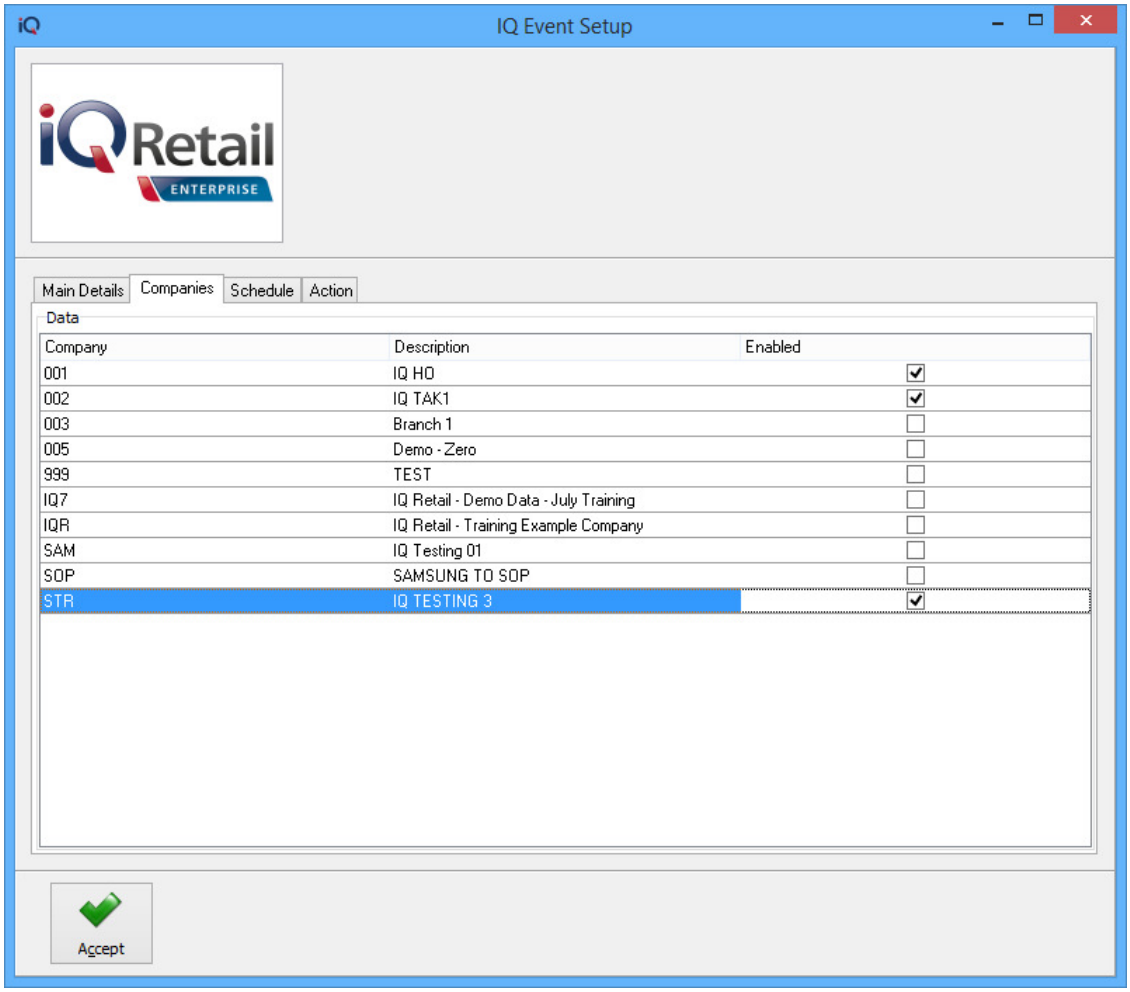
STOP ITEM AFTER

This option allows the user to specify when the event should stop. It is possible to let the event stop at previously setup time peroids, which can be selected from the drop down menu from 5 minutes to 4 hours.

IMPORTANT: The system defaults to 5 (five) minutes, when the N/A (Not Applicable) option is selected, as a safety precaution. If the event fails, no other scheduled events can be executed until the problematic event is stopped.

COMPANIES

Under the companies tab, the user needs to enable the scheduled event for a specific company. This can be done by selecting the enable option next to the company name (ticking it).

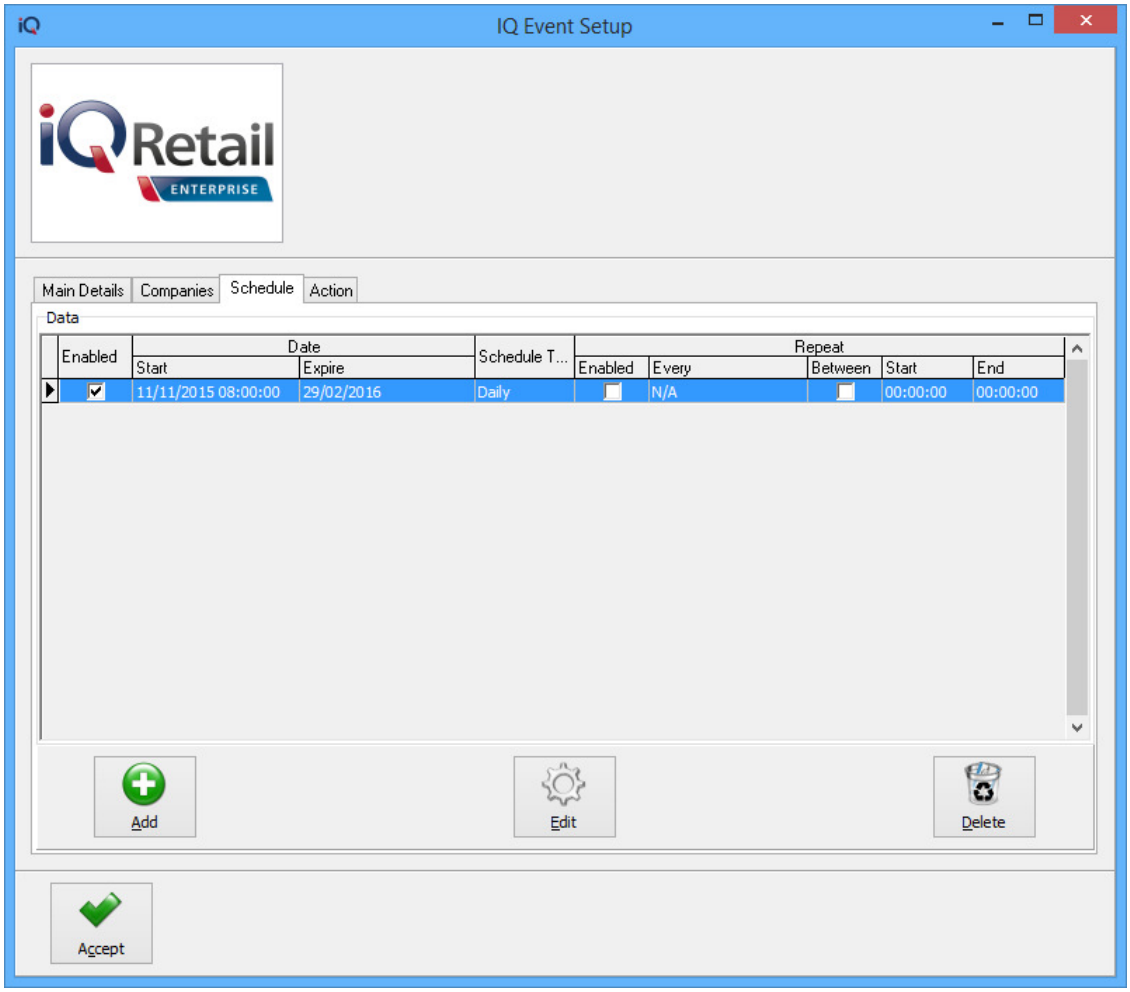


In the event where more than one company is enabled, each selected company's report will be executed and sent separately.

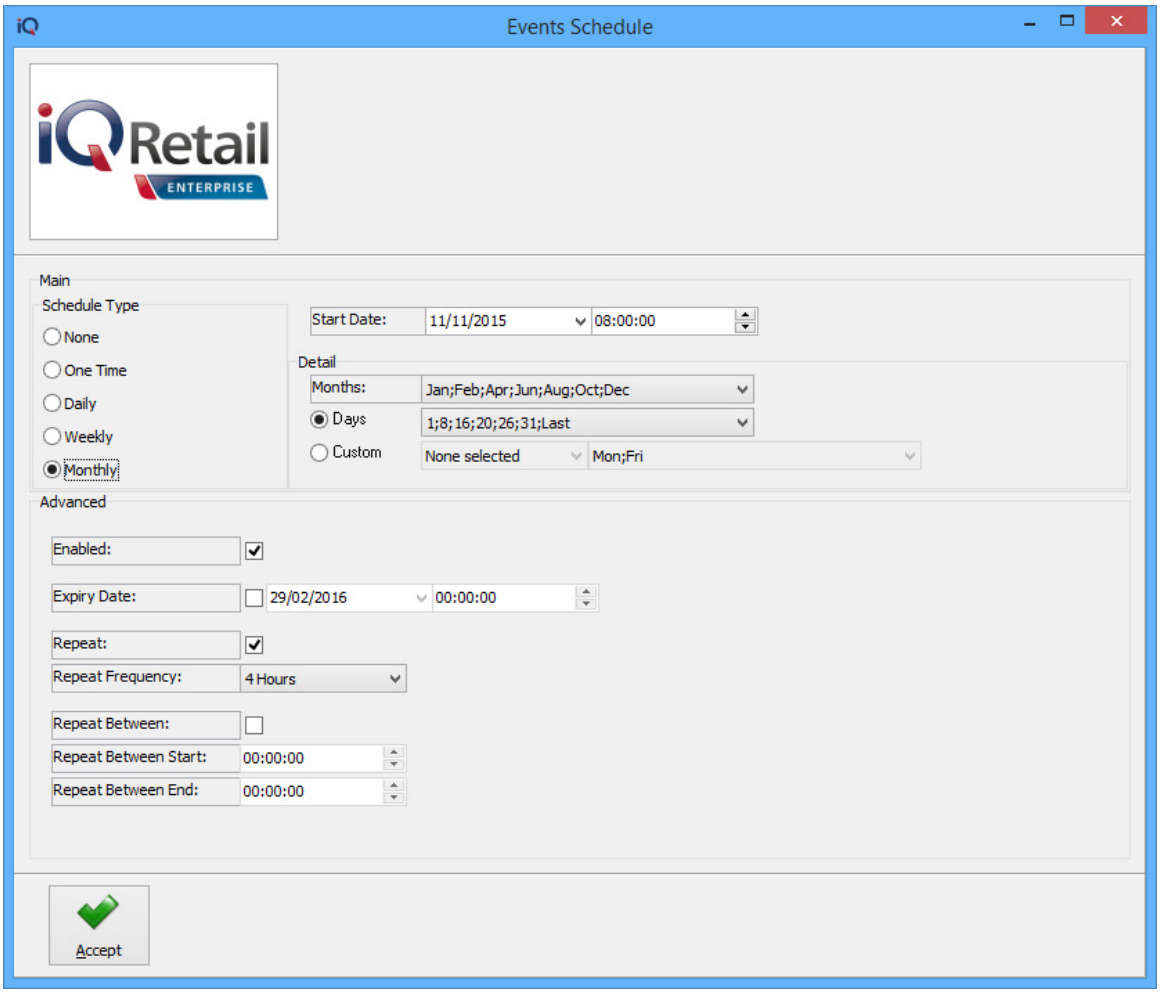
NOTE: Once the event is enabled for the specific company, proceed to the schedule tab.

SCHEDULE

Under the schedule tab the user is able to setup a specific schedule for the event. To create a schedule event, select the Add option.



NOTE: Selecting the add option allows the user to specify periods, dates and times for the event.



MAIN

SCHEDULE TYPE

The schedule type allows the user to choose the frequency of the event. There are 5 different frequency options that the user is able to choose from.

NONE

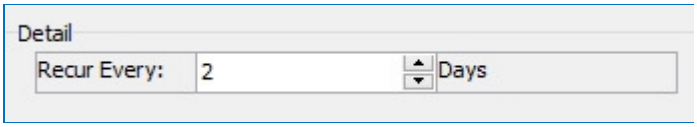
The None Option allows the user to disable the event and it will not be scheduled for any time at all.

ONE TIME

The One Time option will allow the user to schedule the event as a once off event.

DAILY

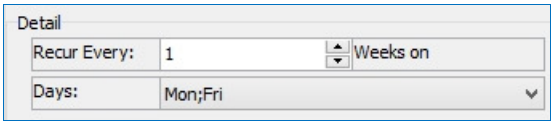
The Daily option allows the user to configure the scheduled event on a daily basis at a specific time.



NOTE: The user can select if the event should be executed every day or every second day of the week.

WEEKLY

The Weekly option allows the user to configure the scheduled event per week.

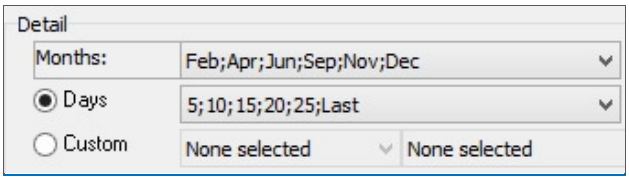


NOTE: If the Weekly option has been selected, further options become available.

NOTE: Now the user is able to select which weeks of the month and also the actual days within each week, the scheduled event should be executed.

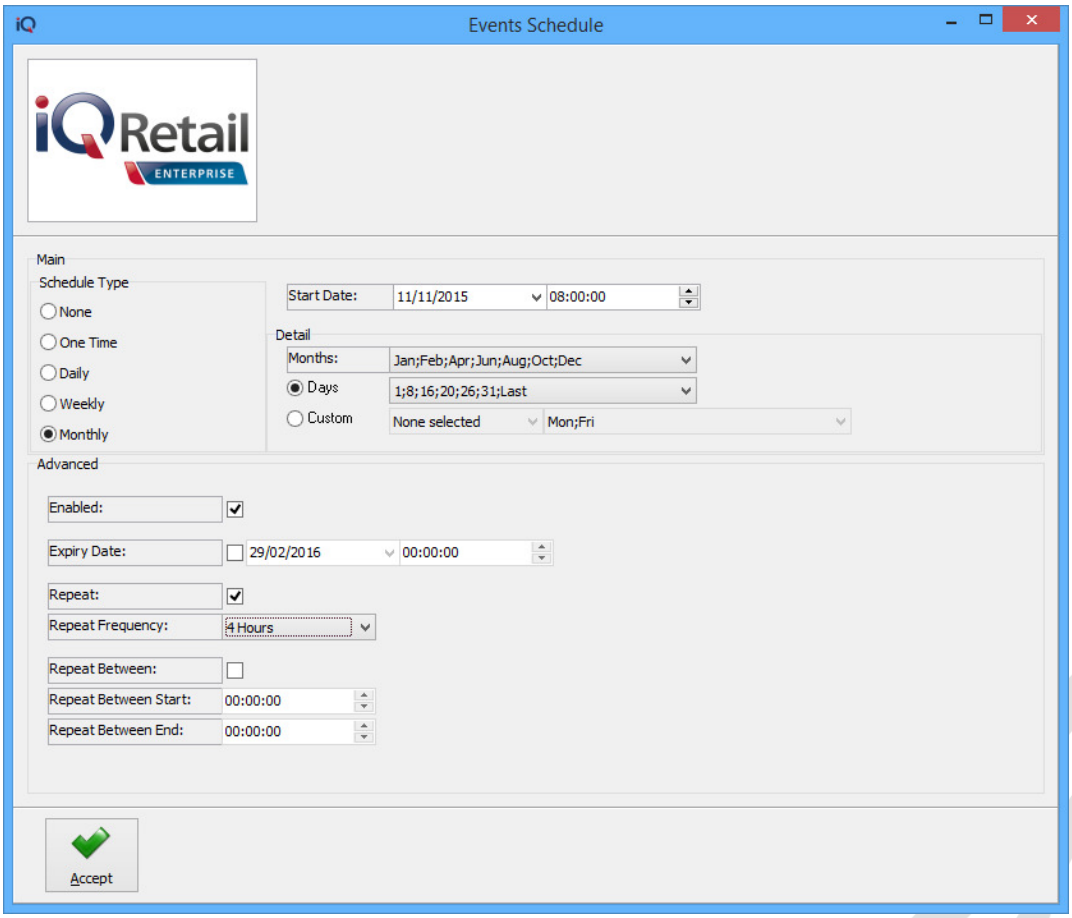
MONTHLY

The Monthly option allows the user to configure the scheduled event for specific months of the year.



NOTE: If the Monthly option has been selected, further options become available.

NOTE: Now the user is able to select which months of the year and also the actual days within the selected months, the scheduled event should be executed.



ADVANCED

ENABLED

The Enabled option needs to be ticked; otherwise the scheduled event will not be executed. Make sure the scheduled event is enabled.

EXPIRY DATE

The Expiry date allows the user to specify when the configured scheduled event must expire. This option can be left open, if there is no expiry date for the event.

REPEAT

The Repeat option allows the user to select the scheduled event to repeat every couple of minutes or hours. The range is between 5 minutes and 4 hours. The event will only be executed once within the date and time range, if there are no errors. It will only repeat within the date and time range, if the repeat option is enabled.

REPEAT FREQUENCY

The Repeat Frequency becomes available once the Repeat is enabled. The Repeat Frequency allows the user to specify when this scheduled event must repeat. This could be every 5 minutes, up to every 4 hours.

REPEAT BETWEEN

The Repeat Between option allows the user to specify if this scheduled event must repeat between specific times. Make sure this option is enabled if the event is being repeated between times.

REPEAT BETWEEN START

The Repeat Between Start allows the user to configure a specific repeat start time for the specific scheduled event.

REPEAT BETWEEN END

The Repeat Between End allows the user to configure a specific repeat end time for the specific scheduled event.

ADD

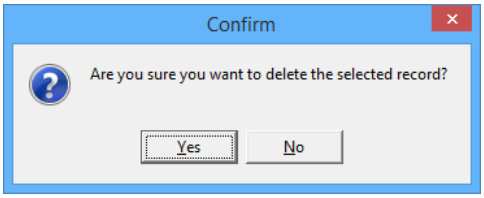
Select the Add option if any additional event scheduling options need to be added.

EDIT

Select the Edit option if any changes need to be made to any of the existing scheduled events.

DELETE

Select the Delete option if any of the existing event configurations should be deleted. By selecting the scheduled event and then clicking on the Delete button, a confirmation box will appear.



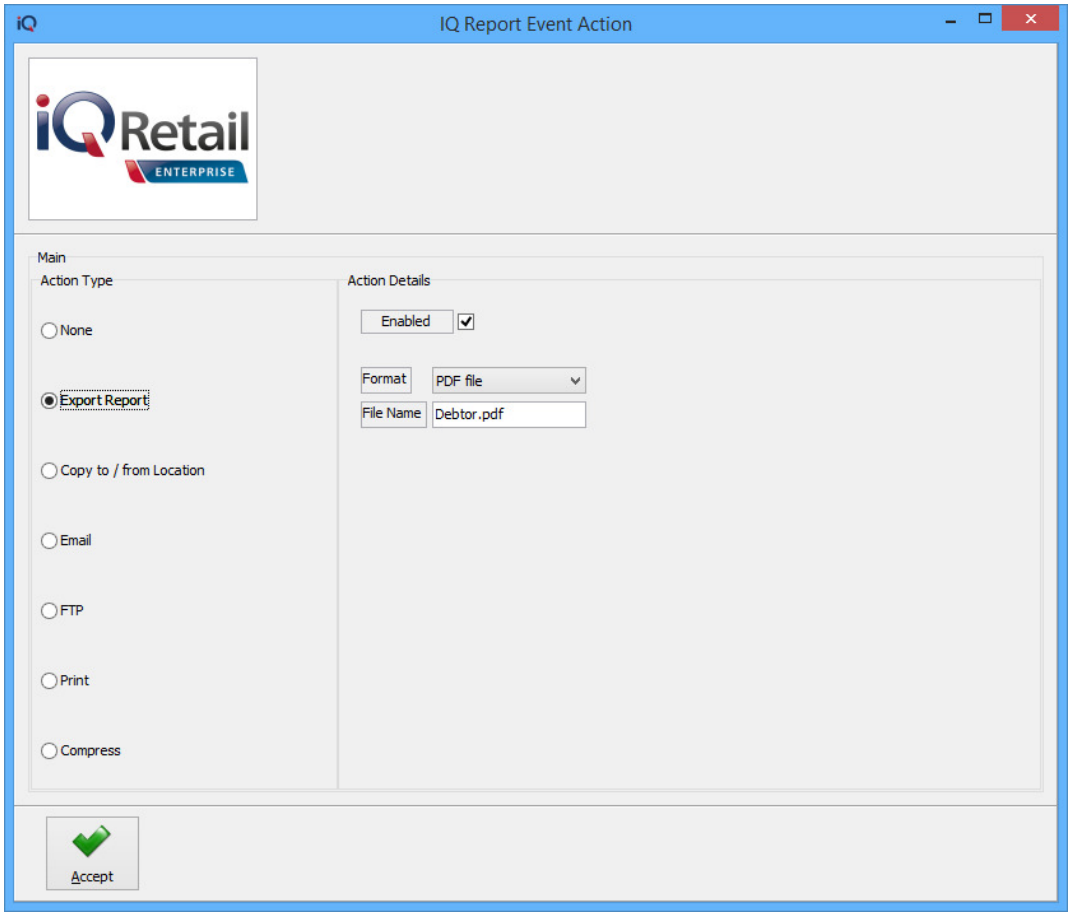
When the "**YES**" option is selected, the existing scheduled event will be permanently deleted.

ACTION

Under the Action tab, the user is able to set the desired action for a specific scheduled event. In other words, one is able to tell the event that it must either export the report, Email, FTP, and Print or compress the report.

IMPORTANT: When setting up the necessary actions for the scheduled events, make sure that the action events are in the correct order. The order should be as follows: export the report first, and the next action should be either compressing the reports or sending it out via email.

If the priority of the event is first to email, a blank email will be sent. Thereafter the rest of the actions will follow, meaning then only will it export the report and compress the file.



MAIN

ACTION TYPE

The Main Action Type provides the user with actions to be used with the report to execute the scheduled event.

ACTION DETAILS

The Action Details provide the user with the option on what to do with the event results, where to save or send the data, which name and format to use for the report.

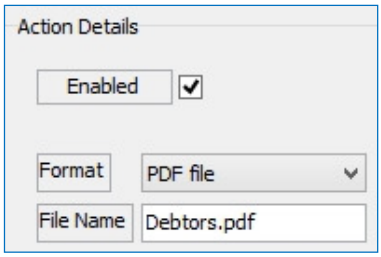
ACTION TYPES & THEIR APPROPRIATE DETAILS

NONE

The None action type means that no action will be taken on the scheduled event and there are no details.

EXPORT REPORT

The Export report action option allows the user to export the report that is used on the scheduled event, in a specific format. The report can be exported in one of the following formats: PDF, XLS, HTML, Text, BMP, GIF, JPEG, TIFF, RTF and CSV. The user can export the report and give it a specific name.



ENABLED

The enabled option allows the user to enable the specific action.

FORMAT

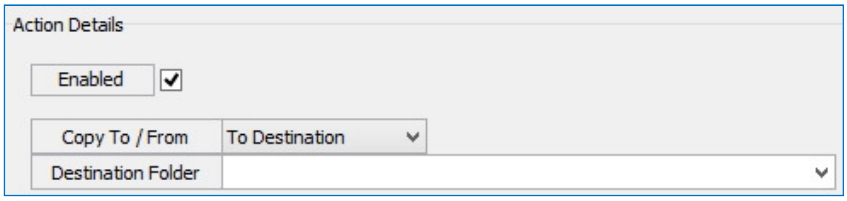
The Format option allows the user to choose a specific format to export the report in.

FILE NAME

The File Name option allows the user to specify the File Name for the Information that is exported. This means that the user is able to type in any name for the file or information that is exported.

COPY TO / FROM LOCATION

After the scheduled report has been executed, the user can select where the report can be copied to, or it can be copied from the server to another destination where it will be used. The Copy To/From Location option makes this possible.

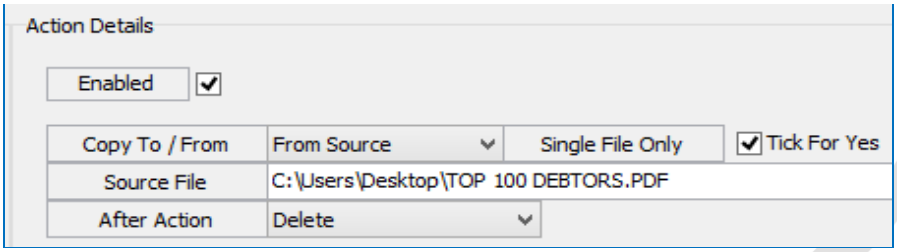


ENABLED

The enabled option allows the user to enable the specific action.

COPY TO – DESTINATION

The Copy To Destination option allows the user to select a specific destination whereto the file can be copied. This option will copy the report from this server to another computer.



COPY FROM – SOURCE

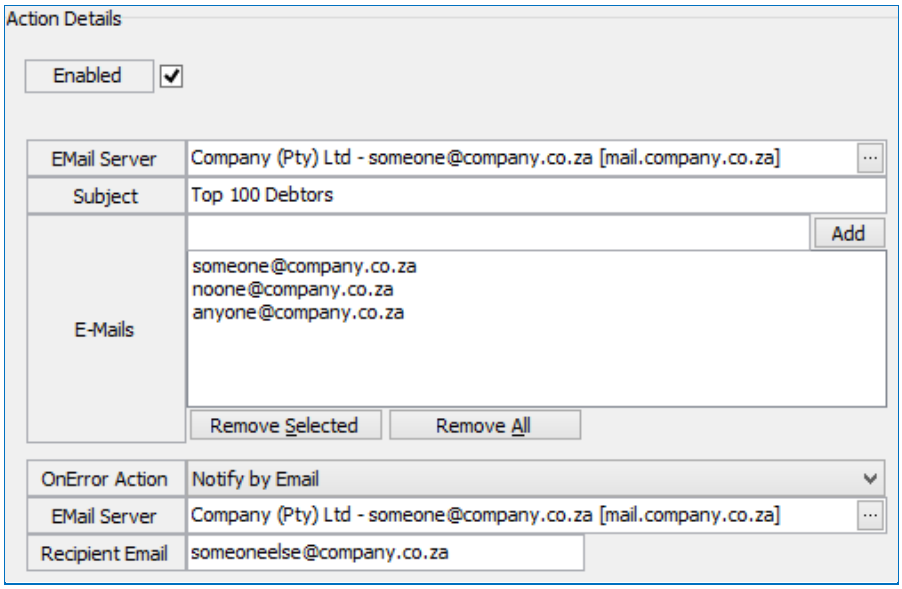
The Copy From Source option allows the user to select which file(s) to be copied from a specific destination to the server. If the "Single File Only" option has been ticked, the IQ Automation will copy only the specified file to the server. If it was not ticked, IQ Automation will copy all the files in the selected folder over.

AFTER ACTION

If the filename(s) already exist on the server, the user has the option to either Rename the file(s) by saving it under a new provided name, or to delete the files already on the server and then copy the new information over.

EMAIL

The email option allows the user to email the report using the configured email server that was setup earlier.



ENABLED

The enabled option allows the user to enable the specific action.

EMAIL SERVER

The email Server option allows the user to select any of the configured email servers.

SUBJECT

The subject allows the user to type in a subject for the email. This subject will appear when the email is received via the email client.

E-MAILS

The e-mails option allows the user to add specific email addresses line per line. This means that when the report is generated, it will be sent to all the email addresses that are listed in the e-mails box.

The user also has the option to remove selected email addresses or to remove all.

ONERROR ACTION

If the report can't be sent via email to one of the email addresses, the user can choose one of three actions, None selected, Notify by Email or Retry on next Scheduled Execution.

EMAIL SERVER

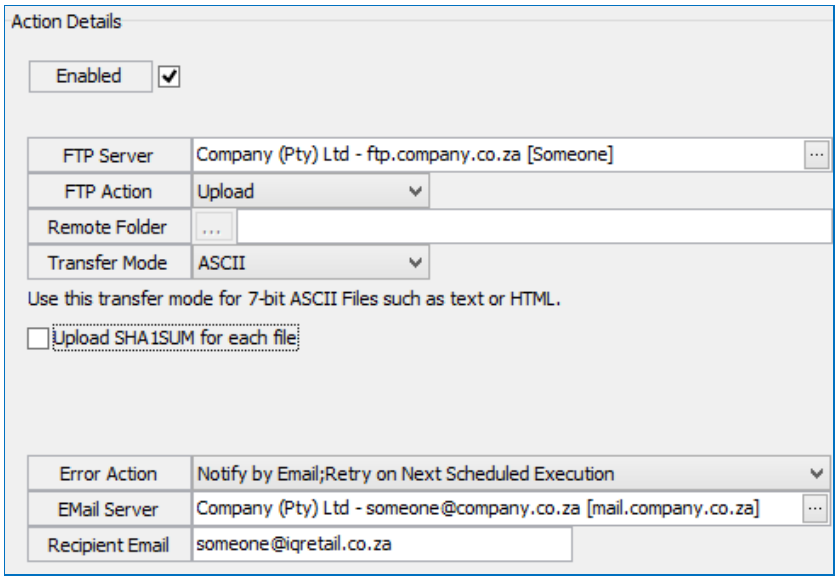
This option allows the user to select the email server to use when the notification is sent.

RECIPIENT EMAIL

The Recipient Email address allows the user to setup a specific email address to be used when the receiver of the email wants to return a message.

FTP

The FTP option allows the user to send the report via FTP to a specific folder on the ftp server, where in turn it may be downloaded again to view.



ENABLED

The enabled option allows the user to enable the specific action.

FTP SERVER

The FTP Server option allows the user to select any of the configured ftp servers to transfer the report to.

FTP ACTION

The FTP action allows the user to choose if the report should be Uploaded or Downloaded to or from the FTP server.

REMOTE FOLDER

The Remote Folder is the folder that is accessible via ftp that is located on the ftp server. The report will be sent there automatically using this function.

TRANSFER MODE

The user has the option to choose between the ASCII or Binary format to transfer the report.

USE THE ASCII TRANSFER MODE FOR 7-BIT FILES SUCH AS TEXT OR HTML.

Use the Binary transfer mode for 8-bit files such as executables, compressed folders, multimedia, etc.

UPLOAD SHA1SUM FOR EACH FILE

This option allows the user to load a checksum file with the report, to ensure that the content of the file doesn't change while it is being uploaded or downloaded.

ERROR ACTION

The Error Action allows the user to notify the user or receiver of the report by email if the report was not uploaded or downloaded correctly. The user can also set IQ Automation to retry the ftp upload or download on the next scheduled execution.

EMAIL SERVER

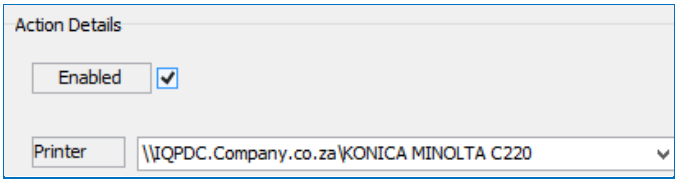
This will be the email server which should be used to notify the user or receiver if the ftp upload or download was not done correctly.

RECIPIENT EMAIL

This will be the email address of the user or the recipient who would be notified if the report was not uploaded or downloaded correctly.

PRINT

The Print option allows the user to print the report. This means that when the scheduled event takes place, the report will be printed to the selected destination.



ENABLED

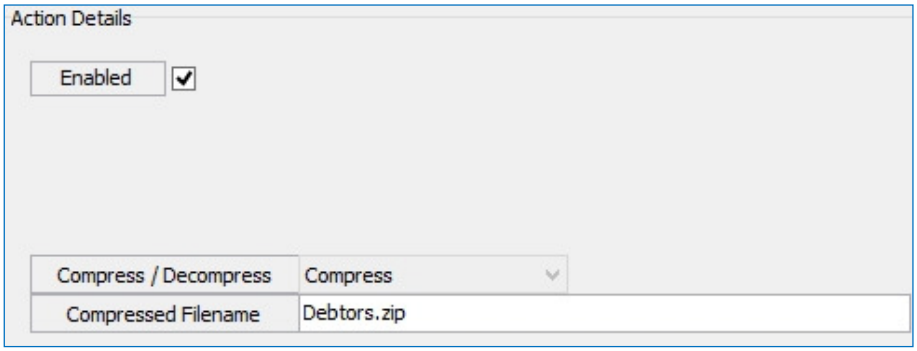
The enabled option allows the user to enable the specific action.

PRINTER

The Printer allows the user to select the printer where the report should be printed.

COMPRESS

The Compress option allows the user to export the report into a compressed zip file. This means that the user is able to extract the created zip file and view the report.



ENABLED

The enable option allows the user to enable the specific action.

COMPRESS / DECOMPRESS

The Compress option allows the user to compress the file before saving it, into a .zip file. The Decompress option allows the user to decompress the file that was saved, to enable him to read or access the data.

COMPRESSED FILENAME

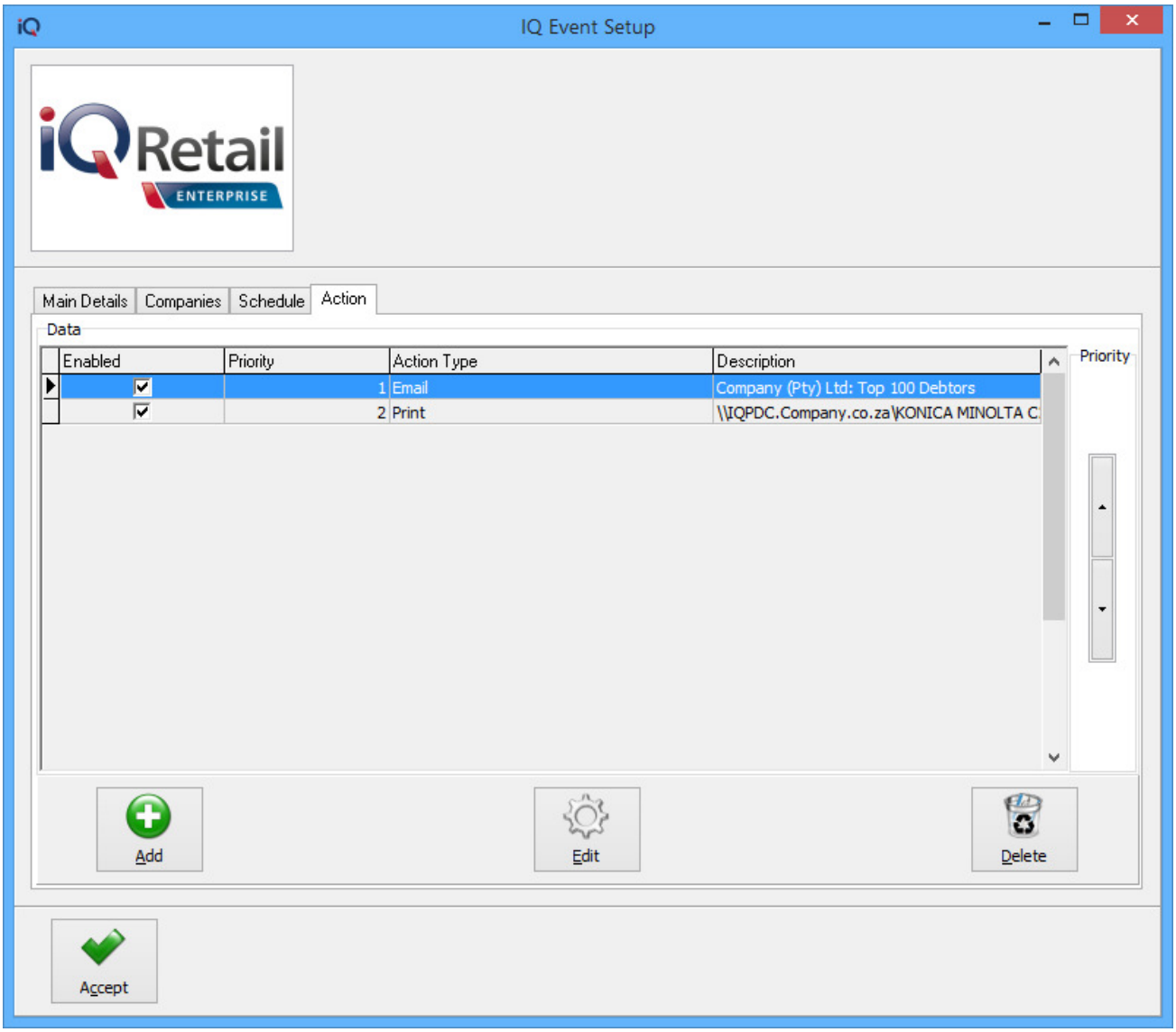
The Compressed Filename is the name that will be used on the server to save the compressed file, once the report has run.

ACCEPT

Select the Accept option to save any changes that have been made under the action tab in the event schedule screen.

SCHEDULED EVENT FINALISED

To finalise the scheduled event, ensure that the priority order is correct. This can be done by highlighting the specific action and then using the Priority Bar on the right hand side of the screen in order to set the priorities correctly.



IMPORTANT: When setting up the necessary actions for the scheduled event, make sure that the event actions are in the correct order. The order should be as follows, export the report first, and then the next action should be either to compress the report or to send the report out, via email.

If the priority of the event actions are not correct and first start with email, a blank email will be sent and thereafter the rest of the actions.

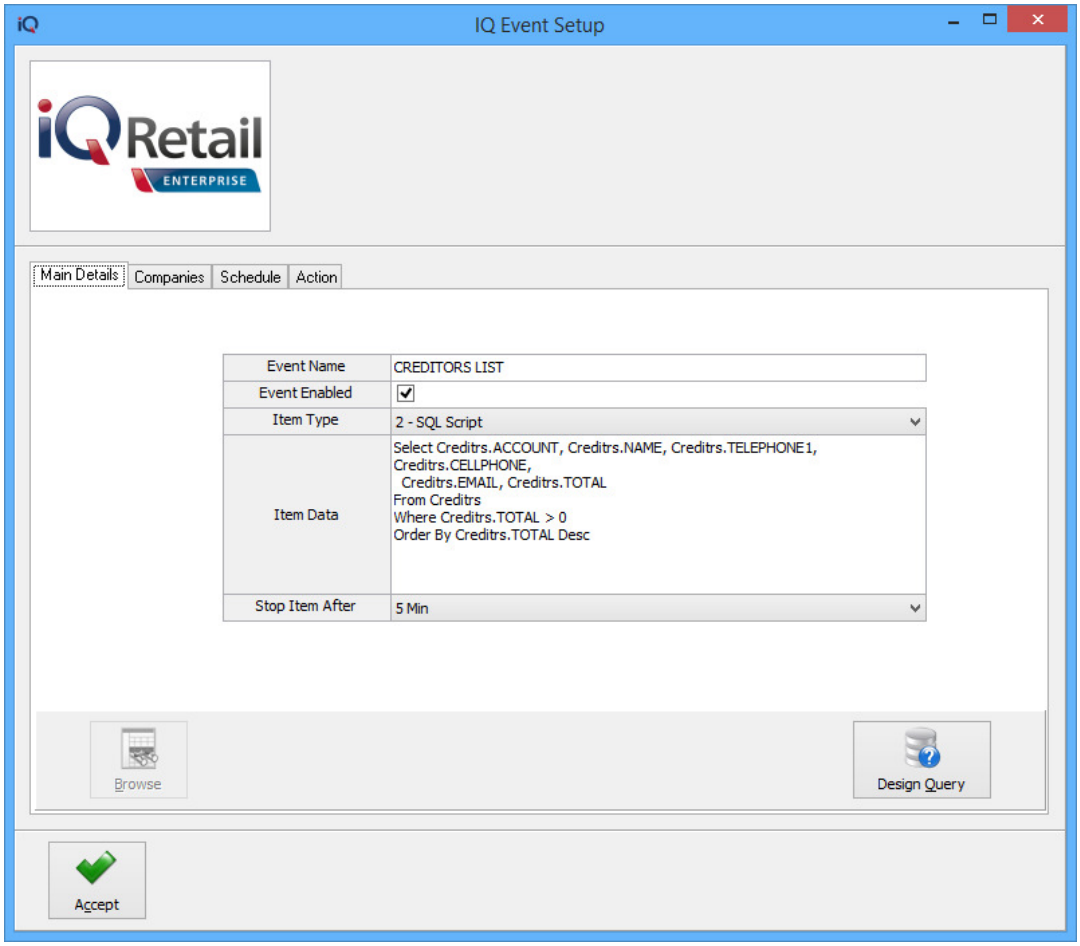
Select the Accept option to finalise the selected scheduled event.

SCHEDULED EVENTS USING THE SQL SCRIPT TYPE

Using the SQL query option to create a scheduled event is a bit more complicated than the first way by means of a report. Using a SQL query to extract the data can be time consuming, but the capabilities of extracting almost any data is very possible.

NOTE: If the user doesn't know SQL scripting, the Value Added Reseller should be contacted for assistance.

IMPORTANT: When using the "**2 – SQL Script**" option to generate a report via the scheduled event, the query may **NOT** contain any criteria where human interface (selection boxes, drop down boxes or date selections, etc.) is required.



MAIN DETAILS

EVENT NAME

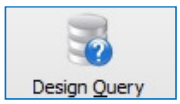
The event name is where the user gives the specific event a name.

EVENT ENABLED

The event enable option allows the user to activate or deactivate a specific event. If the event is not enabled, the specific event will not be executed.

ITEM TYPE

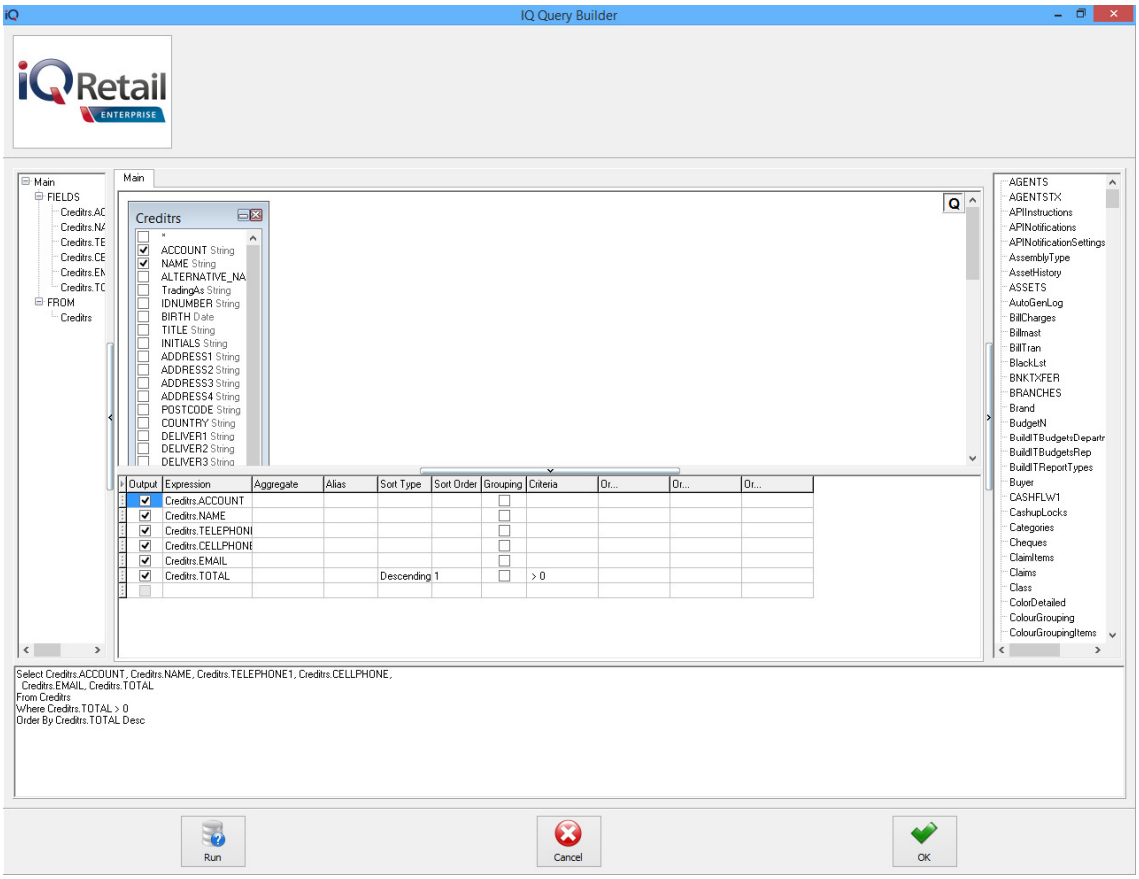
The item type option allows the user to pick from 6 types; 0-None, 1-User/Custom Report, **2-SQL Script**, 3-Process, 4-IQ XML Exports and 5- IQ XML Imports. If the **SQL Script** option is selected, the Design Query Option becomes available.



The user has to click on the Design Query button to Activate the Query Builder or to open the Advanced Database Utility.

ACTIVE QUERY BUILDER

On the query builder the SQL query needs to be created. This query will be used to extract the information directly from the database for the specific company.

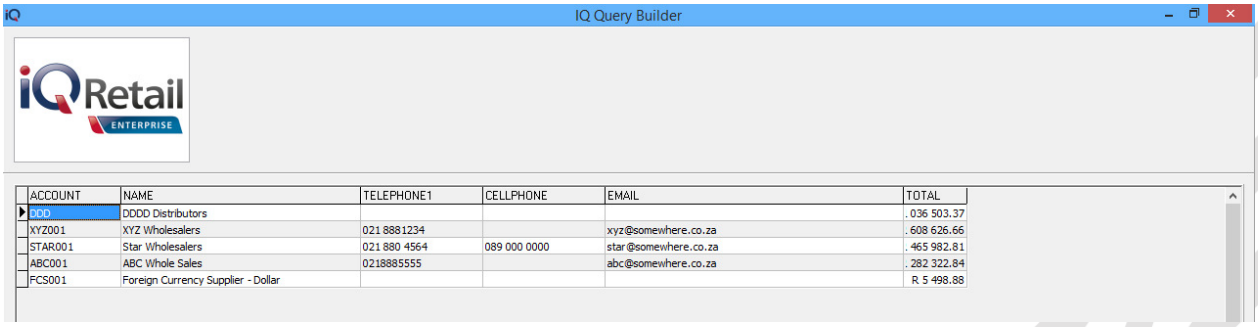


NOTE: If the user doesn't know SQL scripting, the Value Added Reseller should be contacted for assistance.

BUTTON FUNCTIONALITY

RUN

Once the query is completed, select the Run option to see if the query is correct and the right information is extracted.



NOTE: Above is the result of the SQL query that was created in order to extract the relevant information.

DESIGN

The Design option allows the user to go back to the script and to change it where necessary.

CANCEL

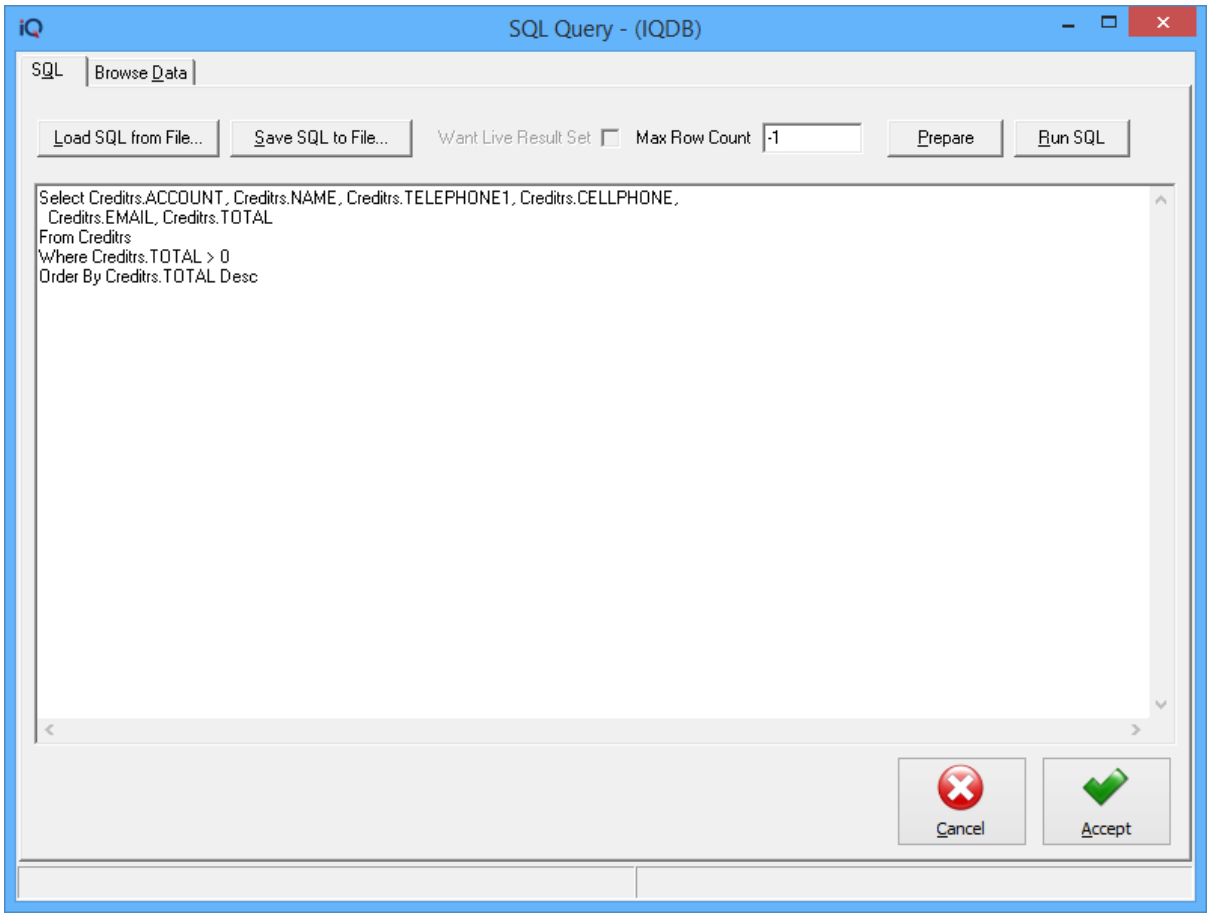
The Cancel option closes the IQ Query builder.

OK

The Ok option saves the SQL query for further use and allows the user to proceed.

ADVANCED DATABASE UTILITY

NOTE: If the user doesn't know SQL scripting, the Value Added Reseller should be contacted for assistance.



The Advanced Database Utility allows the user to enter more complicated SQL queries.

ITEM DATA

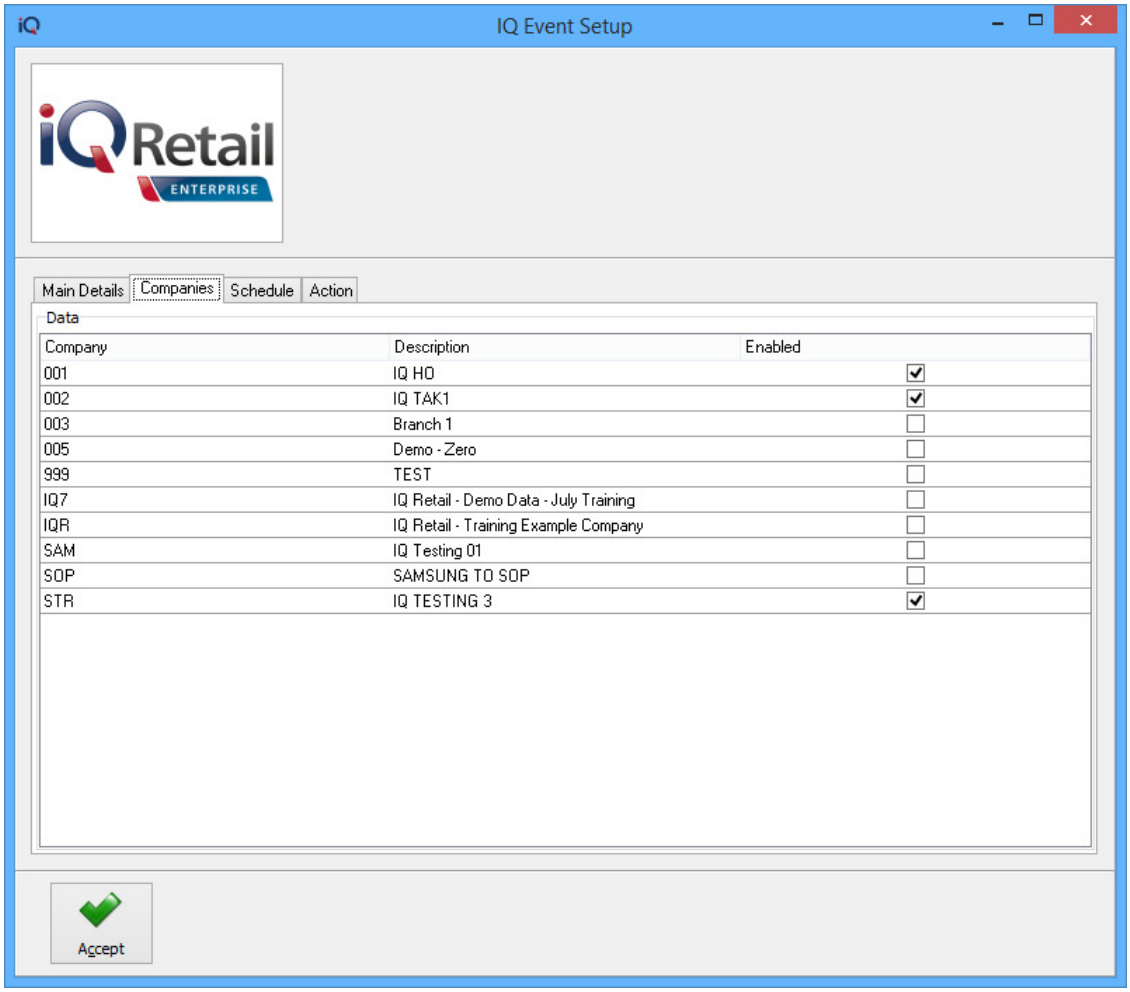
The end result of the SQL will be displayed in the Item Data field.

STOP ITEM AFTER

This option allows the user to specify when the event should stop. It is possible to let the event stop at previously setup time peroids, which can be selected from the drop down menu from 5 minutes to 4 hours.

COMPANIES

Under the companies tab, the user needs to enable the scheduled event for a specific company. This can be done by selecting the enable option next to the company name.

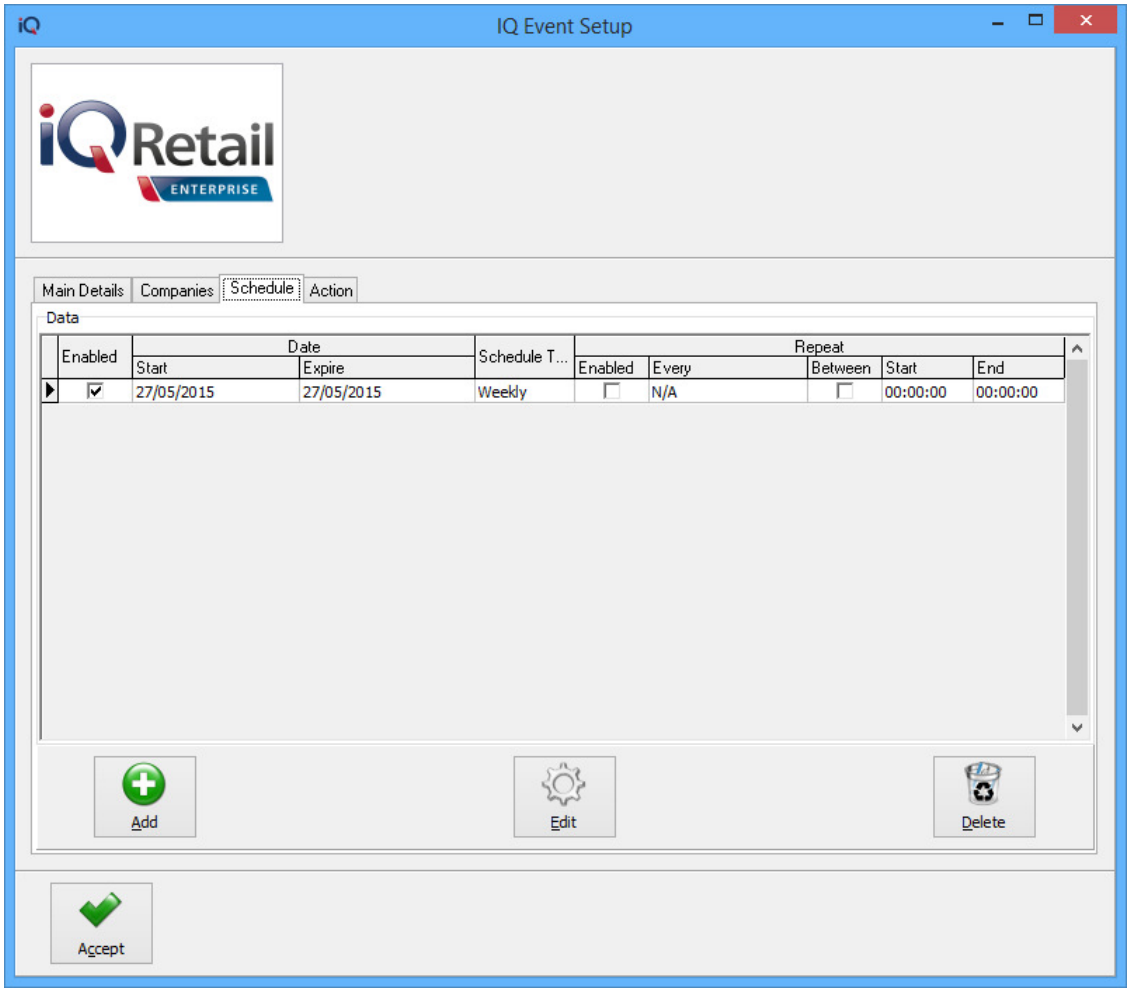


In the event where more than one company is enabled, each selected company's report will be executed and sent separately.

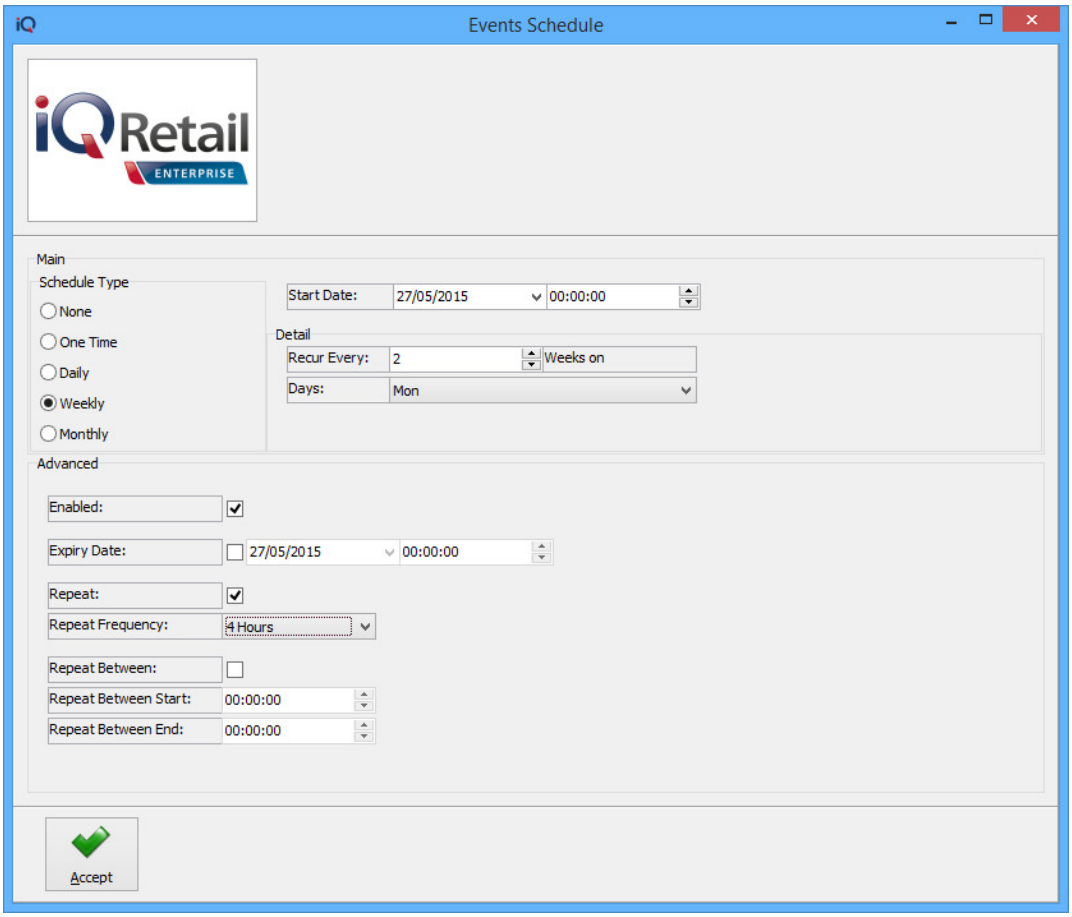
NOTE: Once the event is enabled for the specific company, proceed to the schedule tab.

SCHEDULE

Under the schedule tab the user is able to setup a specific schedule for the event. To create a schedule event, select the Add option.



NOTE: Selecting the add option allows the user to specify periods, dates and times for the event.



MAIN

SCHEDULE TYPE

The schedule type allows the user to choose the frequency of the event. There are 5 different frequency options that the user is able to choose from.

NONE

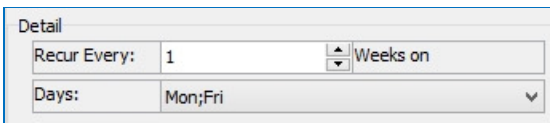
The None Option allows the user to disable the event and it will not be scheduled for any time at all.

ONE TIME

The One Time option will allow the user to schedule the event as a once off event.

DAILY

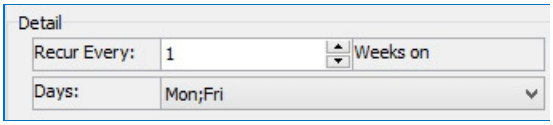
The Daily option allows the user to configure the scheduled event on a daily basis at a specific time.



NOTE: The user can select if the event should be executed every day or every second day and also which day of the week it should be executed.

WEEKLY

The Weekly option allows the user to configure the scheduled event per week.

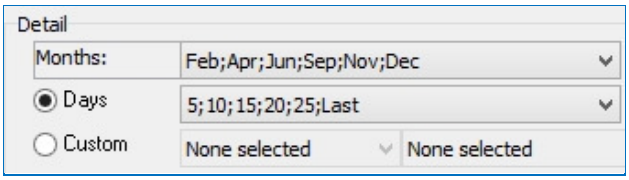


NOTE: If the Weekly option has been selected, further options become available.

NOTE: Now the user is able to select which weeks of the month and also the actual days within each week, the scheduled event should be executed.

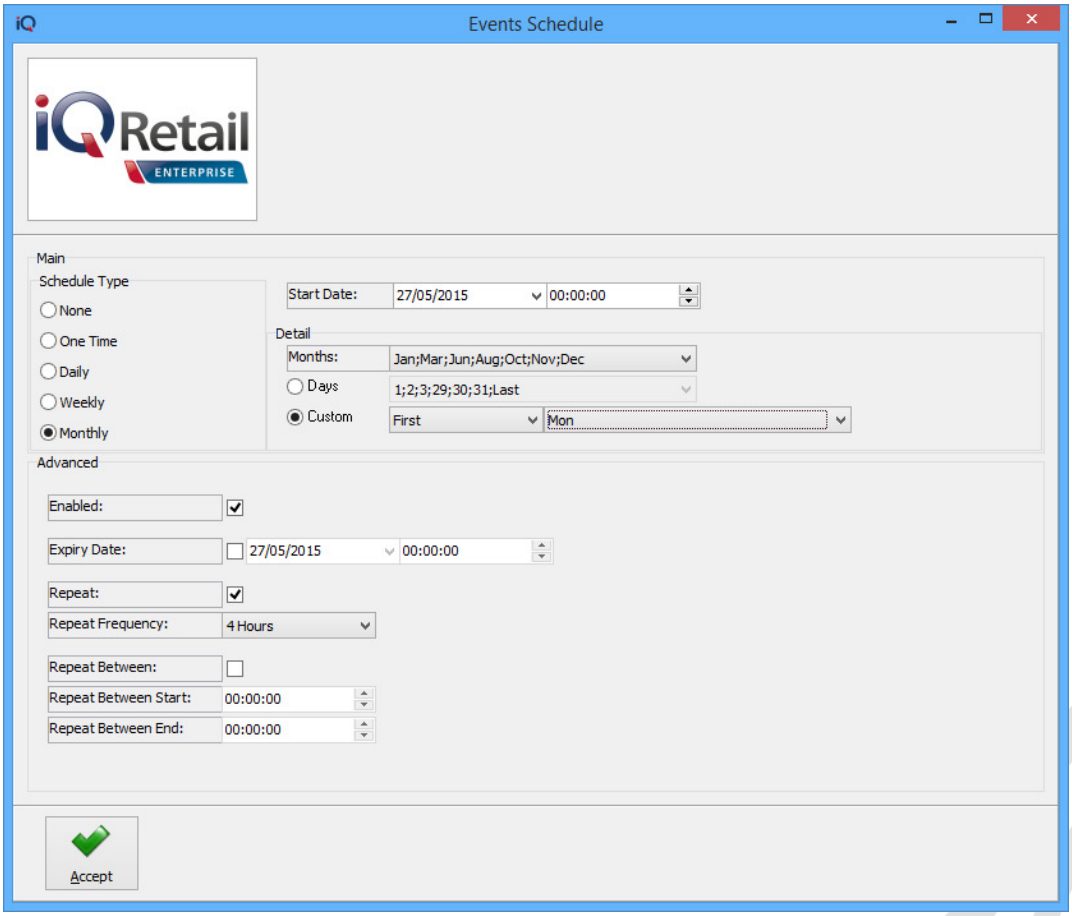
MONTHLY

The Monthly option allows the user to configure the scheduled event for specific months of the year.



NOTE: If the Monthly option has been selected, as in the example, further options become available.

NOTE: Now the user is able to select which months of the year and also the actual days within the months, the scheduled event should be executed.



ADVANCED

ENABLED

The Enabled option needs to be ticked; otherwise the scheduled event will not be executed. Make sure the scheduled event is enabled.

EXPIRY DATE

The Expiry date allows the user to specify when the configured scheduled event must expire. This option can be left open if there is no expiry date for the event.

REPEAT

The Repeat option allows the user to select the scheduled event to repeat every couple of minutes or hours. The range is between 5 minutes and 4 hours. The event will only be executed once within the date and time range, if there are no errors. It will only repeat within the date and time range, if the repeat option is enabled.

REPEAT FREQUENCY

The Repeat Frequency becomes available once the Repeat is enabled. The Repeat Frequency allows the user to specify when this scheduled event must repeat. This could be every 5 minutes, up to every 4 hours.

REPEAT BETWEEN

The Repeat Between option allows the user to specify if this scheduled event must repeat between specific times. Make sure this option is enabled if the event is being repeated between times.

REPEAT BETWEEN START

The Repeat Between Start allows the user to configure a specific repeat start time for the specific scheduled event.

REPEAT BETWEEN END

The Repeat Between End allows the user to configure a specific repeat end time for the specific scheduled event.

ADD

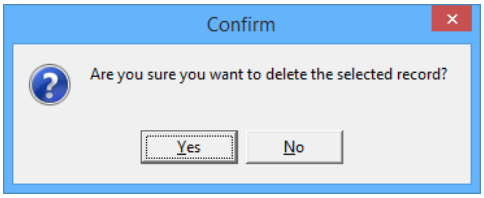
Select the Add option if any additional event scheduling options need to be added.

EDIT

Select the Edit option if any changes need to be made to any of the existing scheduled events.

DELETE

Select the Delete option if any of the existing event configurations should be deleted. By selecting the scheduled event and then clicking on the Delete button, a confirmation box will appear.



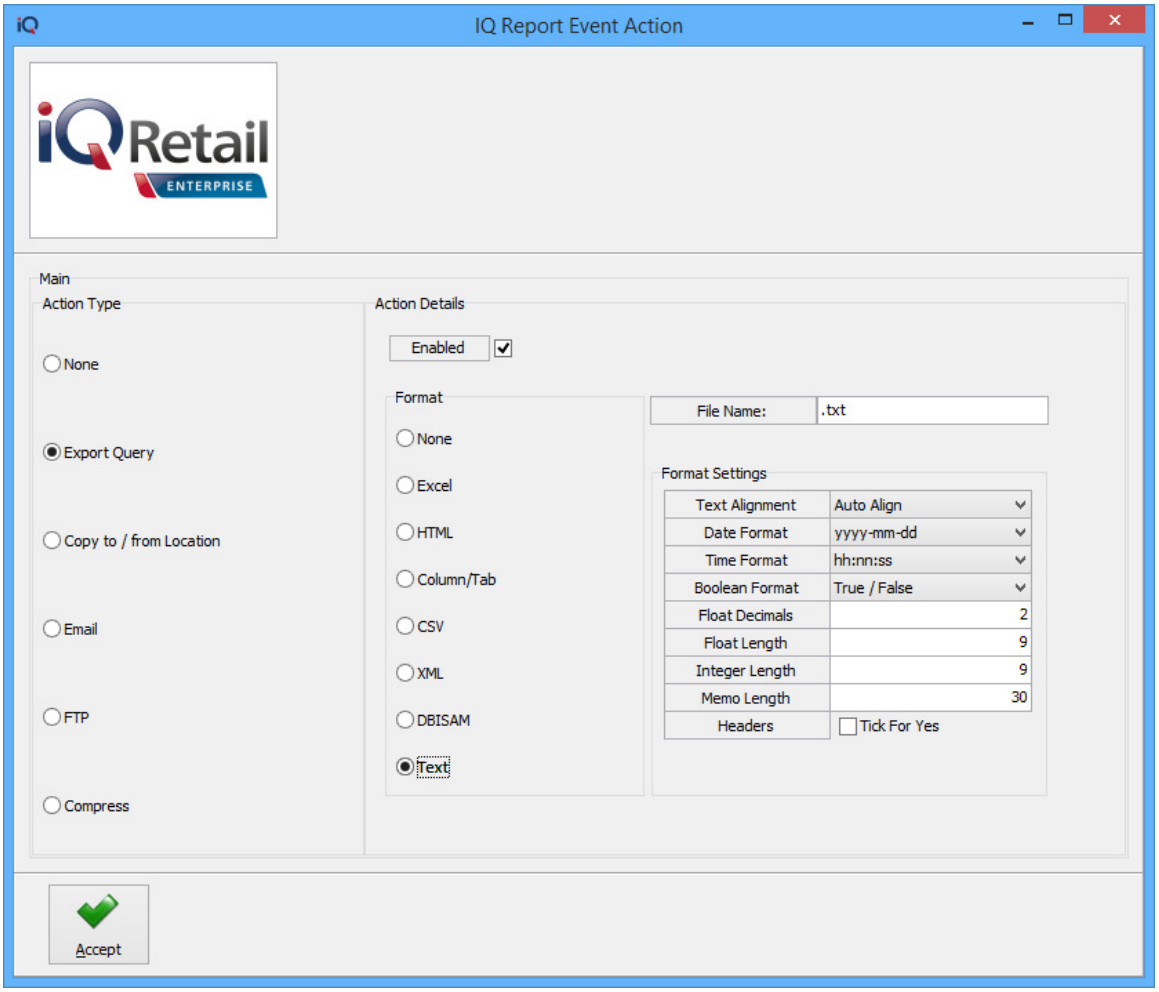
When the "**YES**" option is selected, the existing scheduled event will be permanently deleted.

ACTION

Under the Action tab, the user is able to set the desired action for a specific scheduled event. In other words, one is able to tell the event that it must either export the results, Email, FTP, and Print or compress the results of the query.

IMPORTANT: When setting up the necessary actions for the scheduled events, make sure that the action events are in the correct order. The order should be as follows: export the query first, and then the next action should be either compressing the query or sending it out via email.

If the priority of the event is first to email, then a blank email will be sent, thereafter the rest of the actions will follow, meaning then only will it export the query and compress the file.



MAIN

ACTION TYPE

The Main Action Type provides the user with actions to be used with the SQL query to execute the scheduled event.

ACTION DETAILS

The Action Details provides the user with the option on what to do with the event results, where.

ACTION TYPES & THEIR APPROPRIATE DETAILS

NONE

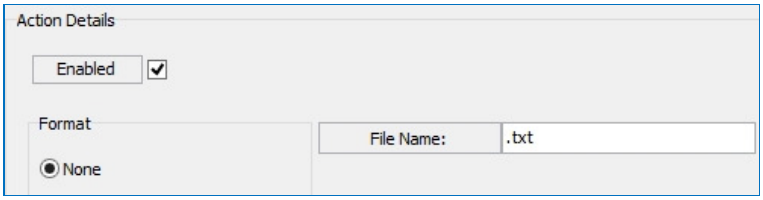
The None action type means that no action will be taken on the scheduled event and there are no details.

EXPORT REPORT

The Export Query action option allows the user to export the query that is used on the scheduled event, in a specific format. The user can even export the Query and give it a specific name. The query can be exported in of the following formats: None, Excel, HTML, Column/Tab, .CSV, XML, DBISAM & Text).

NONE

The None option's format will default to .txt. The user can provide a specific name for the exported query.



ENABLED

The enabled option allows the user to enable the specific action.

FORMAT

The Format option allows the user to choose a specific format to export the SQL query in.

FILE NAME

The File Name option allows the user to specify the File Name for the Information that is exported. This means that the user is able to type in any name for the file or information that is exported.

EXCEL

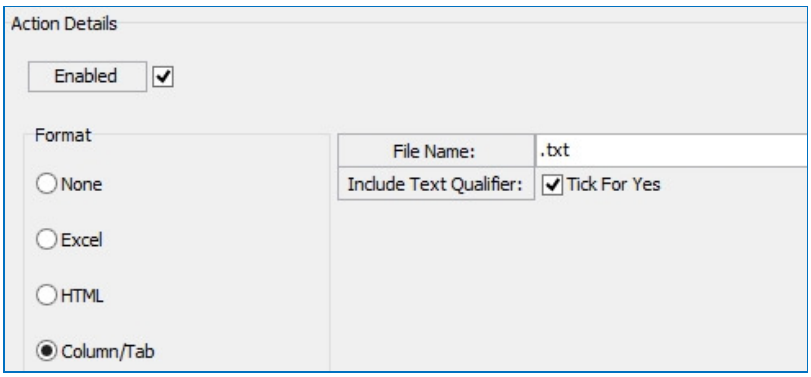
The Excel option allows the user to export the results of the SQL query in Excel format. This exported file can then be open in Excel.

HTML

The HTML option allows the user to export the results of the SQL query in HTML formal, which can then be opened on a Web site.

COLUMN/TAB

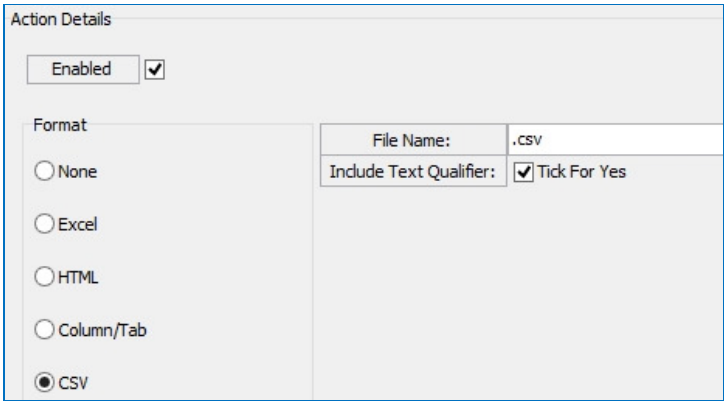
The results of the query will be in a tab delimited format.



The Text Qualifier is the character that encloses the values in the text file. The user can select if the Text Qualifier should be included into results file.

CSV

The CSV option allows the user to export the results of the SQL query in .CSV (comma delimited) format.



XML

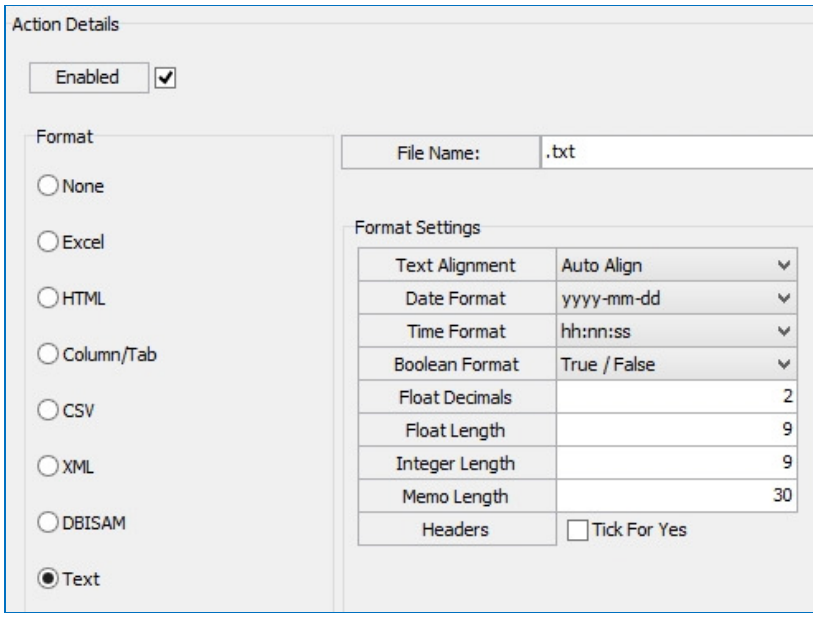
The user can select if the results of the SQL query should be in XML format. XML is a text-based format used to share data on the World Wide Web, intranets and elsewhere.

DBISAM

The user can select to export the results of the SQL query in DBISAM format. DBISAM compiles directly into your application with no external libraries required. In other words, a data file is compiled, which can be imported directly into the IQ database.

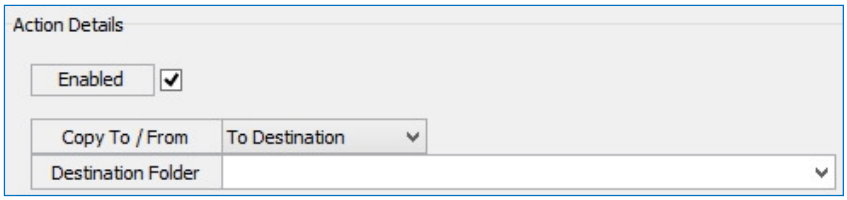
TEXT

The Text option allows the user to export the results of the SQL query in text format, which means that the information is stored into an ordinary sequential file with exact field sizes. The user also has the option to format the text settings, to specify exactly how the text file should look.



COPY TO / FROM LOCATION

After the scheduled SQL query has been executed, the user can select where the results of the SQL query can be copied to, or it can be copied from the server to another destination where it will be used. The Copy To/From Location option makes this possible.

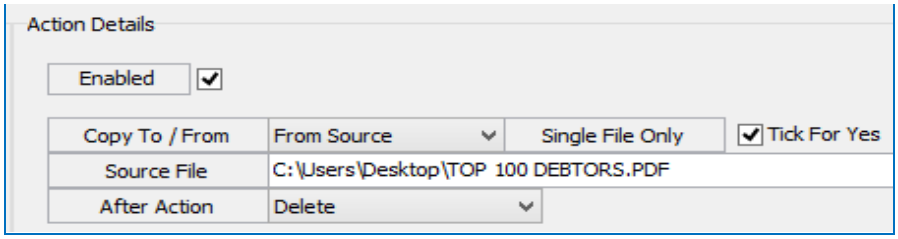


ENABLED

The enabled option allows the user to enable the specific action.

COPY TO – DESTINATION

The Copy To Destination option allows the user to select a specific destination whereto the file can be copied. This option will copy the report from this server to another computer.



COPY FROM – SOURCE

The Copy From Source option allows the user to select which file(s) to be copied from a specific destination to the server. If the "Single File Only" option has been ticked, the IQ Automation will copy only the specified file to the server.

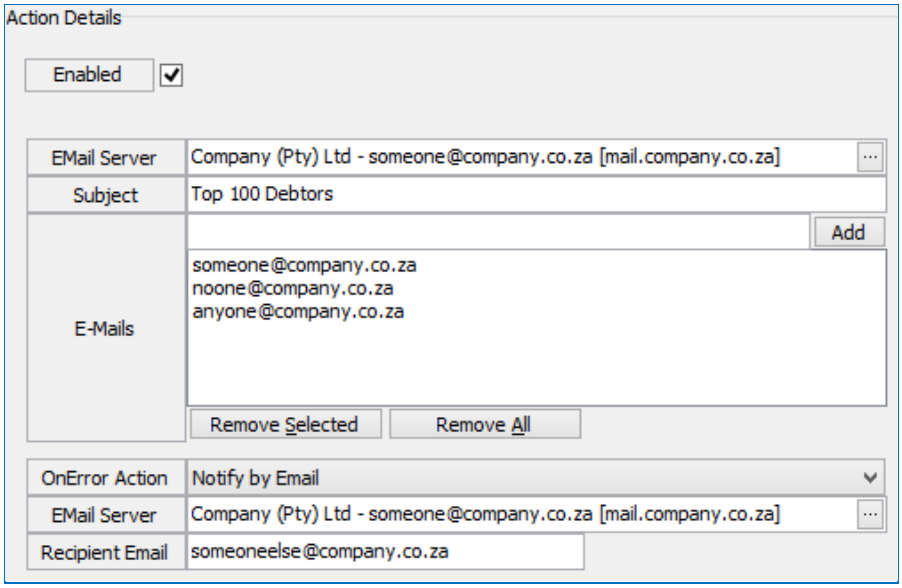
If it was not ticked, IQ Automation will copy all the files in the selected folder over.

AFTER ACTION

If the filename(s) already exist on the server, the user has the option to either Rename the file(s) by saving it under a new provided name, or to delete the files already on the server and then copy the new information over.

EMAIL

The email option allows the user to email the SQL query results using the configured email server that was setup earlier.



ENABLED

The enabled option allows the user to enable the specific action.

EMAIL SERVER

The email Server option allows the user to select any of the configured email servers.

SUBJECT

The subject allows the user to type in a subject for the email. This subject will appear when the email is received via the email client.

E-MAILS

The e-mails option allows the user to add specific email addresses line per line. This means that when the report is generated, it will be sent to all the email addresses that are listed in the e-mails box.

The user also has the option to remove selected email addresses or to remove all.

ONERROR ACTION

If the SQL query results can't be sent via email to one of the email addresses, the user can choose one of three actions, None selected, Notify by Email or Retry on next Scheduled Execution.

EMAIL SERVER

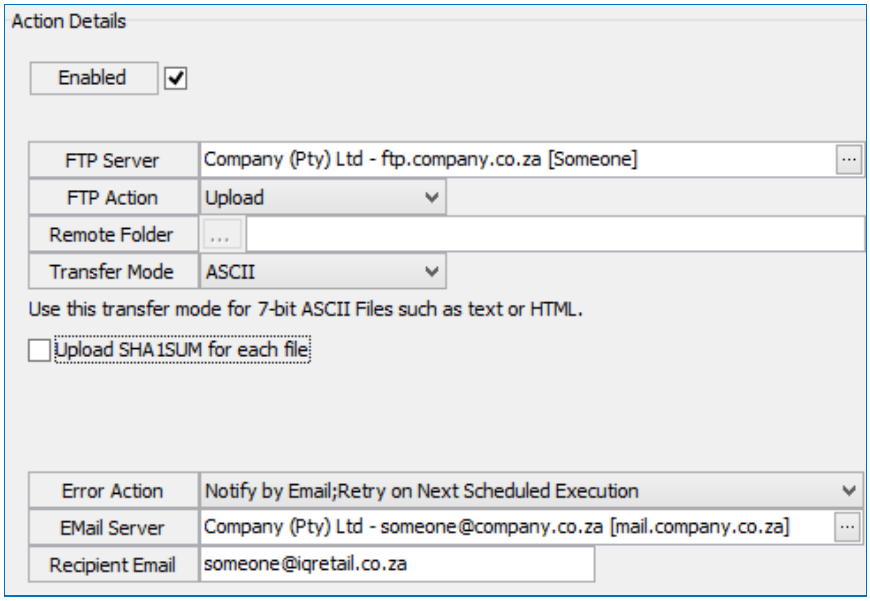
This option allows the user to select the email server to use when the notification is sent.

RECIPIENT EMAIL

The Recipient Email address allows the user to setup a specific email address to be used when the receiver of the email wants to return a message.

FTP

The FTP option allows the user to send the SQL query results via FTP to a specific folder on the ftp server, where in turn it may be downloaded again to view.



ENABLED

The enabled option allows the user to enable the specific action.

FTP SERVER

The FTP Server option allows the user to select any of the configured ftp servers to transfer the SQL query results to.

FTP ACTION

The FTP action allows the user to choose if the SQL Query results should be Uploaded or Downloaded to or from the FTP server.

REMOTE FOLDER

The Remote Folder is the folder that is accessible via ftp that is located on the ftp server. The results will be sent there automatically using this function.

TRANSFER MODE

The user has the option to choose between the ASCII or Binary format to transfer the results.

USE THE ASCII TRANSFER MODE FOR 7-BIT FILES SUCH AS TEXT OR HTML

Use the Binary transfer mode for 8-bit files such as executables, compressed folders, multimedia, etc.

UPLOAD SHA1SUM FOR EACH FILE

This option allows the user to load a checksum file with the SQL query results, to ensure that the content of the file doesn't change while it is being uploaded or downloaded.

ERROR ACTION

The Error Action allows the user to notify the user or receiver of the report by email if the SQL Query results was not uploaded or downloaded correctly. The user can also set IQ Automation to retry the ftp upload or download on the next scheduled execution.

EMAIL SERVER

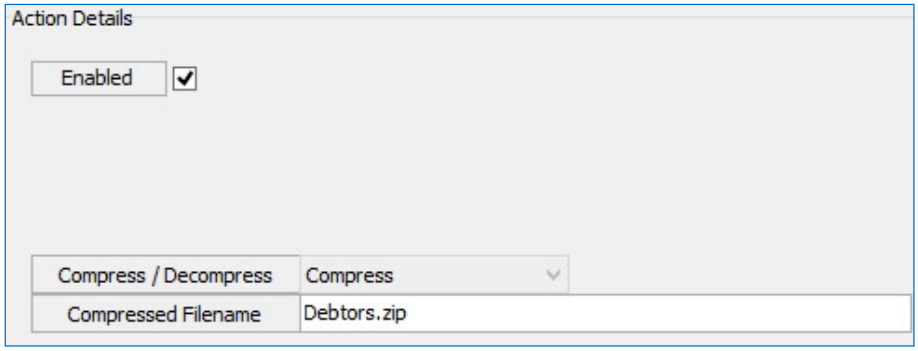
This will be the email server which should be used to notify the user or receiver if the ftp upload or download was not done correctly.

RECIPIENT EMAIL

This will be the email address of the user or the recipient who would be notified if the report was not upload or downloaded correctly.

COMPRESS

The Compress option allows the user to export the SQL query results into a compressed zip file. This means that the user is able to extract the created zip file and view the SQL query results.



ENABLED

The enable option allows the user to enable the specific action.

COMPRESS / DECOMPRESS

The Compress option allows the user to compress the file before saving it, into a .zip file. The Decompress option allows the user to decompress the file that was saved, to enable him to read or access the data.

COMPRESSED FILENAME

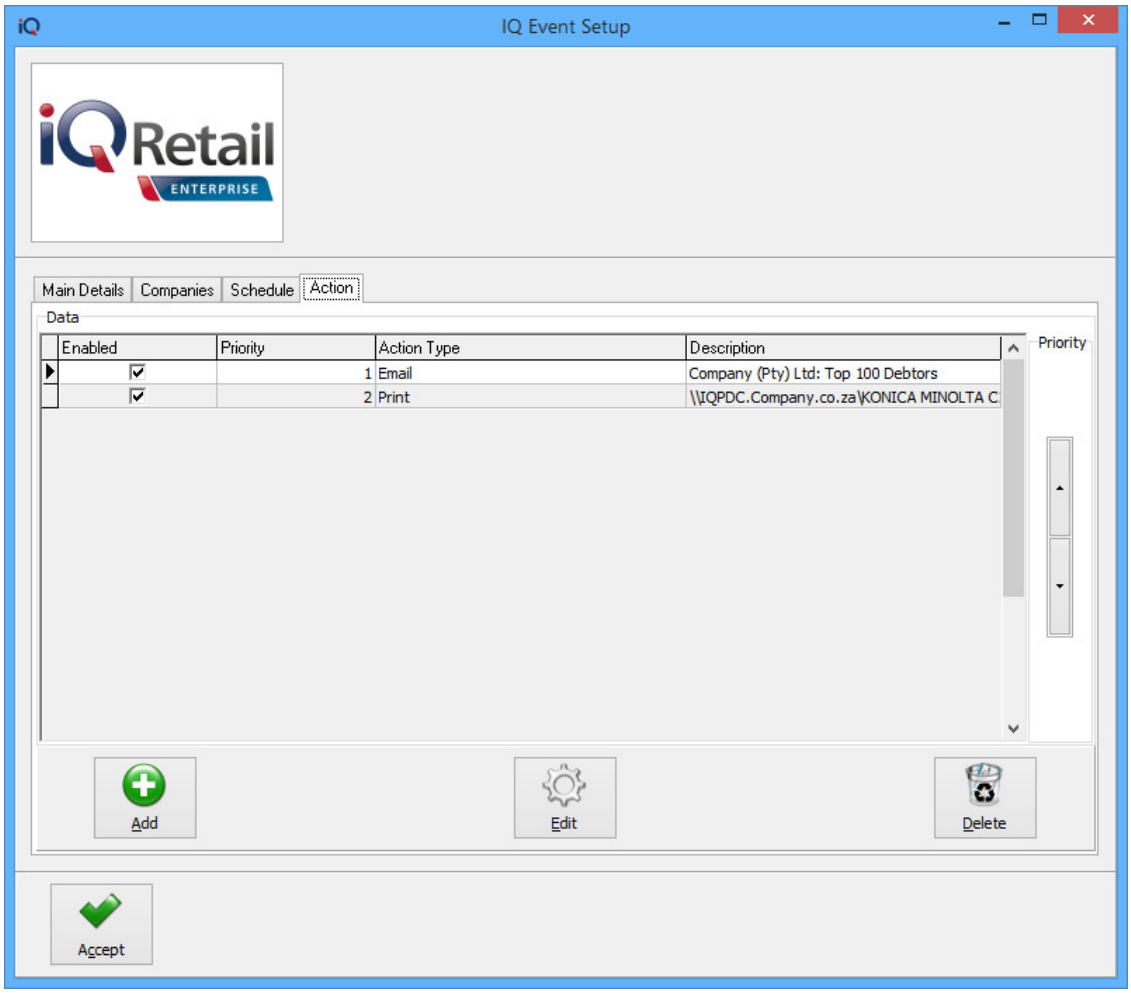
The Compressed Filename is the name that will be used on the server to save the compressed file, once the report has run.

ACCEPT

Select the Accept option to save any changes that have been made under the action tab in the event schedule screen.

SCHEDULED EVENT FINALISED

To finalise the scheduled event, ensure that the priority order is correct. This can be done by highlighting the specific action and then using the Priority Bar on the right hand side of the screen in order to set the priorities correctly.



IMPORTANT: When setting up the necessary actions for the scheduled event, make sure that the event actions are in the correct order. The order should be as follows, export the results first, and then the next action should be either to compress the results file or to send the result file out, via email.

If the priority of the event actions are not correct and first start with email, a blank email will be sent, and thereafter the rest of the actions.

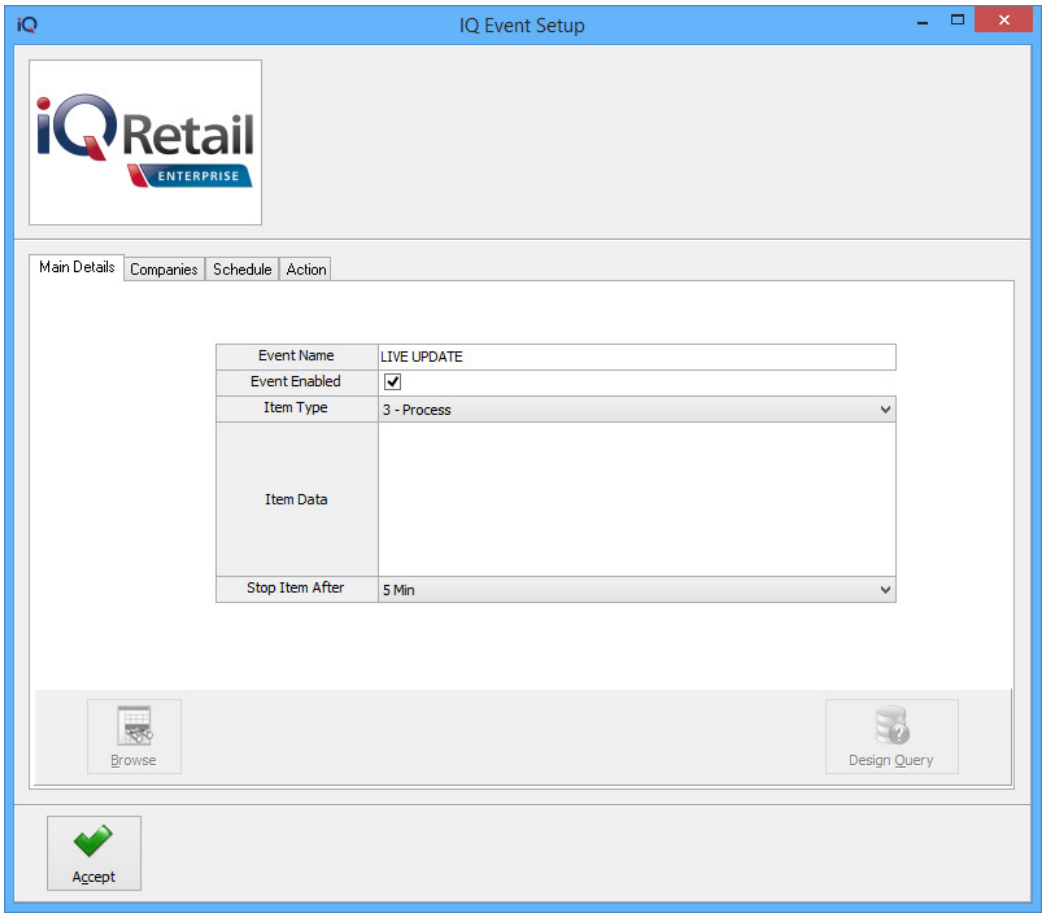
Select the Accept option to finalise the selected scheduled event.

SCHEDULED EVENTS USING THE PROCESS TYPE

IQ Automation can be used to do specified processing on the IQ system. Certain processes can be scheduled to run automatically in the background. This option can also be used to update information from or to third party systems, i.e. API, IQ Easy Pay, CRM and IQ One/One Loyalties.

NOTE: The user has to be very careful to schedule processes to run, as this can change the information on the system.

NOTE: If the user doesn't know what the result of a scheduled process will be, it should rather not be done. IQ Support can be contacted to assist with the scheduling of a process.



NOTE: When the IQ system is installed, there are a few System Events that are automatically generated. Certain options on these System Defined events cannot be customised and have been disabled to ensure optimum system performance.

MAIN DETAILS

EVENT NAME

The event name is where the user gives the specific event a name.

EVENT ENABLED

The event enable option allows the user to activate or deactivate a specific event. If the event is not enabled, the specific event will not be executed.

ITEM TYPE

The item type option allows the user to pick from 6 types; 0-None, 1-User/Custom Report, 2-SQL Script, **3-Process**, 4-IQ XML Exports and 5- IQ XML Imports.

To enable a process to be scheduled, select option **3 – Process**.

ITEM DATA

For Processing, the Item Data field remains empty.

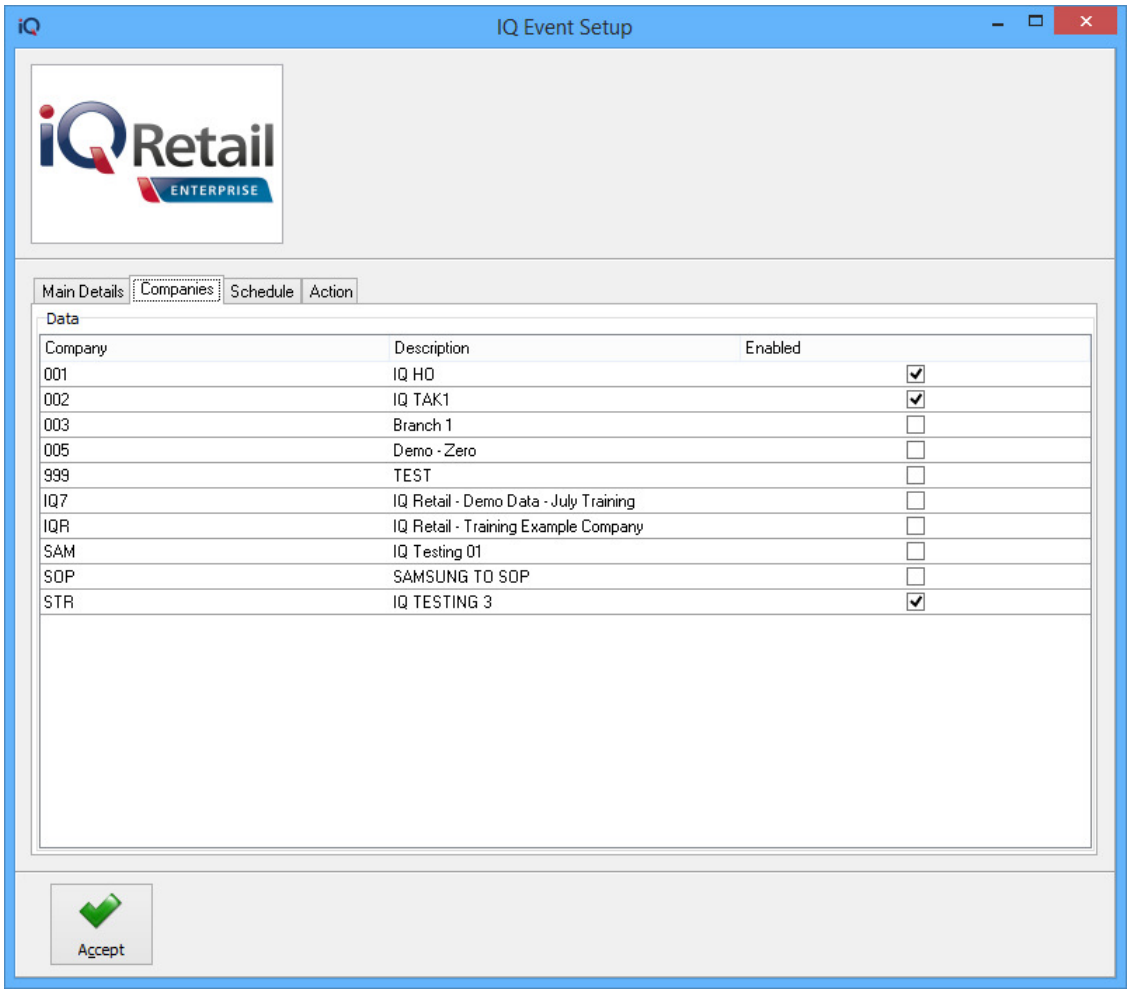
STOP ITEM AFTER

This option allows the user to specify when the event should stop. It is possible to let the event stop at previously setup time peroids, which can be selected from the drop down menu from 5 minutes to 4 hours.

IMPORTANT: The system defaults to 5 (five) minutes, when the N/A (Not Applicable) option is selected, as a safety precaution. If the event fails, no other scheduled events can be executed until the problematic one is stopped.

COMPANIES

Under the companies tab, the user needs to enable the scheduled event for a specific company. This can be done by selecting the enable option next to the company name.

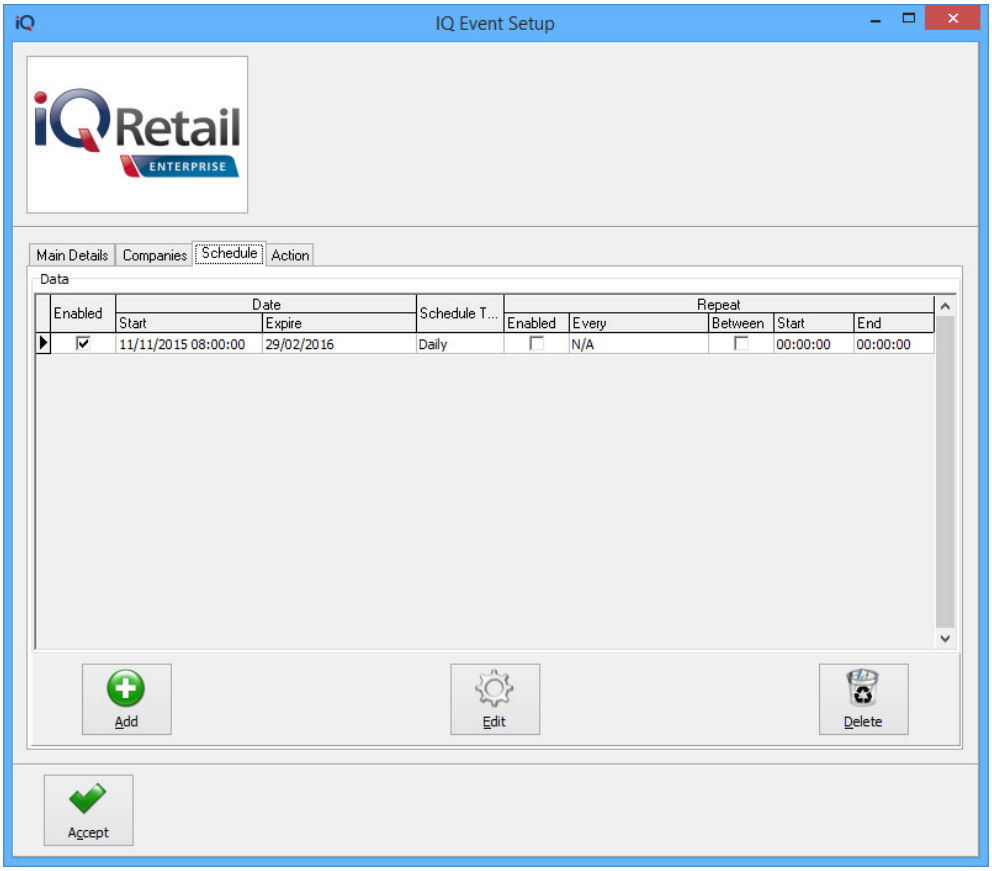


In the event where more than one company is enabled, each selected company's process will be executed separately.

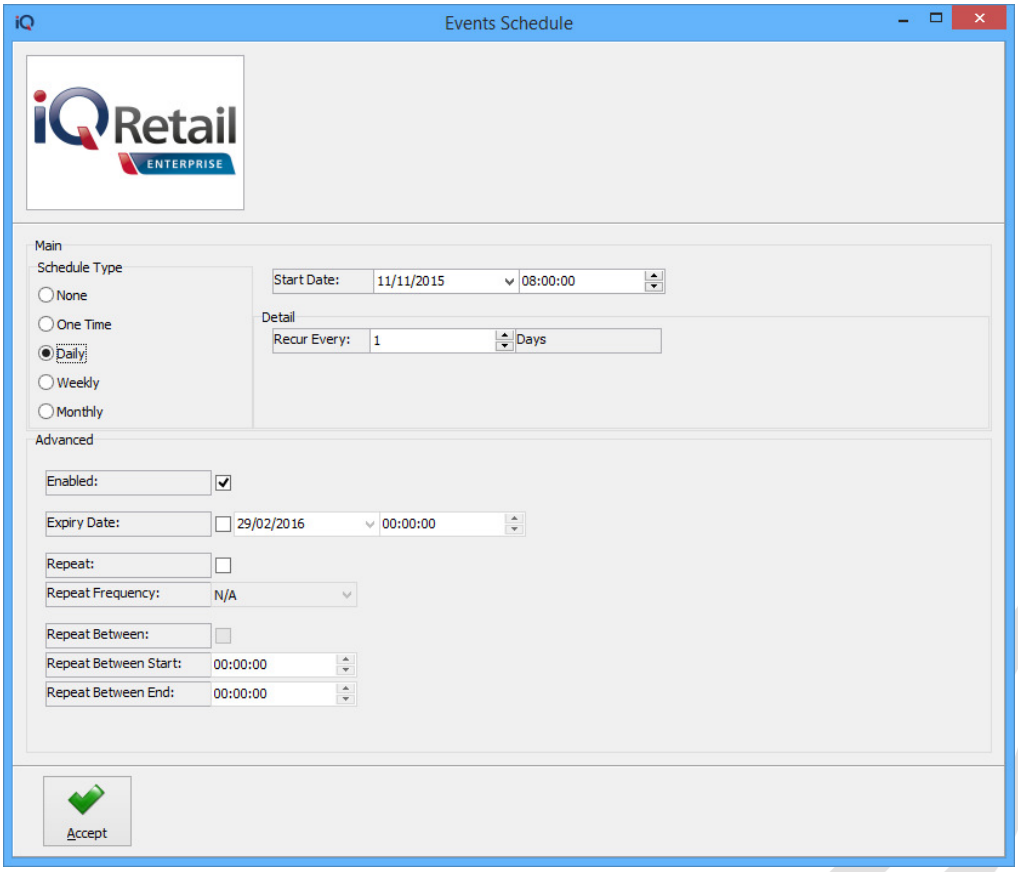
NOTE: Once the event is enabled for the specific company, proceed to the schedule tab.

SCHEDULE

Under the schedule tab the user is able to setup a specific schedule for the event. To create a schedule event, select the Add option.



NOTE: Selecting the add option allows the user to specify periods, dates and times for the event.



MAIN

SCHEDULE TYPE

The schedule type allows the user to choose the frequency of the event. There are 5 different frequency options that the user is able to choose from.

NONE

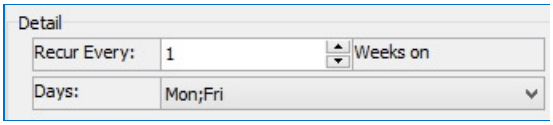
The None Option allows the user to disable the event and it will not be scheduled for any time at all.

ONE TIME

The One Time option will allow the user to schedule the event as a once off event.

DAILY

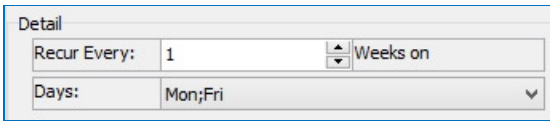
The Daily option allows the user to configure the scheduled event on a daily basis at a specific time.



NOTE: The user can select if the event should be executed every week or every second week and also which day of the week it should be executed.

WEEKLY

The Weekly option allows the user to configure the scheduled event per week.

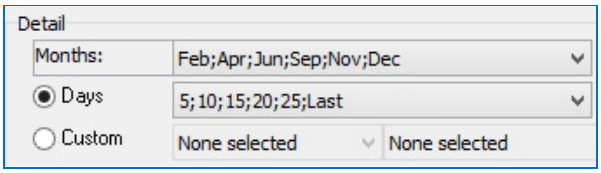


NOTE: If the Weekly option has been selected, further options become available.

NOTE: Now the user is able to select which weeks of the month and also the actual days within each week, the scheduled event should be executed.

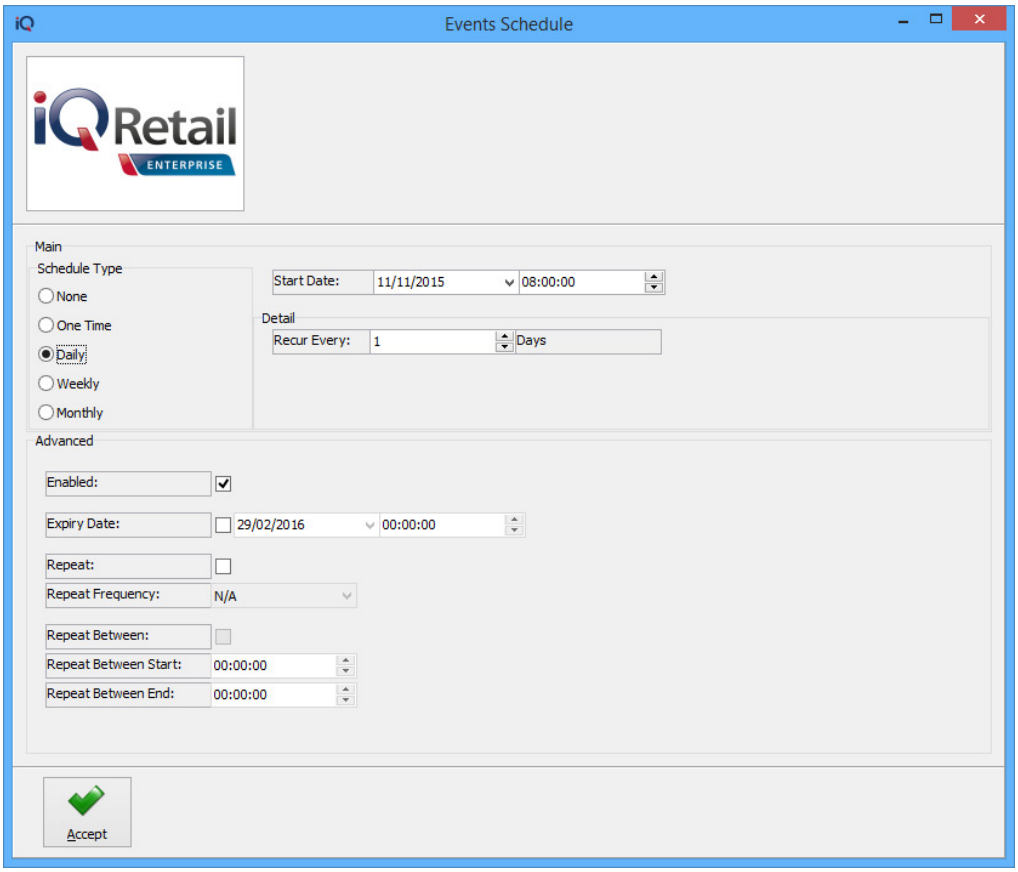
MONTHLY

The Monthly option allows the user to configure the scheduled event for specific months of the year.



NOTE: If the Monthly option has been selected, as in the example, further options become available.

NOTE: Now the user is able to select which months of the year and also the actual days within the months, the scheduled event should be executed.



ADVANCED

ENABLED

The Enabled option needs to be ticked; otherwise the scheduled event will not be executed. Make sure the scheduled event is enabled.

EXPIRY DATE

The Expiry date allows the user to specify when the configured scheduled event must expire. This option can be left open if there is no expiry date for the event.

REPEAT

The Repeat option allows the user to select the scheduled event to repeat every couple of minutes or hours. The range is between 5 minutes and 4 hours. The event will only be executed once within the date and time range, if there are no errors. It will only repeat within the date and time range, if the repeat option is enabled.

REPEAT FREQUENCY

The Repeat Frequency becomes available once the Repeat is enabled. The Repeat Frequency allows the user to specify when this scheduled event must repeat. This could be every 5 minutes, up to every 4 hours.

REPEAT BETWEEN

The Repeat Between option allows the user to specify if this scheduled event must repeat between specific times. Make sure this option is enabled if the event is being repeated between times.

REPEAT BETWEEN START

The Repeat Between Start allows the user to configure a specific repeat start time for the specific scheduled event.

REPEAT BETWEEN END

The Repeat Between End allows the user to configure a specific repeat end time for the specific scheduled event.

ADD

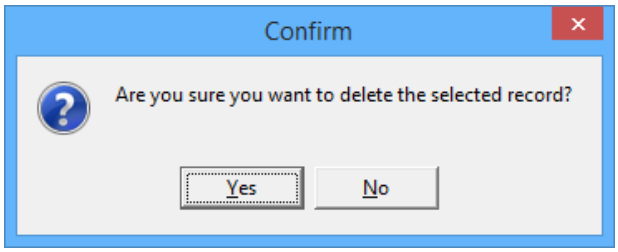
Select the Add option if any additional event scheduling options need to be added.

EDIT

Select the Edit option if any changes need to be made to any of the existing scheduled events.

DELETE

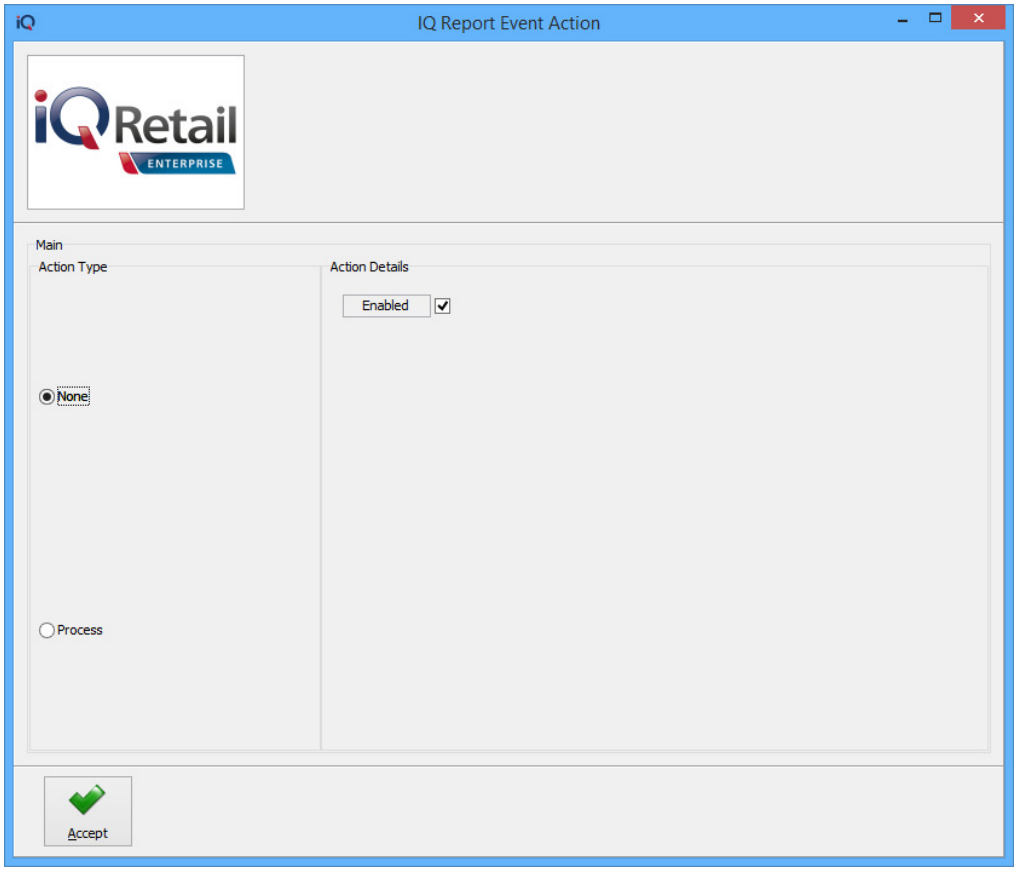
Select the Delete option if any of the existing event configurations should be deleted. By selecting the scheduled event and then clicking on the Delete button, a confirmation box will appear.



When the "**YES**" option is selected, the existing scheduled event will be permanently deleted.

ACTION

Under the Action tab, the user is able to set the desired action for a specific scheduled event. When scheduling a Process Type event, the user only has 2 options: None or Process.



MAIN

ACTION TYPE

The Main Action Type provides the user with actions to be used with the SQL query to execute the scheduled event.

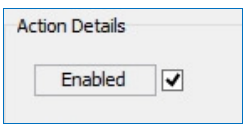
ACTION DETAILS

The Action Details provides the user with the option on what to do with the event results, where.

ACTION TYPES & THEIR APPROPRIATE DETAILS

NONE

The None action type means that no action will be taken on the scheduled event and there are no details.



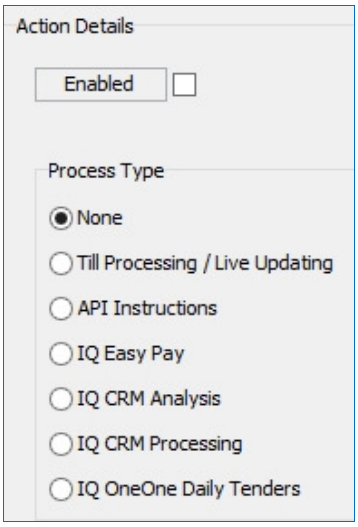
ENABLED

The enabled option allows the user to enable the specific action.

PROCESS

There are 7 Process Types from which the use can select.

ACTION DETAILS



ENABLED

The enabled option allows the user to enable the specific action.

PROCESS TYPE

NONE

The None option is a place holder and disables the event without deleting it.

TILL PROCESSING / LIVE UPDATING

This feature allows the user to disable the Live Updating under Point of Sale and rather enable it in IQ Automation via this option. IQ Automation will then perform Live updating on scheduled intervals during the day. This alleviates the "delayed" effect of Live Updating during the Sale Process.

The normal Point of Sale – End of Day process will perform Live Updating or Integration of any transactions that have not yet been integrated by the above automation event.

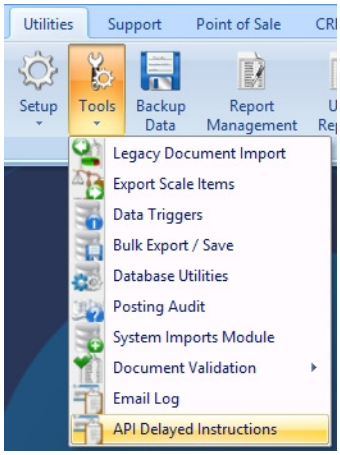
Example: You do 100 sales per hour, that is 800 sales per day. Live Updating via Automation can only integrate 50 sales per hour to the ledger / stock / debtors accounts. That means 400 sales per day and the End of Day will then integrate the other 400 at the time of doing the end of day.

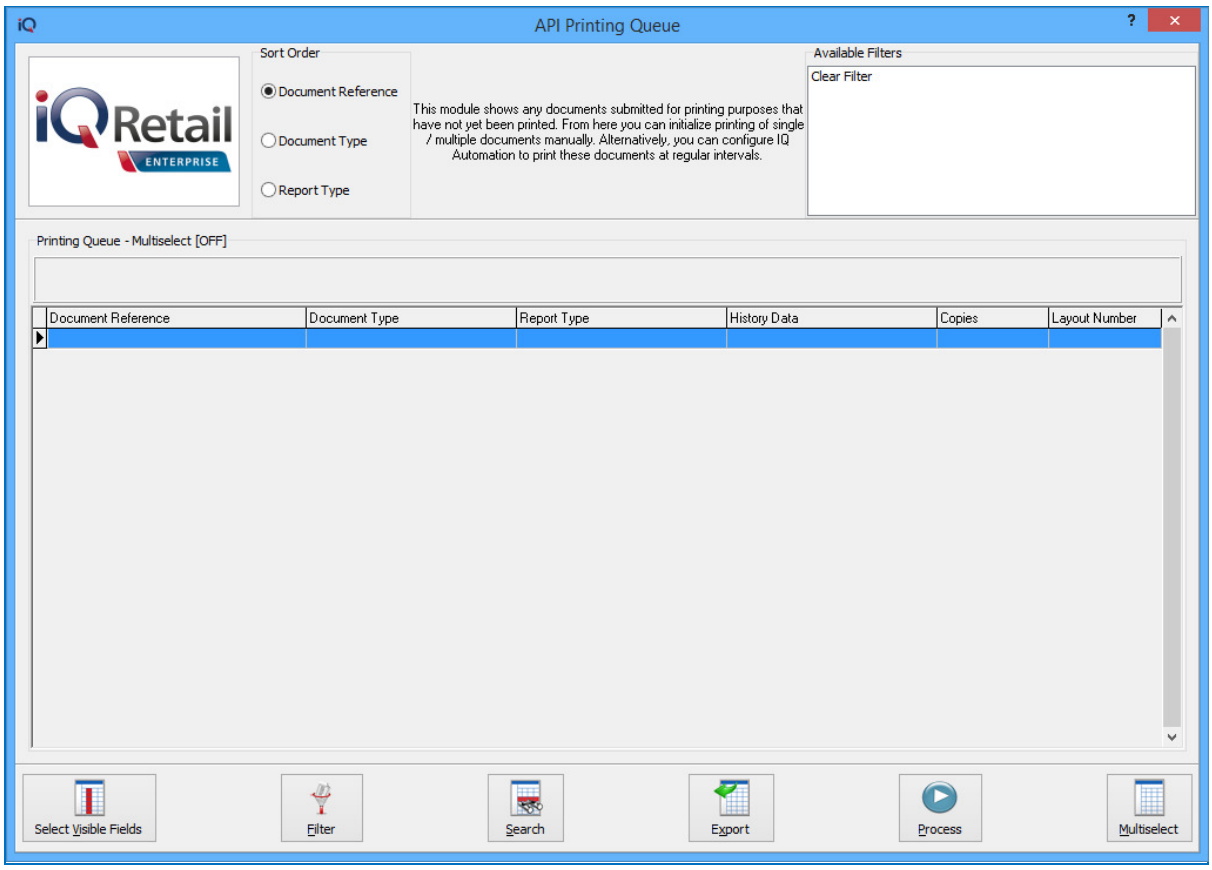
API INSTRUCTIONS

The IQ API serves as an integration layer or interface for third party integrators (mostly for software companies) to interact with the IQ Retail software package and database. Third party companies can submit documents (like Sales Orders) via our API. Together with this document submission, they can also submit related instructions (e.g. Printing the document, exporting or emailing the document). These instructions are cached in a data table (so as not to delay the API call or extend the

duration of the API call to the IQ software). These transactions are then processed on scheduled intervals by the IQ Automation Service.

Outstanding instructions can be viewed from within the IQ Enterprise system from the API Delayed Instructions menu under Utilities →Tools. The user can also force the execution of instructions from this module.





All the documents that were submitted for printing purposes, that have not yet been printed will be listed on the screen above. IQ Automation can be configured to print these documents at regular intervals, or they can be printed manually from this module.

IQ EASY PAY

Easy Pay is an independent service that facilitates the payment of accounts and the purchase of prepaid electricity on this site or at a variety of retail pay-points nationwide. This event should be set up as a daily event. This event will send all TV License related purchase information to the EasyPay server. Server details and filename conventions are determined by the details set up under the EasyPay Socket Service under Module Parameters in IQ Enterprise.

IQ CRM ANALYSIS

This is the first step in the CRM automated process. This event examines various tables and generated data for emails and SMS messages. Data is analysed according to CRM Campaigns and Profiles as set up in IQ Enterprise.

IQ CRM PROCESSING

This is the second step in the CRM automated process. The event uses data from the previous (analysis) event and performs either the sending of SMS or generation of emails and places the emails in the IQ Email Outbox. The IQEmailOutbox event will send theses email messages as per usual.

IQ ONEONE DAILY TENDERS

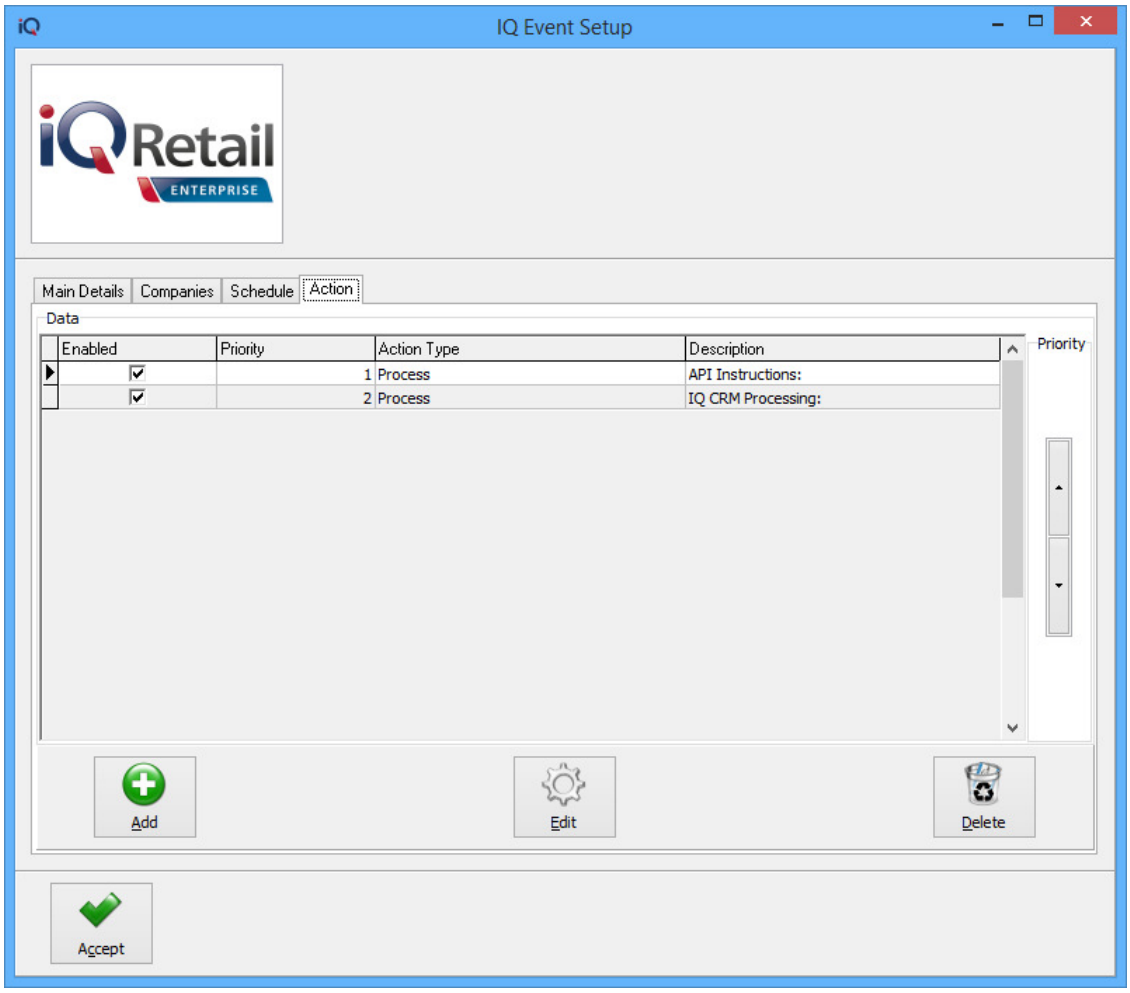
This event is **not yet implemented**. The purpose would be to send the Daily Sales and Tender figures to the OneOne email server.

ACCEPT

Select the Accept option to save any changes that have been made under the action tab in the event schedule screen.

SCHEDULED EVENT FINALISED

To finalise the scheduled event, ensure that the priority order is correct. This can be done by highlighting the specific action and then using the Priority Bar on the right hand side of the screen in order to set the priorities correctly.



IMPORTANT: When setting up the necessary actions for the scheduled event, make sure that the event actions are in the correct order. The order should be as follows, export the results first, and then the next action should be either to compress the results file or to send the result file out, via email.

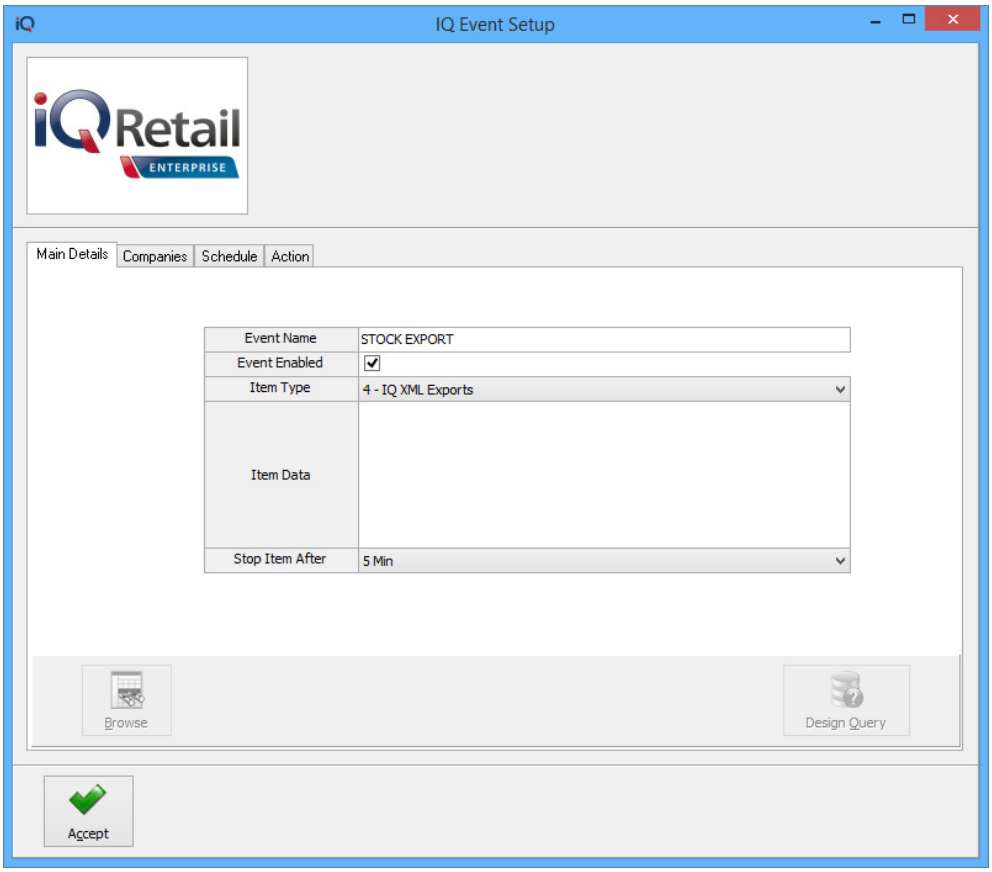
If the priority of the event actions are not correct and first start with email, a blank email will be sent, and thereafter the rest of the actions.

Select the Accept option to finalise the selected scheduled event.

SCHEDULED EVENTS USING THE IQ XML EXPORTS TYPE

IQ Automation can be used to do specified processing on the IQ system.

This feature allows the user to specify the Export parameters and to generate IQ XML Export files based on existing data. The Export function supports Stock, Debtor and Creditor Master Files and also supports Processing Documents (Sales orders, purchase Orders, Job Cards and Quotes).



MAIN DETAILS

EVENT NAME

The event name is where the user gives the specific event a name.

EVENT ENABLED

The event enable option allows the user to activate or deactivate a specific event. If the event is not enabled, the specific event will not be executed.

ITEM TYPE

The item type option allows the user to pick from 6 types; 0-None, 1-User/Custom Report, 2-SQL Script, 3-Process, **4-IQ XML Exports** and 5- IQ XML Imports.

To enable a process to be scheduled, select option **4-IQ XML Exports**.

ITEM DATA

For Processing, the Item Data field remains empty.

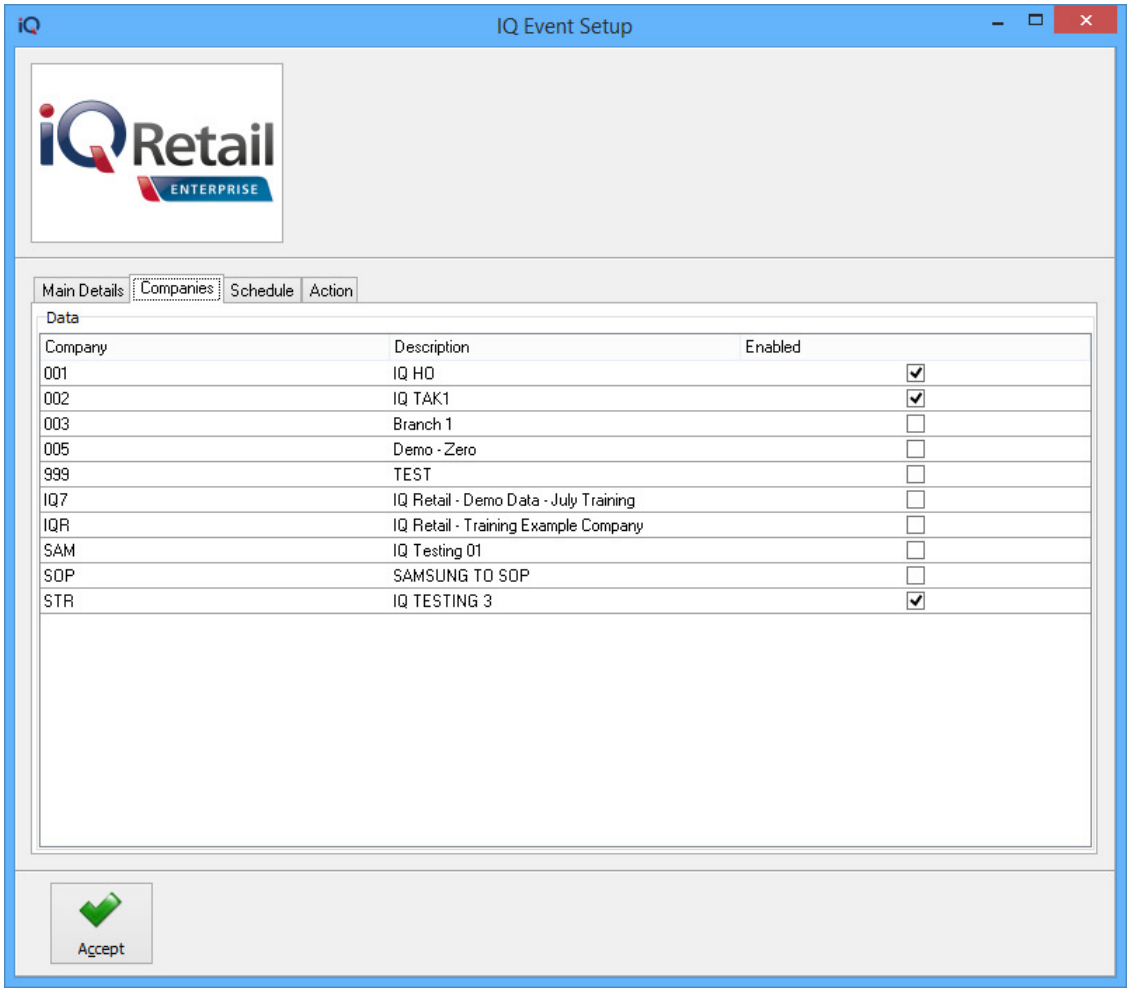
STOP ITEM AFTER

This option allows the user to specify when the event should stop. It is possible to let the event stop at previously setup time peroids, which can be selected from the drop down menu from 5 minutes to 4 hours.

IMPORTANT: The system defaults to 5 (five) minutes, when the N/A (Not Applicable) option is selected, as a safety precaution. If the event fails, no other scheduled events can be executed until the problematic one is stopped.

COMPANIES

Under the companies tab, the user needs to enable the scheduled event for a specific company. This can be done by selecting the enable option next to the company name.

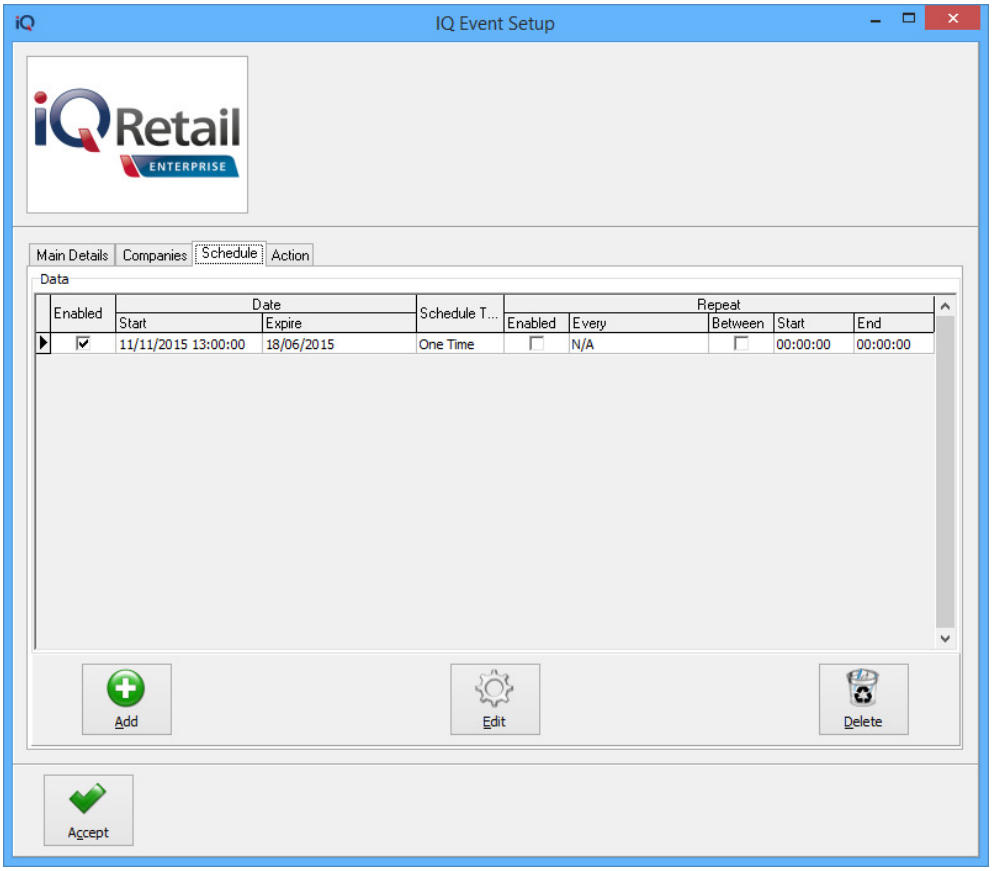


In the event where more than one company is enabled, each selected company's process will be executed separately.

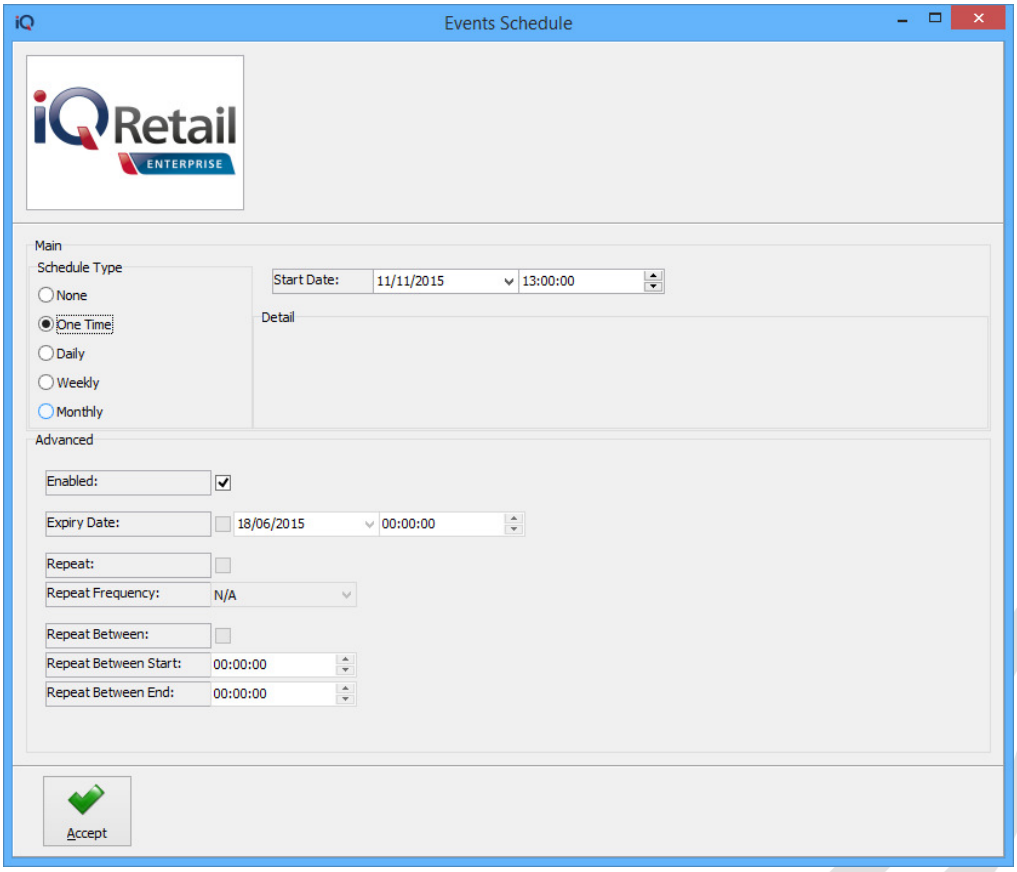
NOTE: Once the event is enabled for the specific company, proceed to the schedule tab.

SCHEDULE

Under the schedule tab the user is able to setup a specific schedule for the event. To create a schedule event, select the Add option.



NOTE: Selecting the add option allows the user to specify periods, dates and times for the event.



MAIN

SCHEDULE TYPE

The schedule type allows the user to choose the frequency of the event. There are 5 different frequency options that the user is able to choose from.

NONE

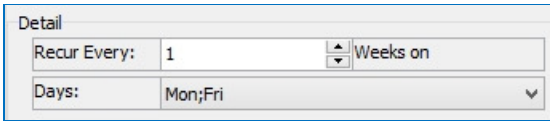
The None Option allows the user to disable the event and it will not be scheduled for any time at all.

ONE TIME

The One Time option will allow the user to schedule the event as a once off event.

DAILY

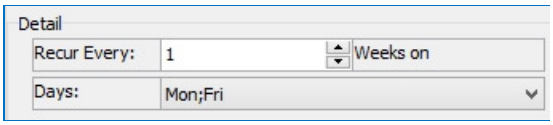
The Daily option allows the user to configure the scheduled event on a daily basis at a specific time.



NOTE: The user can select if the event should be executed every week or every second week and also which day of the week it should be executed.

WEEKLY

The Weekly option allows the user to configure the scheduled event per week.

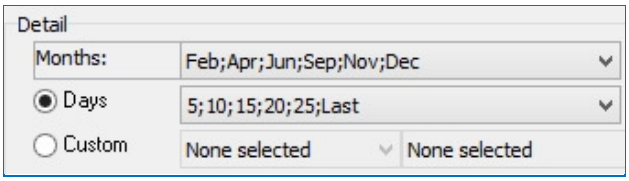


NOTE: If the Weekly option has been selected, further options become available.

NOTE: Now the user is able to select which weeks of the month and also the actual days within each week, the scheduled event should be executed.

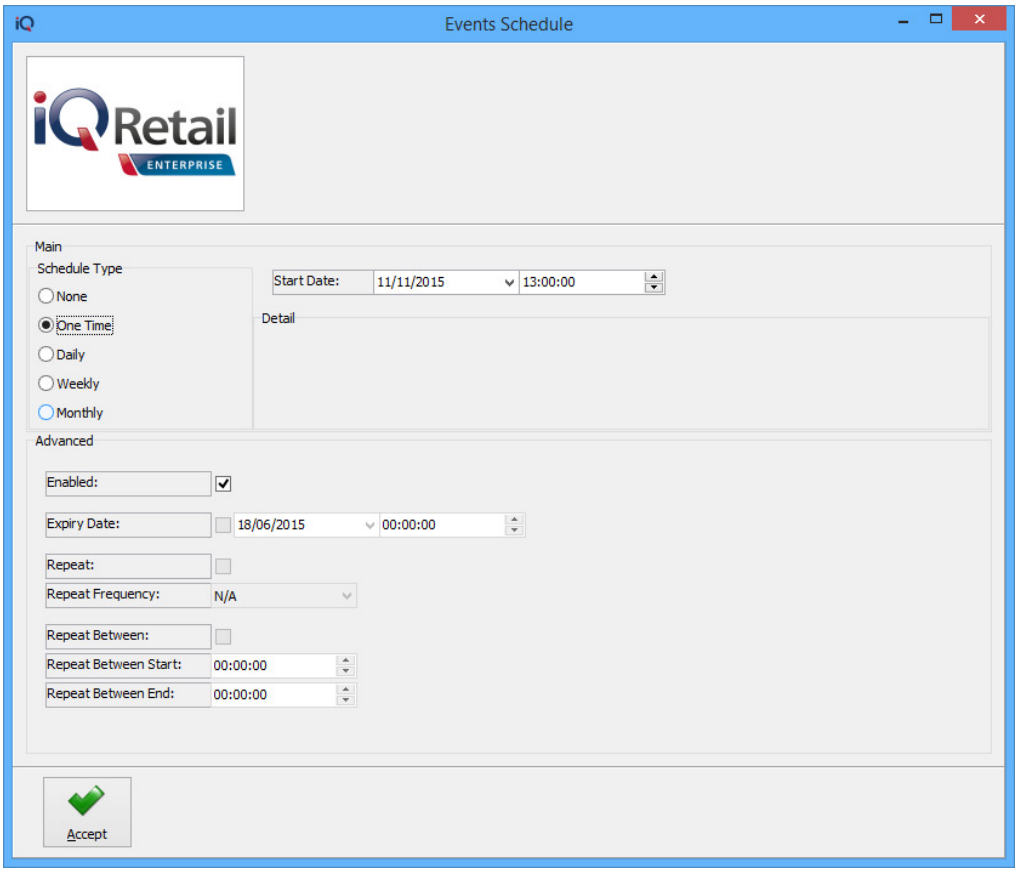
MONTHLY

The Monthly option allows the user to configure the scheduled event for specific months of the year.



NOTE: If the Monthly option has been selected, as in the example, further options become available.

NOTE: Now the user is able to select which months of the year and also the actual days within the months, the scheduled event should be executed.



ADVANCED

ENABLED

The Enabled option needs to be ticked; otherwise the scheduled event will not be executed. Make sure the scheduled event is enabled.

EXPIRY DATE

The Expiry date allows the user to specify when the configured scheduled event must expire. This option can be left open if there is no expiry date for the event.

REPEAT

The Repeat option allows the user to select the scheduled event to repeat every couple of minutes or hours. The range is between 5 minutes and 4 hours. The event will only be executed once within the date and time range, if there are no errors. It will only repeat within the date and time range, if the repeat option is enabled.

REPEAT FREQUENCY

The Repeat Frequency becomes available once the Repeat is enabled. The Repeat Frequency allows the user to specify when this scheduled event must repeat. This could be every 5 minutes, up to every 4 hours.

REPEAT BETWEEN

The Repeat Between option allows the user to specify if this scheduled event must repeat between specific times. Make sure this option is enabled if the event is being repeated between times.

REPEAT BETWEEN START

The Repeat Between Start allows the user to configure a specific repeat start time for the specific scheduled event.

REPEAT BETWEEN END

The Repeat Between End allows the user to configure a specific repeat end time for the specific scheduled event.

ADD

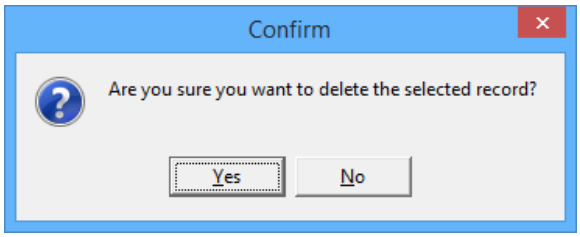
Select the Add option if any additional event scheduling options need to be added.

EDIT

Select the Edit option if any changes need to be made to any of the existing scheduled events.

DELETE

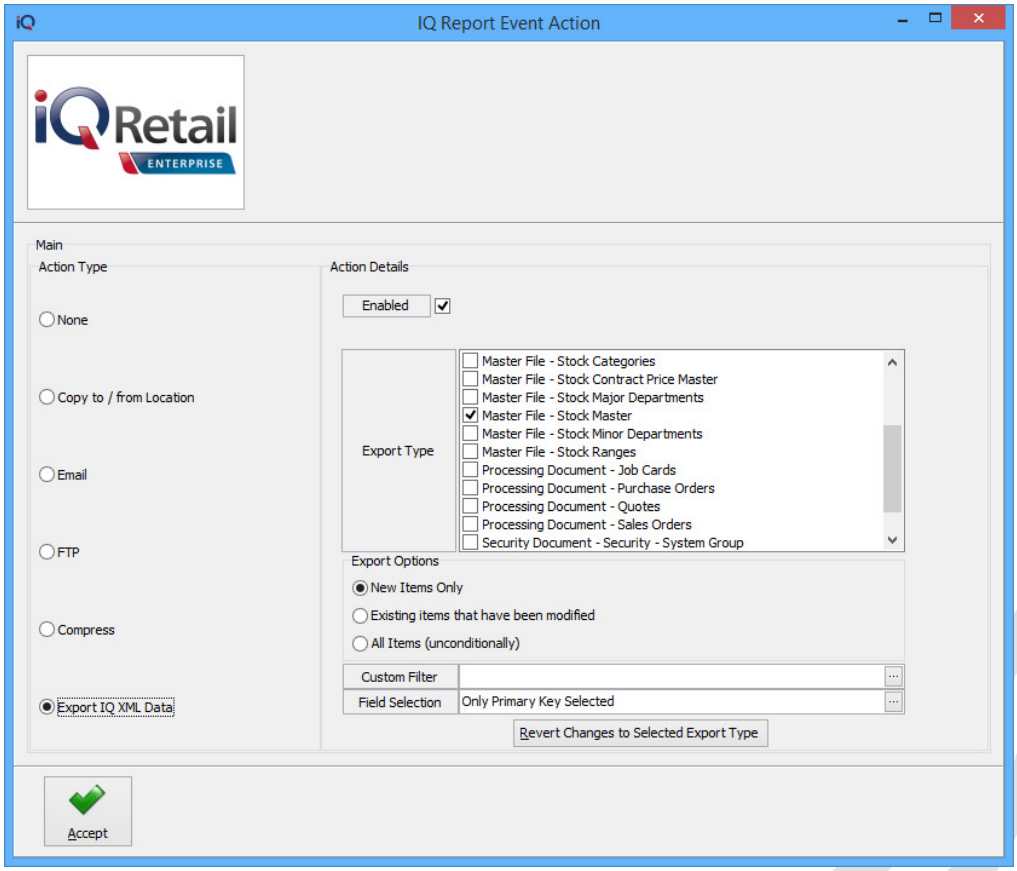
Select the Delete option if any of the existing event configurations should be deleted. By selecting the scheduled event and then clicking on the Delete button, a confirmation box will appear.



When the "**YES**" option is selected, the existing scheduled event will be permanently deleted.

ACTION

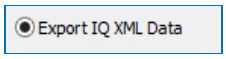
Under the Action tab, the user is able to set the desired action for a specific scheduled event. When scheduling a Process Type event, the user only has 2 options: None or Process.



MAIN

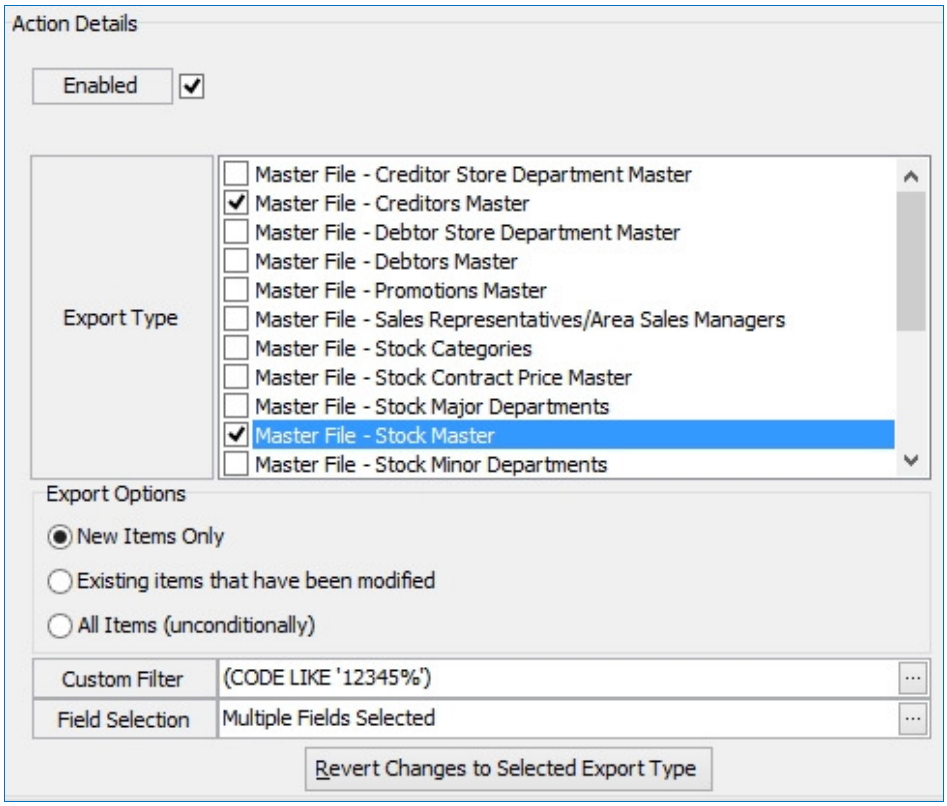
ACTION TYPE

In order for the Export IQ XML event type to work, the user has to select the "Export IQ XML Data" option under Action Types.



ACTION DETAILS

The Action Details provides the user with the option on which table and which fields in the table to export.



ENABLED

The enabled option allows the user to enable the specific action. The action has to be enabled to be executed.

EXPORT TYPE

Master files for Creditors, Debtors and Stock, Processing Documents (Job Cards, Purchase Orders, Quotes and Sales Orders) and Security documents are listed for selection.

Select the file that needs to be exported, by ticking the box next to the specific file.

EXPORT OPTIONS

The user has the option to select which of the records within the files need to be exported.

NEW ITEMS ONLY

The user has the option to export only the new items that were added in the selected table, since the last export..

EXISTING ITEMS THAT HAVE BEEN MODIFIED

The user also has the option to export all the existing items that have been modified, since the last export.

ALL ITEMS (UNCONDITIONALLY)

This option allows the user to export all the items in the selected table.

CUSTOM FILTER

The Export option also allows the user to specify a custom filter for the specific export type.

FIELD SELECTION

The Field selection option allows the user to select the fields in the table that should be exported.

REVERT CHANGES TO SELECTED EXPORT TYPE

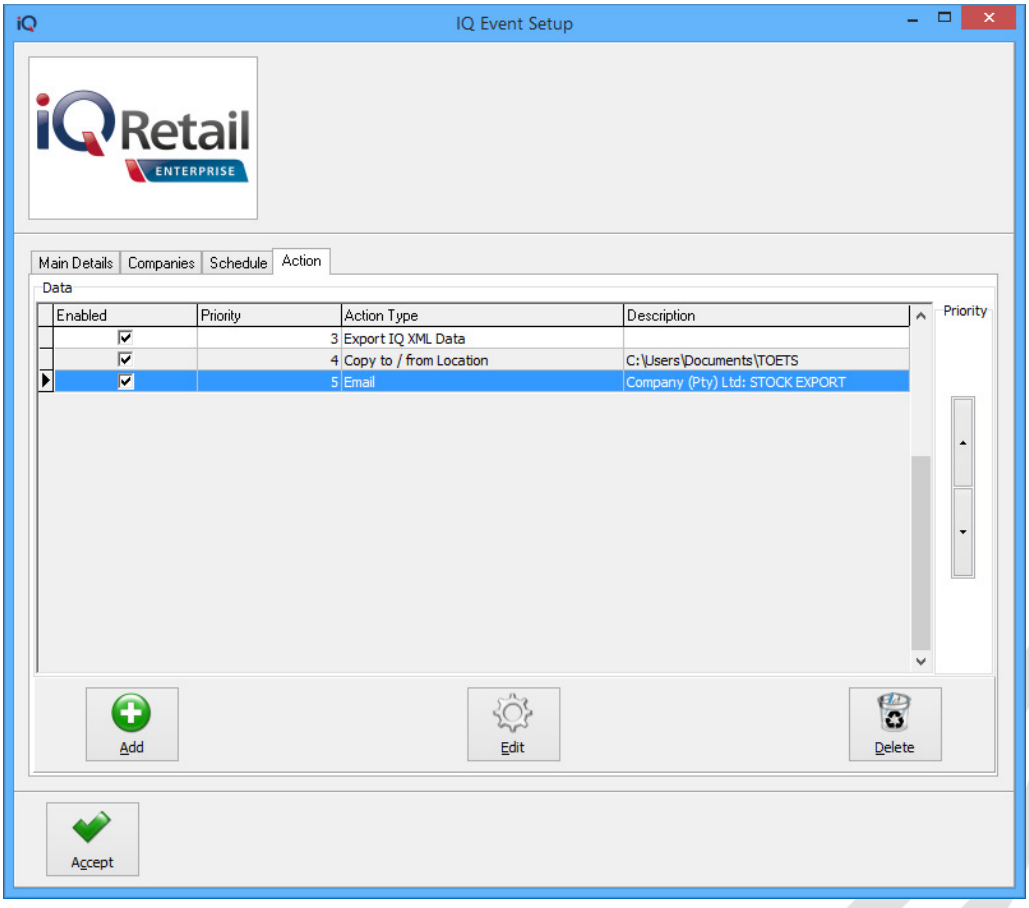
This option allows the user to go back to or return to the former saved information, after changes were made for the specific export type.

ACCEPT

Select the Accept option to save any changes that have been made under the action tab in the event schedule screen.

SCHEDULED EVENT FINALISED

To finalise the scheduled event, ensure that the priority order is correct. This can be done by highlighting the specific action and then using the Priority Bar on the right hand side of the screen in order to set the priorities correctly.



IMPORTANT: When setting up the necessary actions for the scheduled event, make sure that the event actions are in the correct order. The order should be as follows, export the results first, and then the next action should be either to compress the results file or to send the result file out, via email.

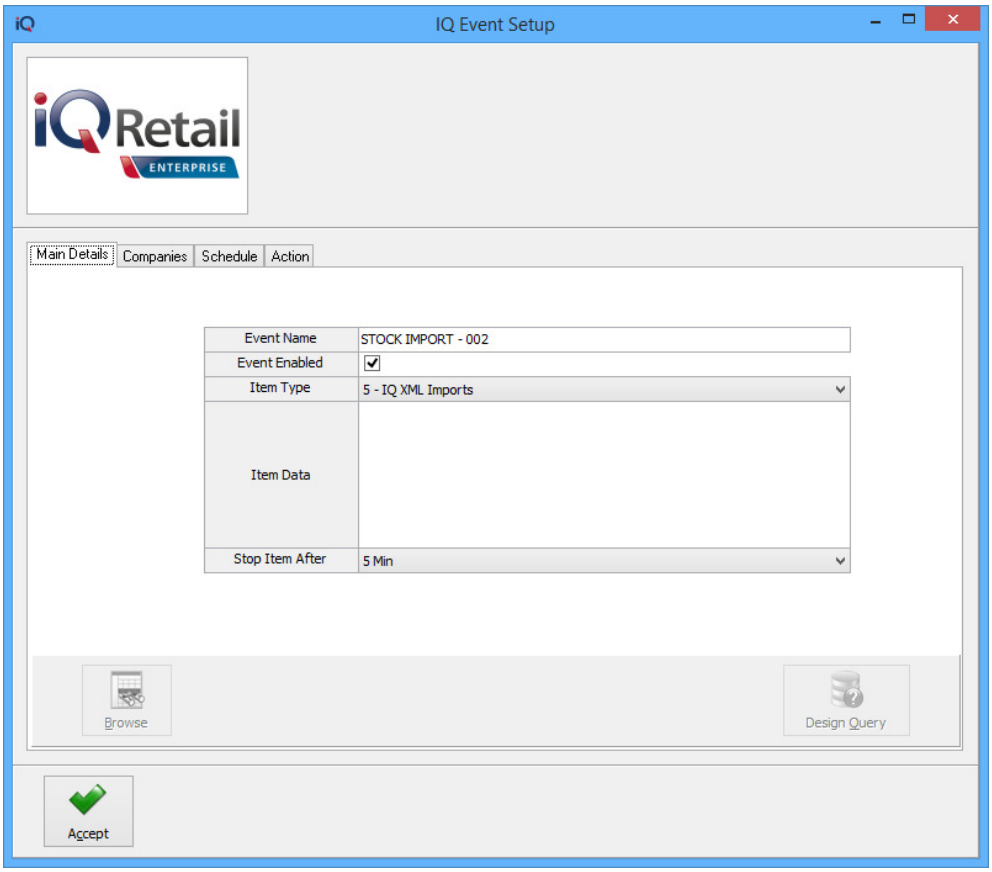
If the priority of the event actions are not correct and first start with email, a blank email will be sent, and thereafter the rest of the actions.

Select the Accept option to finalise the selected scheduled event.

SCHEDULED EVENTS USING THE IQ XML IMPORTS TYPE

IQ Automation can be used to do specified processing on the IQ system.

This action allows the user to automatically import IQ XML documents. By default this event type will show From Source when the Import Event Type has been selected. This action allows the user to get / retrieve a file at another location. For multiple files, the user needs to add multiple Copy From Actions.



MAIN DETAILS

EVENT NAME

The event name is where the user gives the specific event a name.

EVENT ENABLED

The event enable option allows the user to activate or deactivate a specific event. If the event is not enabled, the specific event will not be executed.

ITEM TYPE

The item type option allows the user to pick from 6 types; 0-None, 1-User/Custom Report, 2-SQL Script, 3-Process, 4-IQ XML Exports and **5- IQ XML Imports**.

To enable a process to be scheduled, select option **5 – IQ XML Imports**.

ITEM DATA

For Processing, the Item Data field remains empty.

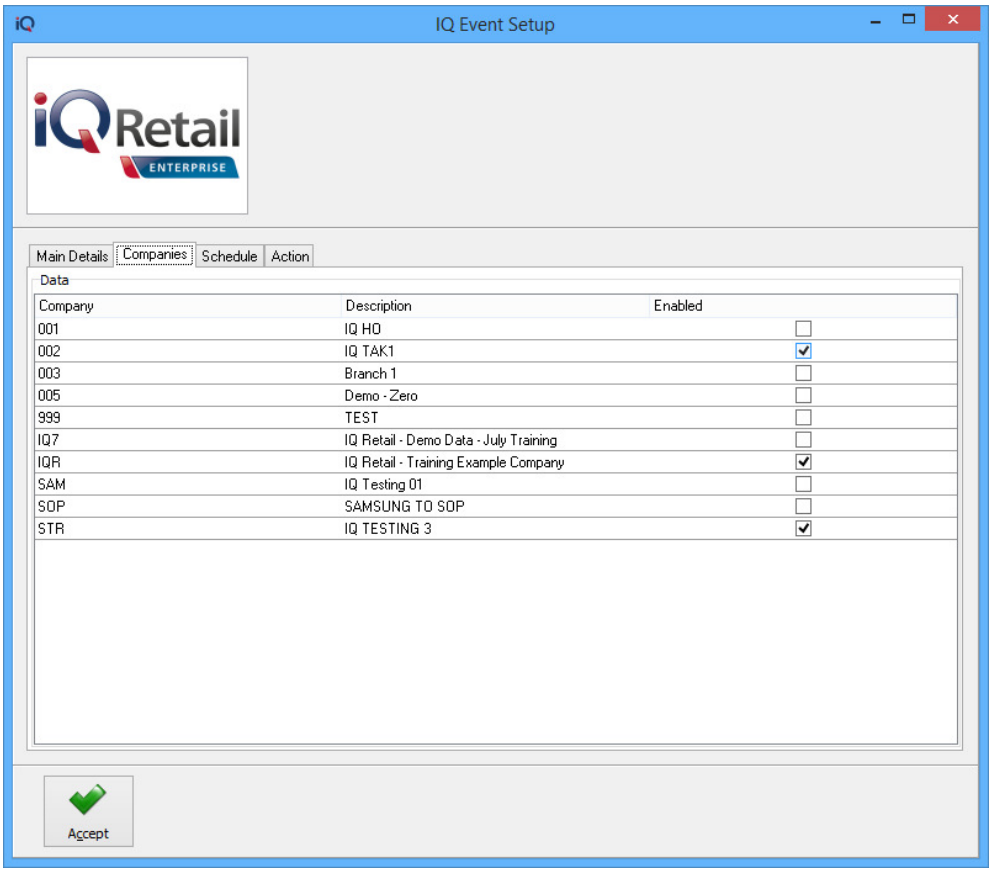
STOP ITEM AFTER

This option allows the user to specify when the event should stop. It is possible to let the event stop at previously setup time peroids, which can be selected from the drop down menu from 5 minutes to 4 hours.

IMPORTANT: The system defaults to 5 (five) minutes, when the N/A (Not Applicable) option is selected, as a safety precaution. If the event fails, no other scheduled events can be executed until the problematic one is stopped.

COMPANIES

Under the companies tab, the user needs to enable the scheduled event for a specific company. This can be done by selecting the enable option next to the company name.

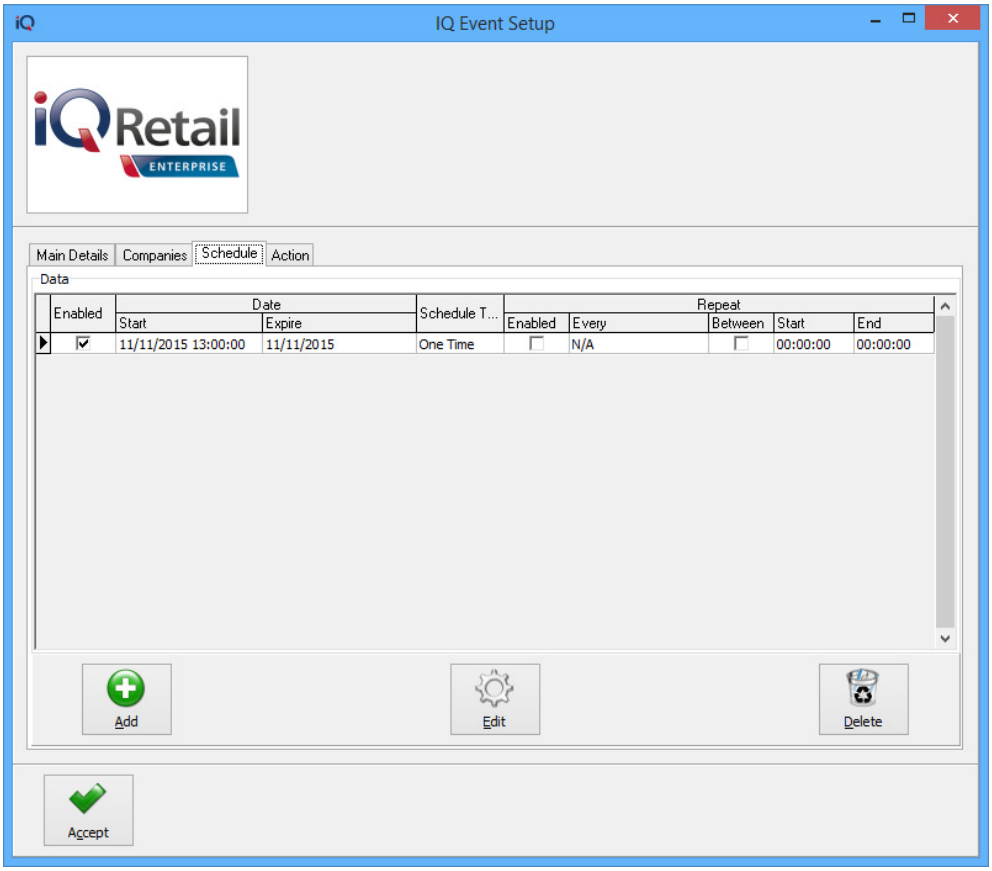


In the event where more than one company is enabled, each selected company's process will be executed separately.

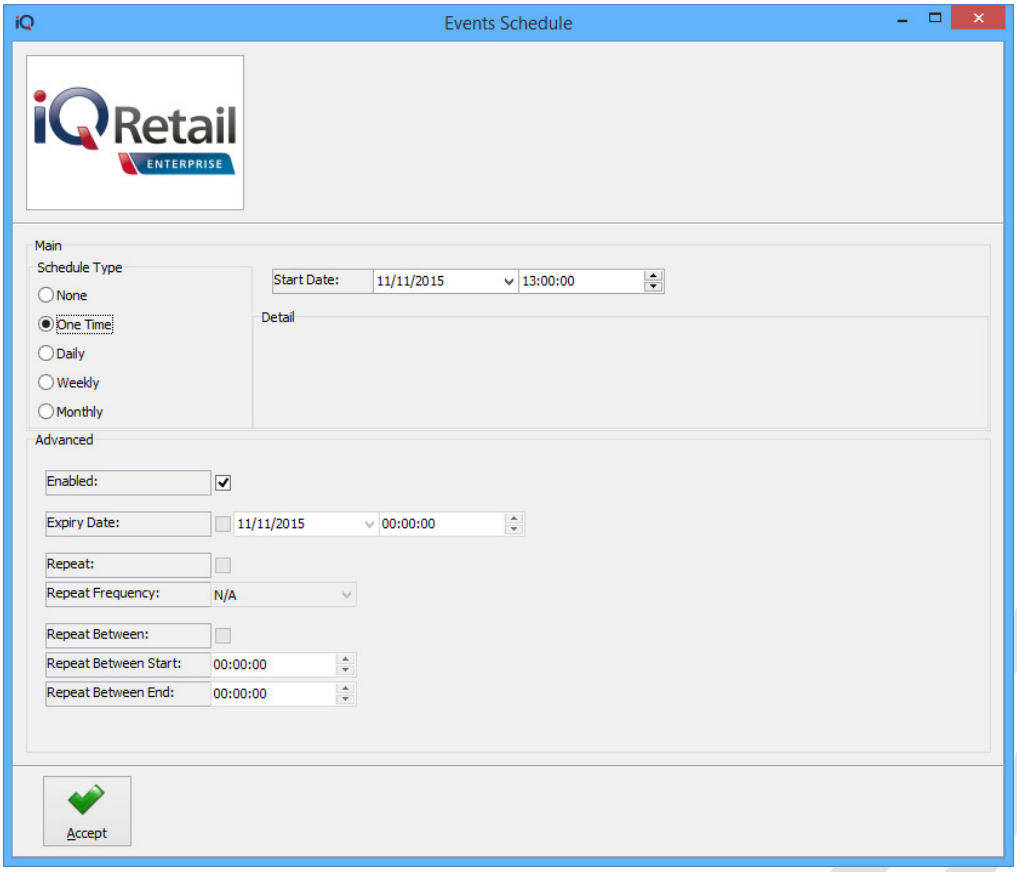
NOTE: Once the event is enabled for the specific company, proceed to the schedule tab.

SCHEDULE

Under the schedule tab the user is able to setup a specific schedule for the event. To create a schedule event, select the Add option.



NOTE: Selecting the add option allows the user to specify periods, dates and times for the event.



MAIN

SCHEDULE TYPE

The schedule type allows the user to choose the frequency of the event. There are 5 different frequency options that the user is able to choose from.

NONE

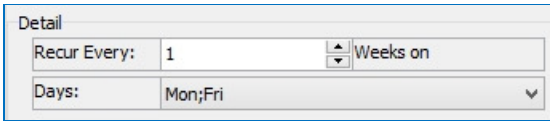
The None Option allows the user to disable the event and it will not be scheduled for any time at all.

ONE TIME

The One Time option will allow the user to schedule the event as a once off event.

DAILY

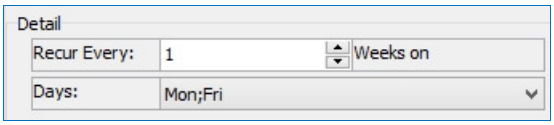
The Daily option allows the user to configure the scheduled event on a daily basis at a specific time.



NOTE: The user can select if the event should be executed every week or every second week and also which day of the week it should be executed.

WEEKLY

The Weekly option allows the user to configure the scheduled event per week.

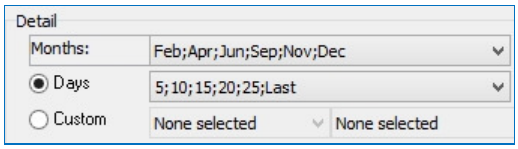


NOTE: If the Weekly option has been selected, further options become available.

NOTE: Now the user is able to select which weeks of the month and also the actual days within each week, the scheduled event should be executed.

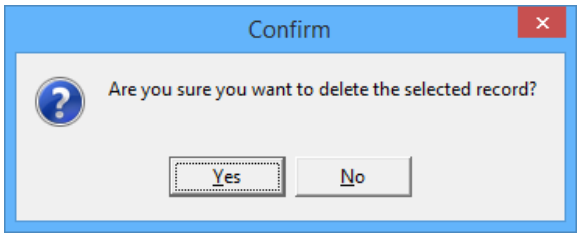
MONTHLY

The Monthly option allows the user to configure the scheduled event for specific months of the year.



NOTE: If the Monthly option has been selected, as in the example, further options become available.

NOTE: Now the user is able to select which months of the year and also the actual days within the months, the scheduled event should be executed.



ADVANCED

ENABLED

The Enabled option needs to be ticked; otherwise the scheduled event will not be executed. Make sure the scheduled event is enabled.

EXPIRY DATE

The Expiry date allows the user to specify when the configured scheduled event must expire. This option can be left open if there is no expiry date for the event.

REPEAT

The Repeat option allows the user to select the scheduled event to repeat every couple of minutes or hours. The range is between 5 minutes and 4 hours. The event will only be executed once within the date and time range, if there are no errors. It will only repeat within the date and time range, if the repeat option is enabled.

REPEAT FREQUENCY

The Repeat Frequency becomes available once the Repeat is enabled. The Repeat Frequency allows the user to specify when this scheduled event must repeat. This could be every 5 minutes, up to every 4 hours.

REPEAT BETWEEN

The Repeat Between option allows the user to specify if this scheduled event must repeat between specific times. Make sure this option is enabled if the event is being repeated between times.

REPEAT BETWEEN START

The Repeat Between Start allows the user to configure a specific repeat start time for the specific scheduled event.

REPEAT BETWEEN END

The Repeat Between End allows the user to configure a specific repeat end time for the specific scheduled event.

ADD

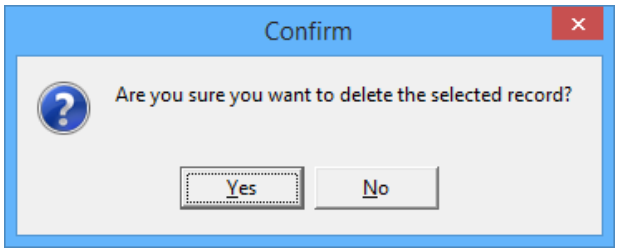
Select the Add option if any additional event scheduling options need to be added.

EDIT

Select the Edit option if any changes need to be made to any of the existing scheduled events.

DELETE

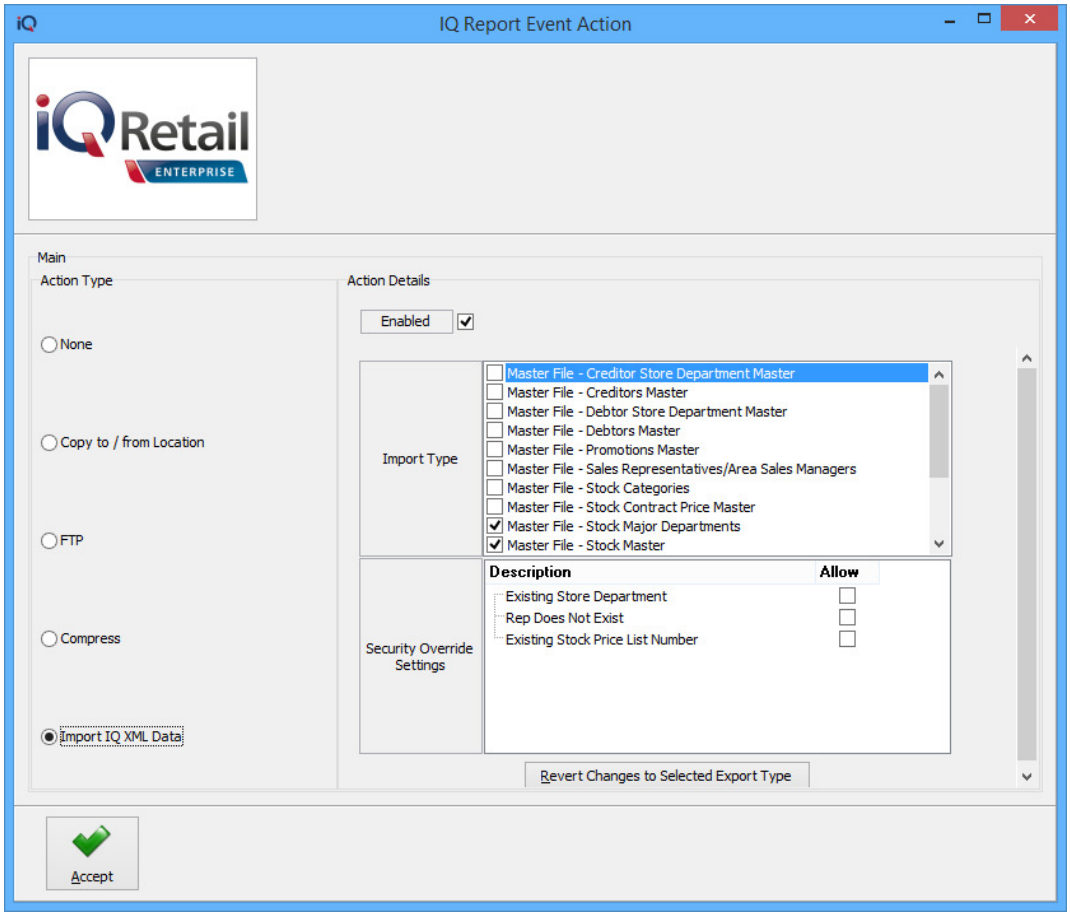
Select the Delete option if any of the existing event configurations should be deleted. By selecting the scheduled event and then clicking on the Delete button, a confirmation box will appear.



When the "**YES**" option is selected, the existing scheduled event will be permanently deleted.

ACTION

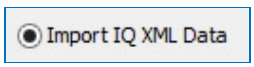
Under the Action tab, the user is able to set the desired action for a specific scheduled event. When scheduling a Process Type event, the user only has 2 options: None or Process.



MAIN

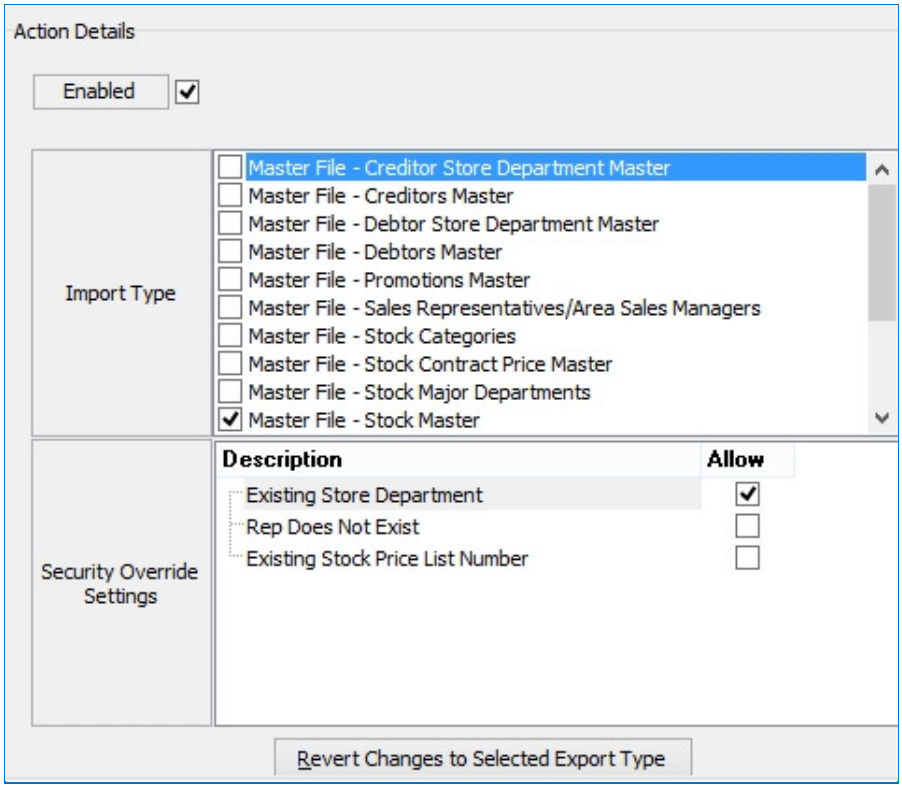
ACTION TYPE

In order for the Import IQ XML event type to work, the user has to select the "Import IQ XML Data" option under Action Types.



ACTION DETAILS

The Action Details provides the user with the option on which table and which fields in the table to import.



ENABLED

The enabled option allows the user to enable the specific action. The action has to be enabled to be executed.

IMPORT TYPE

The user can select the import types that should be checked for and attempted during the import process.

SECURITY OVERRIDE SETTINGS

For each of the Import Type selections, the user must also specify which override settings should be allowed. By ticking one of these Override Settings, the user accepts that the system will allow such setting to be overridden as if the user was an administrator. If the setting is not ticked, the document will fail during the import process and be logged appropriately. Otherwise it will be imported regardless.

REVERT CHANGES TO SELECTED EXPORT TYPE

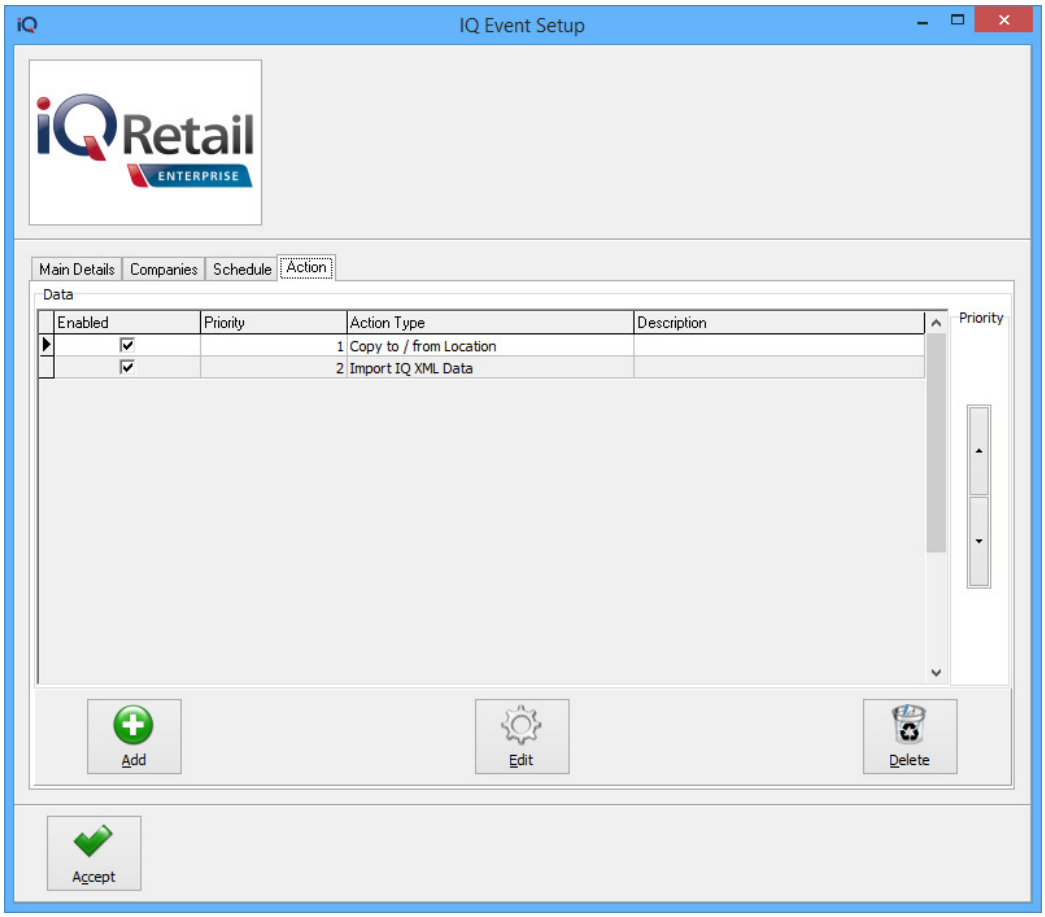
This option allows the user to go back to or return to the former saved information, after changes were made for the specific import type.

ACCEPT

Select the Accept option to save any changes that have been made under the action tab in the event schedule screen.

SCHEDULED EVENT FINALISED

To finalise the scheduled event, ensure that the priority order is correct. This can be done by highlighting the specific action and then using the Priority Bar on the right hand side of the screen in order to set the priorities correctly.



IMPORTANT: When setting up the necessary actions for the scheduled event, make sure that the event actions are in the correct order. The order should be as follows, export the results first, and then the next action should be either to compress the results file or to send the result file out, via email.

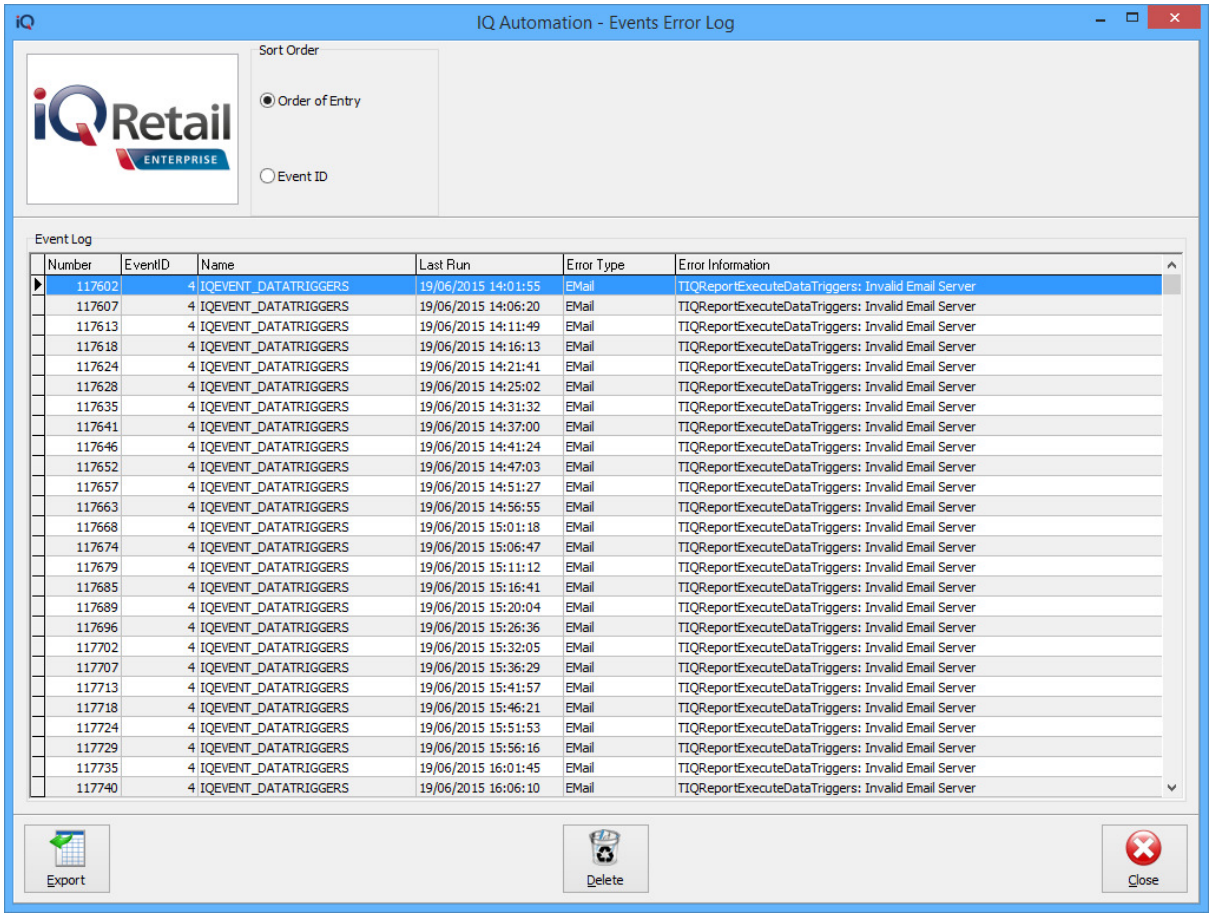
If the priority of the event actions are not correct and first start with email, a blank email will be sent, and thereafter the rest of the actions.

Select the Accept option to finalise the selected scheduled event.

REPORTS

There are three (3) reports the user can choose from. From the IQ Automation main screen → Reports → click then on the type of report the user wants to see.

EVENT LOG



Number	EventID	Name	Last Run	Error Type	Error Information
117602	4	IQEVENT_DATATRIGGERS	19/06/2015 14:01:55	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117607	4	IQEVENT_DATATRIGGERS	19/06/2015 14:06:20	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117613	4	IQEVENT_DATATRIGGERS	19/06/2015 14:11:49	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117618	4	IQEVENT_DATATRIGGERS	19/06/2015 14:16:13	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117624	4	IQEVENT_DATATRIGGERS	19/06/2015 14:21:41	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117628	4	IQEVENT_DATATRIGGERS	19/06/2015 14:25:02	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117635	4	IQEVENT_DATATRIGGERS	19/06/2015 14:31:32	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117641	4	IQEVENT_DATATRIGGERS	19/06/2015 14:37:00	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117646	4	IQEVENT_DATATRIGGERS	19/06/2015 14:41:24	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117652	4	IQEVENT_DATATRIGGERS	19/06/2015 14:47:03	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117657	4	IQEVENT_DATATRIGGERS	19/06/2015 14:51:27	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117663	4	IQEVENT_DATATRIGGERS	19/06/2015 14:56:55	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117668	4	IQEVENT_DATATRIGGERS	19/06/2015 15:01:18	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117674	4	IQEVENT_DATATRIGGERS	19/06/2015 15:06:47	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117679	4	IQEVENT_DATATRIGGERS	19/06/2015 15:11:12	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117685	4	IQEVENT_DATATRIGGERS	19/06/2015 15:16:41	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117689	4	IQEVENT_DATATRIGGERS	19/06/2015 15:20:04	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117696	4	IQEVENT_DATATRIGGERS	19/06/2015 15:26:36	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117702	4	IQEVENT_DATATRIGGERS	19/06/2015 15:32:05	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117707	4	IQEVENT_DATATRIGGERS	19/06/2015 15:36:29	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117713	4	IQEVENT_DATATRIGGERS	19/06/2015 15:41:57	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117718	4	IQEVENT_DATATRIGGERS	19/06/2015 15:46:21	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117724	4	IQEVENT_DATATRIGGERS	19/06/2015 15:51:53	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117729	4	IQEVENT_DATATRIGGERS	19/06/2015 15:56:16	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117735	4	IQEVENT_DATATRIGGERS	19/06/2015 16:01:45	EMail	TIQReportExecuteDataTriggers: Invalid Email Server
117740	4	IQEVENT_DATATRIGGERS	19/06/2015 16:06:10	EMail	TIQReportExecuteDataTriggers: Invalid Email Server

The Event Log contains a list of all the error messages from the last or previous event executions.

BUTTON FUNCTIONALITY

EXPORT

The Export option allows the user to export the Events Error Log in one of the following formats: CSV (comma delimited), TXT, HTML, XML or XLS (Excel).

DELETE

The user can choose if only the selected event or all events within a filter should be deleted.

SELECTED

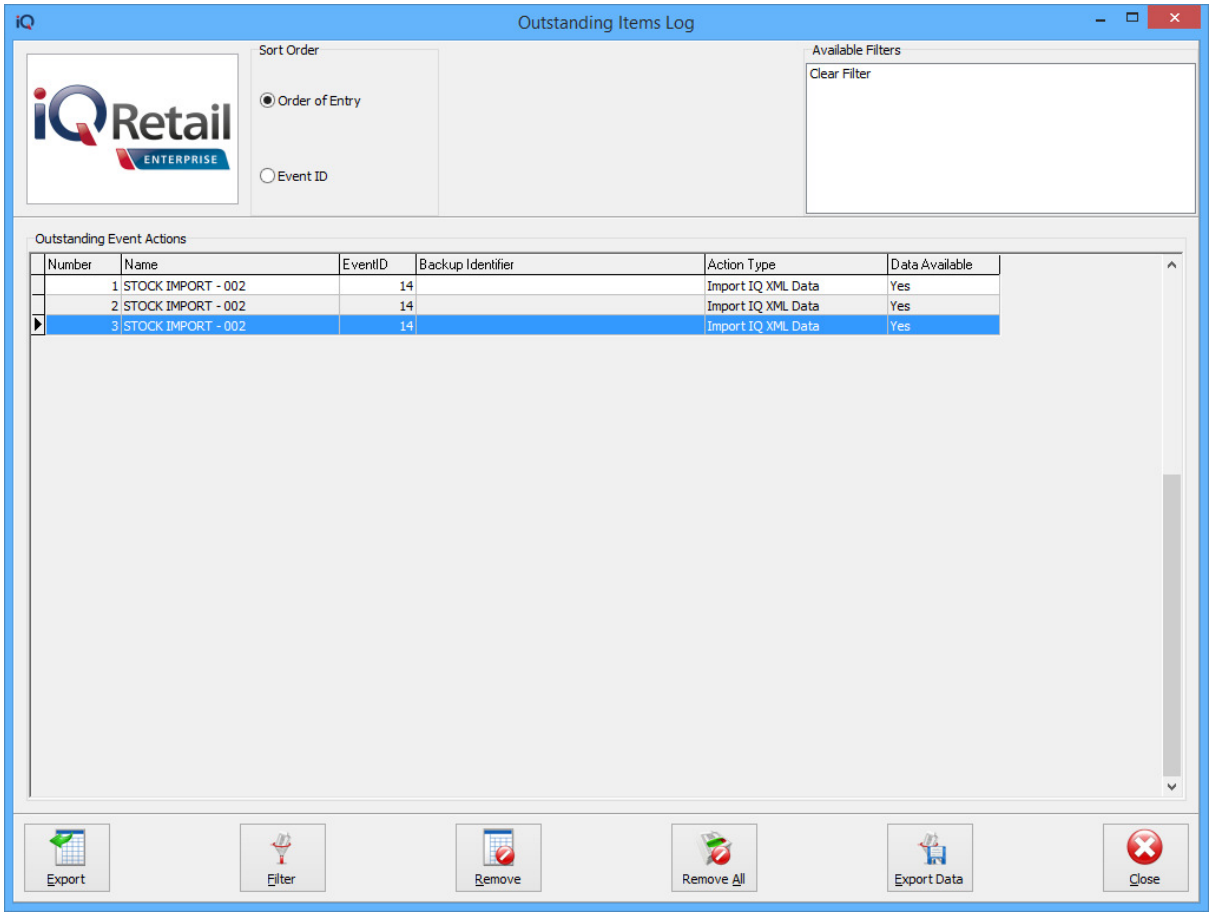
This option allows the user to delete only the selected event.

ALL WITHIN FILTER

CLOSE

The close option allows the user to close the Event Log.

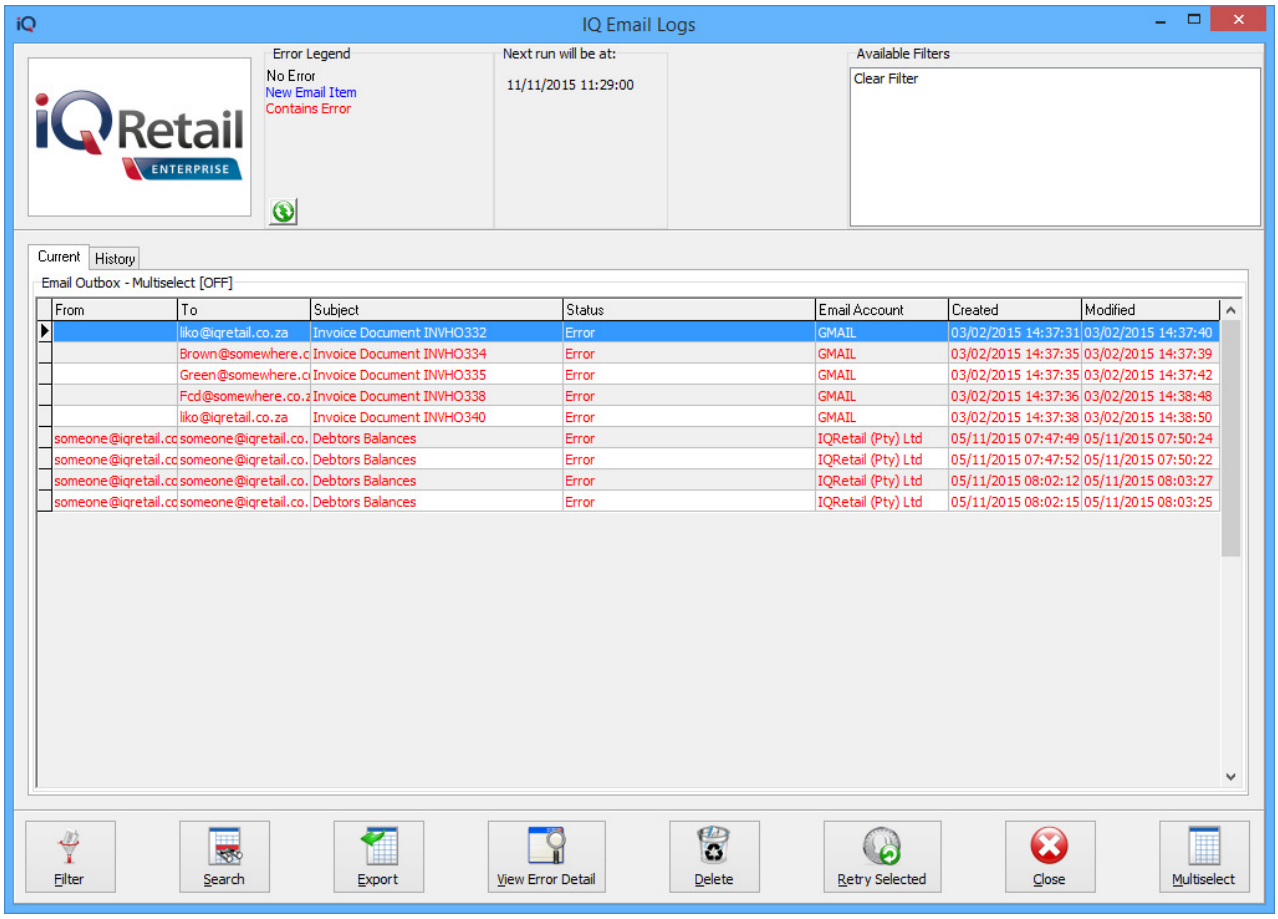
OUTSTANDING ACTIONS LOG



This option enables the user to view Outstanding Action Logs. These log include events and data information on events that have previously failed during Emailing, Uploading or Downloading. If the event previously failed, this log will show it together with the option of exporting the data for preview. The user will be able to remove Outstanding Events to prevent them from executing at the next execution.

EMAIL LOG

The IQ Email Log is a list of all the emails that were sent from IQ Automation.



- End of document -