DiNet Dashboard

User Guide

Data Interchange

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Introduction

The DiNet Integration Network is a global B2B messaging network that lets you exchange business-critical documents with your trading partners across the world. DiNet provides you with a managed integration solution that lets you exchange documents with hundreds of thousands of trading partners.

The DiNet dashboard is designed to give you complete visibility and peace of mind across your entire file exchange process and lets you monitor the progress of files from any device, including via the DiNet iPhone app.

Key features of the DiNet dashboard include:

- **Browser-based User Interface:** Exchange data intuitively, quickly and easily using the enhanced user interface. Monitor the progress of files transmitted from any device with complete visibility of your file exchange process and 24/7 access.
- **Improved Document and File Tracking:** Real-time tracking of documents and files as they are sent and received. Interrogate your system for files sent and received or search for business documents contained within these files.
- **Real-time Alerts and Communications:** Set up automatic email, text message and iPhone push notifications from within the dashboard. Create alerts to receive real-time notification that a file has been sent or received from your trading partners directly to any device. Manage by exception and receive notification of files not transmitted or received from your trading partners.
- **Enhanced Reporting Tools:** Create management reports, including traffic volumes and traffic source by trading partner.

Accessing the DiNet dashboard

To login to your DiNet dashboard account, login at https://web.DiNet.co.uk. Enter your username and password and click on the 'Login' button.

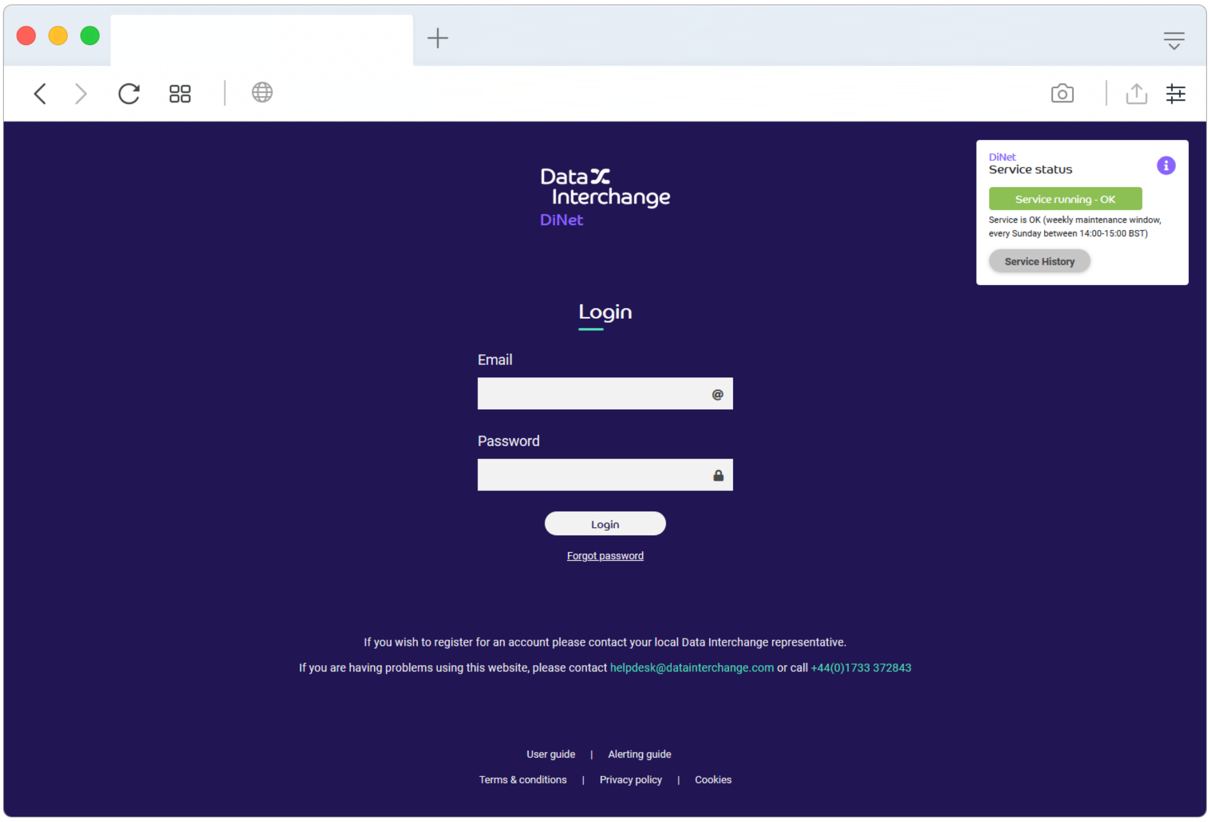

Figure 1: DiNet dashboard login page

- **New users:** If you are a new Dashboard user, you will find these details in the confirmation email from the Data Interchange Administration team.
- **Existing users:** If you are an existing Dashboard user, your login details for the previous version of the Dashboard will be compatible with your new account.

Should you experience an issue logging into your Dashboard account, please contact the Data Interchange Support team for assistance, via one of the following methods:

Telephone: +44 (0) 1733 372843

Email: support@datainterchange.com

Using the Dashboard 'Help features'

The DiNet dashboard has several optional built-in guided tours to help you familiarise yourself with its layout and features.

To access the interactive Dashboard help feature, click 'Help' in the top right-hand side of the navigation menu.

Figure 2 - 'Help features' button

If this is your first time loading the Dashboard, the help feature will pop-up automatically.

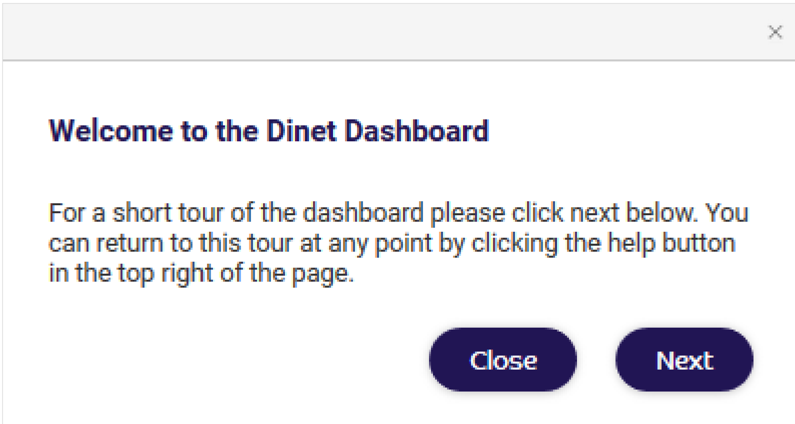

Figure 2: Help guide

Where this is the case and you wish to take the Dashboard tour, click the 'Next' button.

Having started the tour, the help feature will guide you through the Dashboard tabs in-turn, using a series of prompts that demonstrate how each feature works.

DiNet dashboard overview

The DiNet dashboard navigation bar contains six tabs, allowing you to easily navigate the dashboard.

- Home: By clicking on the 'Home' tab you will be able to access the dashboard Homepage. This contains links to common tasks in the dashboard and provides an overview of your account via a number of pre-defined and customisable widgets.
- Files: If you click on the 'Files' tab, you will be able to view and search for files you have sent and received in your DiNet account.
- Documents: The 'Documents' tab filters by document type and allows you to search for business documents contained within the files you have sent and received.
- Reports: Clicking on the 'Reports' tab will allow you to create graphical reports based on your EDI traffic to give you easy visibility of your transactions and highlight trends in the files you have sent and received.
- Alerts: The 'Alerts' tab allows you to configure alerts for the files you are sending and receiving to give you real-time awareness of their status.
- Users: text
- Billing: The 'Account Details & Billing' tab allows you to manage bills and invoices, change account details and create new users & permissions.

Each tab can be accessed by clicking on the respective icon in the navigation bar or from the dashboard homepage, which will be discussed in the next section of this User Guide.

Figure 3: Navigation bar

Homepage

Your DiNet dashboard account comes with a homepage that resizes to fit your screen, enabling you to view data on different devices such as your Android tablet or iPad.

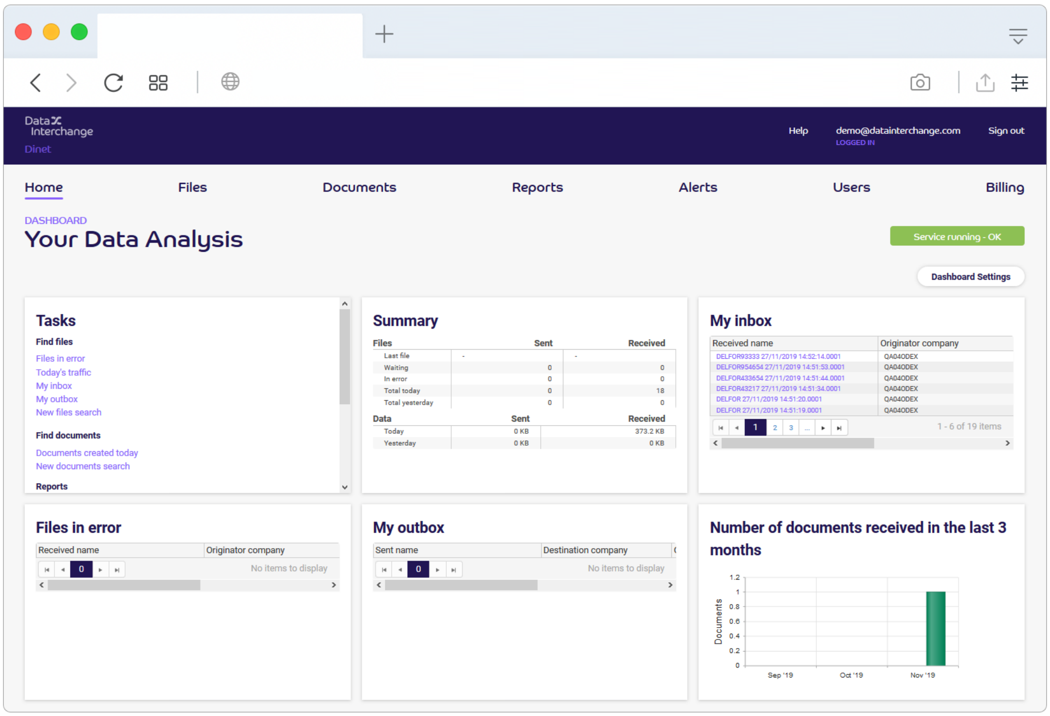

Figure 5 - Dashboard 'default' Homepage

The homepage has been designed to provide you with an up-to-date and easily visible snapshot of your key EDI information. This information is displayed by the following customisable widgets:

- Tasks: This widget provides you with access to the different 'tabs' of the dashboard and provides a quick and easy way to open their specific sub-sections.
- Summary: On this widget, a summary of important file information is displayed including the last file you've sent and received, files waiting or in error and the total number of files you have sent and received in the last 24 hours.
- My Inbox: The Inbox shows the files you have received and indicates their status. Details of each individual file can be viewed in-browser or downloaded to the client machine. To view the file in-browser, click on the box to the left of the file you wish to view and then click on the 'View file content' button. Alternatively, to download it, select the 'Download Files' button above the file view.

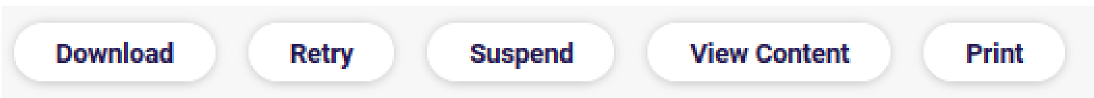

Figure 4: Inbox file options:

The retry button will attempt to resend a file that has previously failed to send to either you, or your trading partner. If a file has failed to send, a red background will appear behind the file text to indicate an error has occurred.

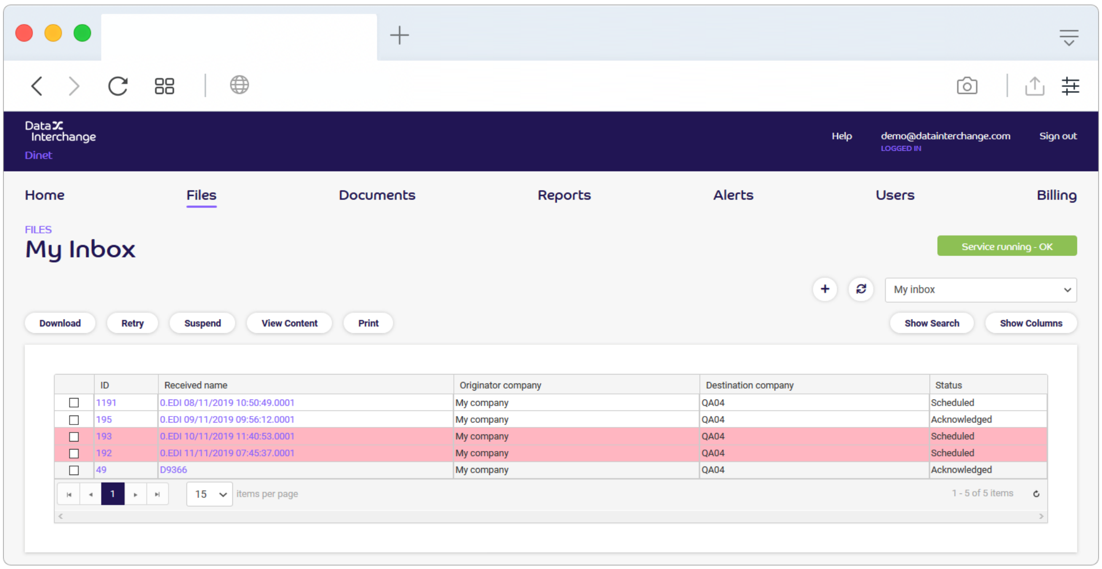

Figure 5: Error files in the Inbox

The Inbox can be filtered by date, file status, (E.g. received or in error) file source and trading partner. The inbox is also searchable using a range of criteria, allowing you to easily locate files in your DiNet account.

- My Outbox: This widget displays the latest files that you have sent to your trading partners and indicates whether they have been received and acknowledged. Like the Inbox, you can both filter and search the view, enabling you to locate files with ease. You can also view the file in-browser, reschedule the file and view the associated communication details.
- Files sent in the last 24 hours: This widget displays the files you have sent in the last 24 hours and indicates their status.
- Files received in the last 24 hours: Similarly, this widget shows all the files that you have received in the last 24 hours and their status.
- Number of documents received in the last 3 months: This widget presents a breakdown of documents both sent and received over the last 3 months.

The Dashboard also allows you to create any number of additional widgets to show specific files, documents, reports and alerts that you wish to be displayed on your Homepage. To create a custom widget however, you will first need to know how to search for a file within the Dashboard and further, create a customized file view, which will the subjects of the next section.

Searching for a file

There are a variety of ways in which you can search for a file in the DiNet dashboard.

1. Navigate to the Dashboard menu bar and click on the 'Files' tab

Figure 6: 'Files' tab in the menu navigation bar

2. Once the default 'Files' tab loads, click on 'Show Search' to load the file search panel. Alternatively, navigate to the homepage and click on 'New file search' in the tasks widget.

Having loaded the panel, you can now fill out the various fields which will specify which file(s) you would like to find. Depending on how specific you would like to make your search, you can select which fields you complete from the following options:

- Select file originator
- Select recipient
- Fill out the entry date and time
- Select the direction of the file(s) which could be sent, received or a combination of both depending on which file(s) you want to locate

3. Click on the 'Show results' button to display the results of your search

There is also the facility to conduct a file search from both your Inbox and Outbox.

Once you have found the file(s) you are looking for, you can save your search criteria as a new user-defined view, enabling you to find files matching the same criteria at a later date.

Creating a new file / document view

To create a new file or document view in the Dashboard, you must first decide on which information you would like to display. For example, you may be interested in displaying documents from a particular trading partner or the total amount of files sent per month.

1. Once you have decided on the content of the view you would like to create, click on the 'Files' tab from the navigation bar

Figure 7: 'Files' tab in the menu navigation bar

2. Once the default file view loads, click on 'Show search' to input the specific information you wish to see.

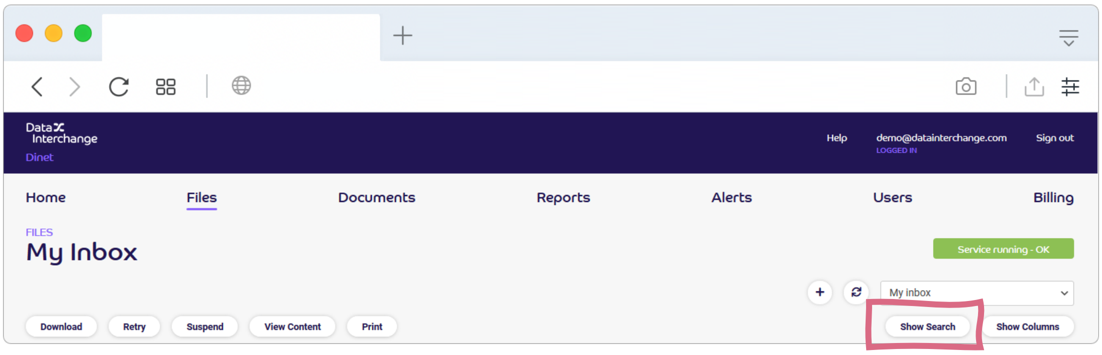

Figure 8: 'Show Search' button

3. You can now fill out the various fields which will determine what files will be shown in your view. Depending on how specific you would like to make your search, you can select which fields to use from the search options available.

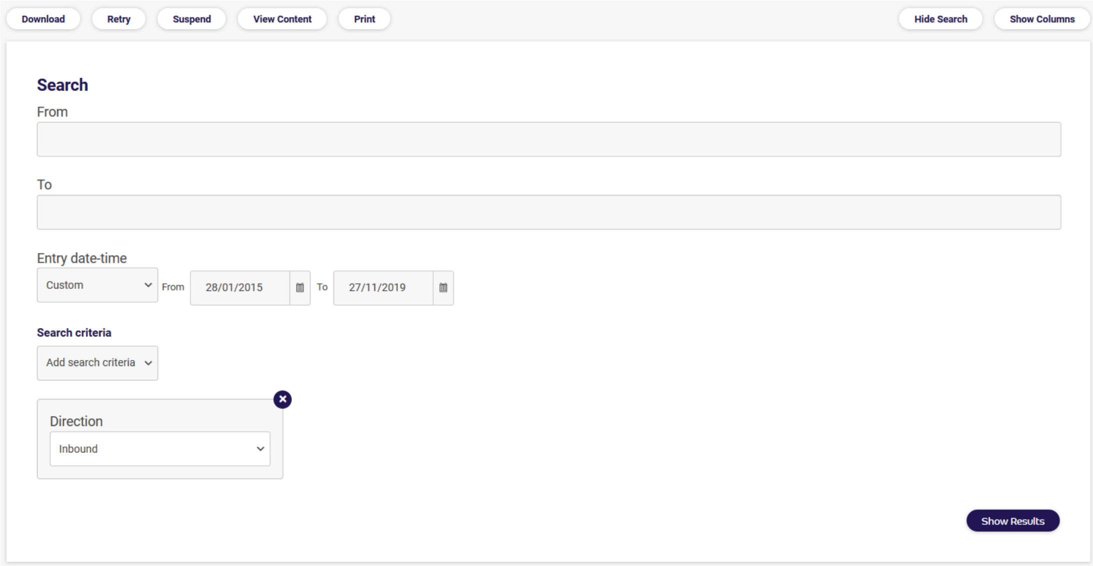

Figure 9: Populating the 'Search' field

4. You can then click on drop down menu entitled 'Add search criteria' to add any additional file information (Error status, filename, ID, Status, System ID)

5. Having chosen your additional search criteria, click on the 'Show results button'. Four default columns will now appear in the new view results including 'Originator company', 'Recipient company', 'Status' and 'Received document type'.

   If you would like to change the order/ number of columns in your view, follow the additional steps below:

   - Click on the 'Show Columns' button
   - From the 'Available Columns', choose the columns you would like to see on the file view and click the 'Add column' button
   - To change the order in which they appear, select them and use the 'Move Up' and 'Move Down' buttons

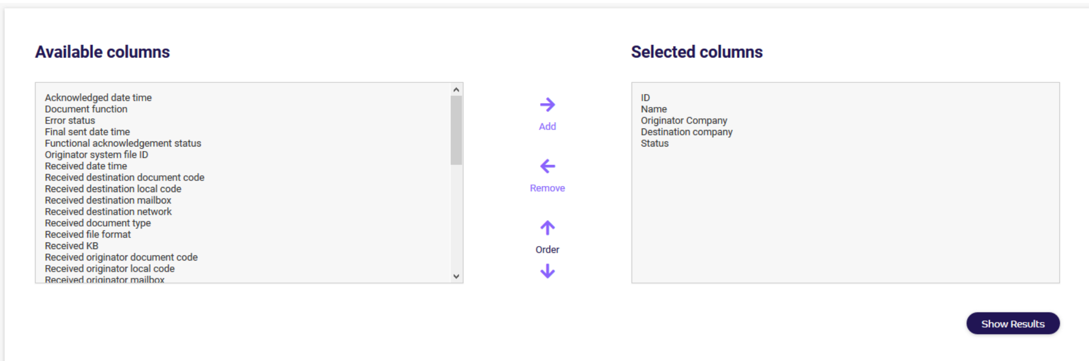

Figure 10: Adding additional columns

   - Click 'Update Columns'

- To save the new view, click on the 'Save as new view' as 'New View' button, adding a name and description of the view when prompted by the pop-up

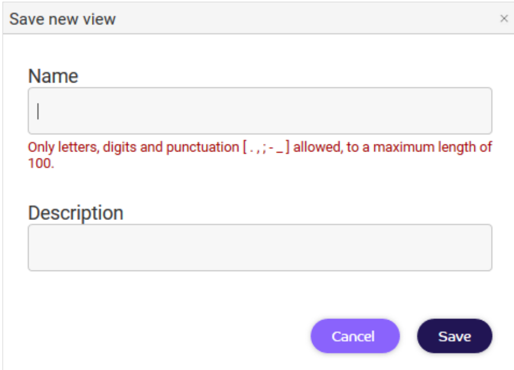

Figure 11: Saving your new view

You have now created a user-defined view to your specifications which can also be accessed as a widget, which we will cover in the next section.

Creating a new Widget

The DiNet dashboard has a series of system pre-defined widgets, which can be found on the homepage to provide a basic snapshot of EDI files, documents and reports.

The Dashboard also allows you to create customised widgets of previously configured user-document or file views.

Note: To make a widget, you must ensure that the view you want to attach to the widget has been configured and saved first.

1. Navigate to the Dashboard homepage and click on the cog icon in the top, right hand-side of the screen

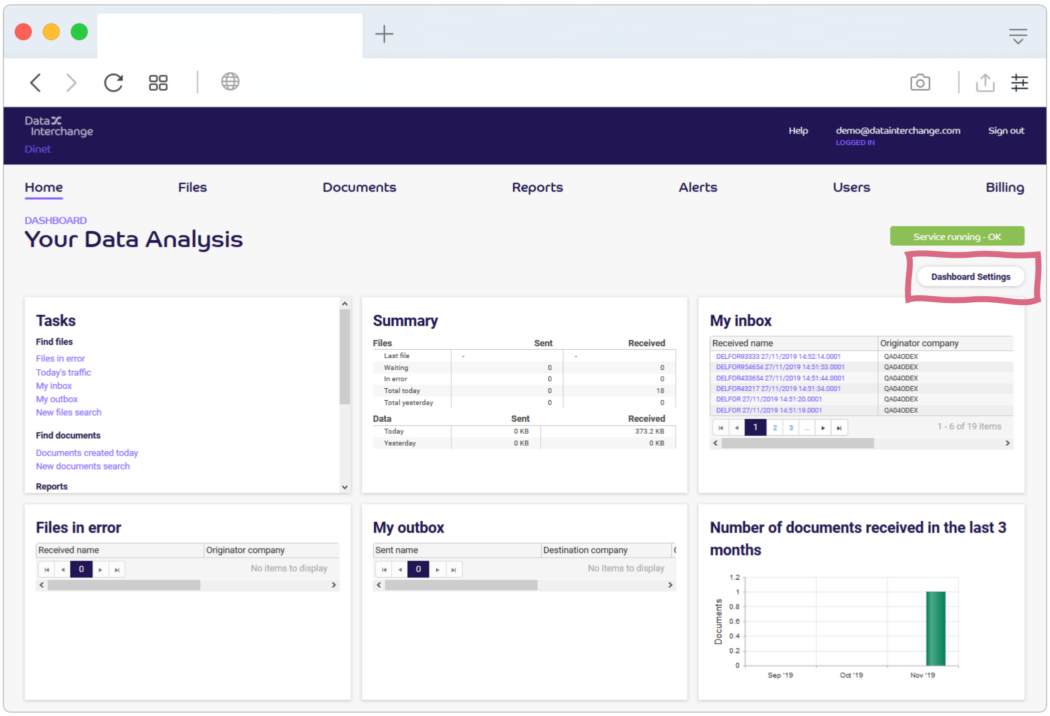

Figure 12: Location of the dashboard settings on the DiNet homepage

2. Select the widget you wish to use from the available widgets list

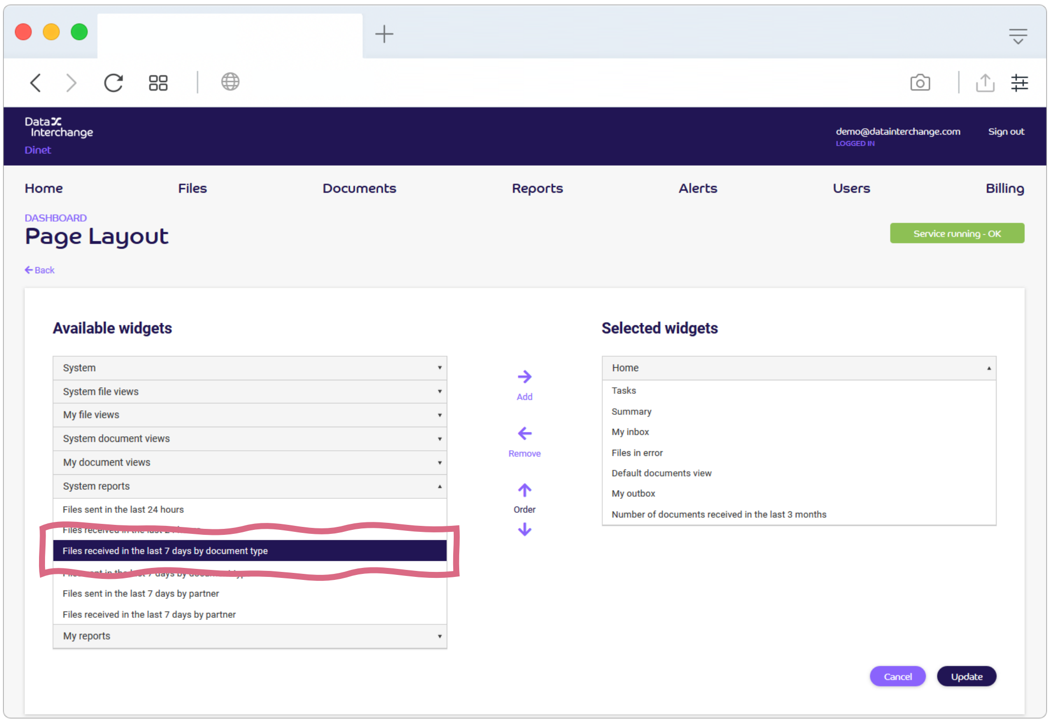

Figure 13: Select available widget(s)

3. Either drag and drop the selected widget into the 'Selected widgets' column or click 'Add widget'
4. Exit the widget setup by navigating to homepage to view the completed widget

Files view

You can access the Files view in the Dashboard in two ways:

Navigate to the homepage, click on the 'Find files' link in the tasks widget and then select 'New files search', or select the 'Files' tab from the menu bar.

Files view

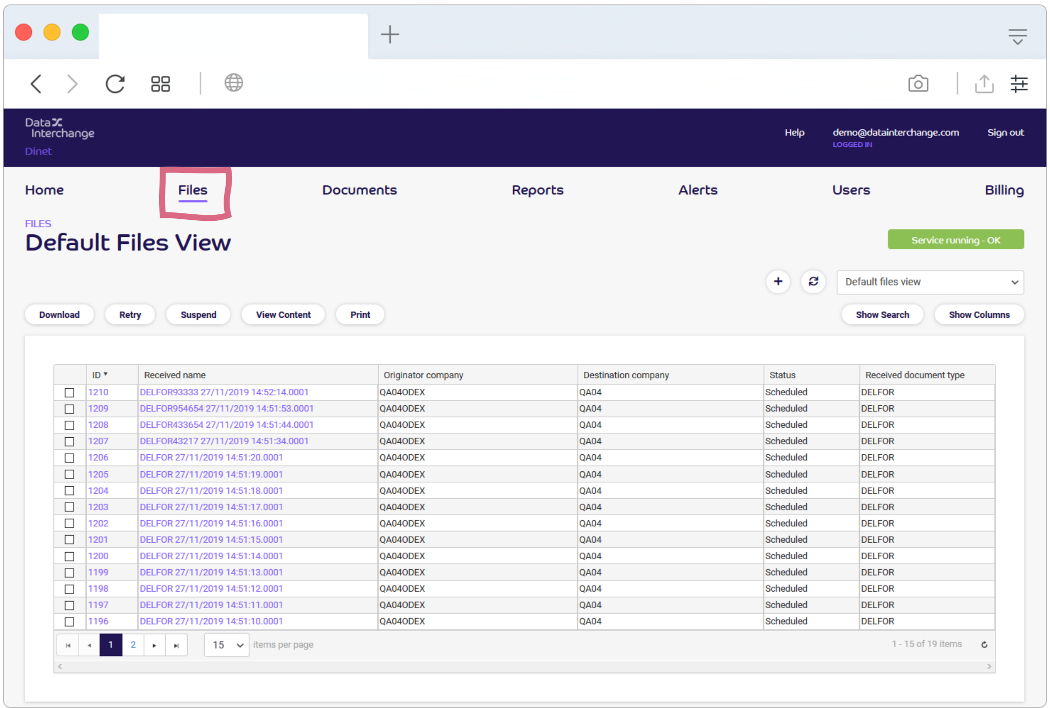

Figure 14: Files view

File details / status

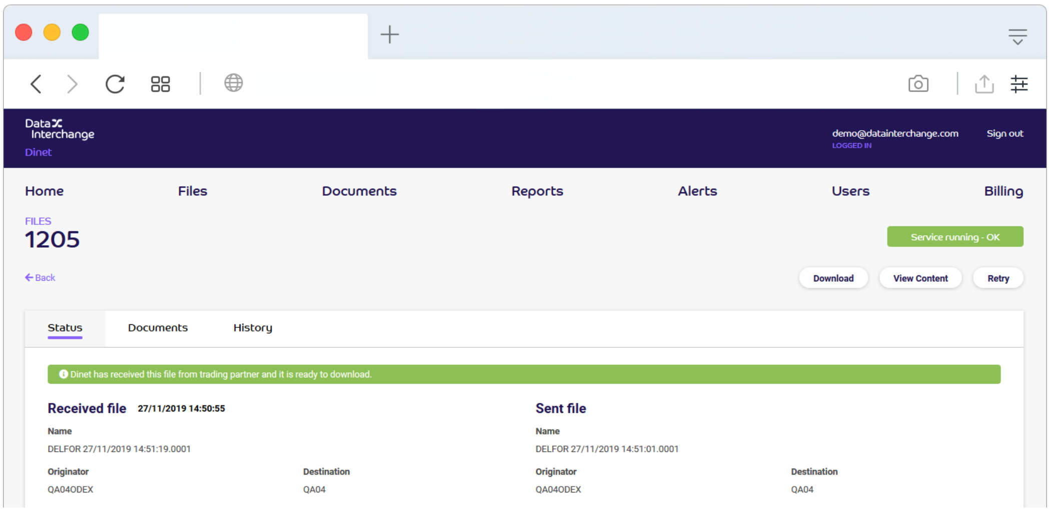

Figure 15: Viewing the status of a file

File details / documents

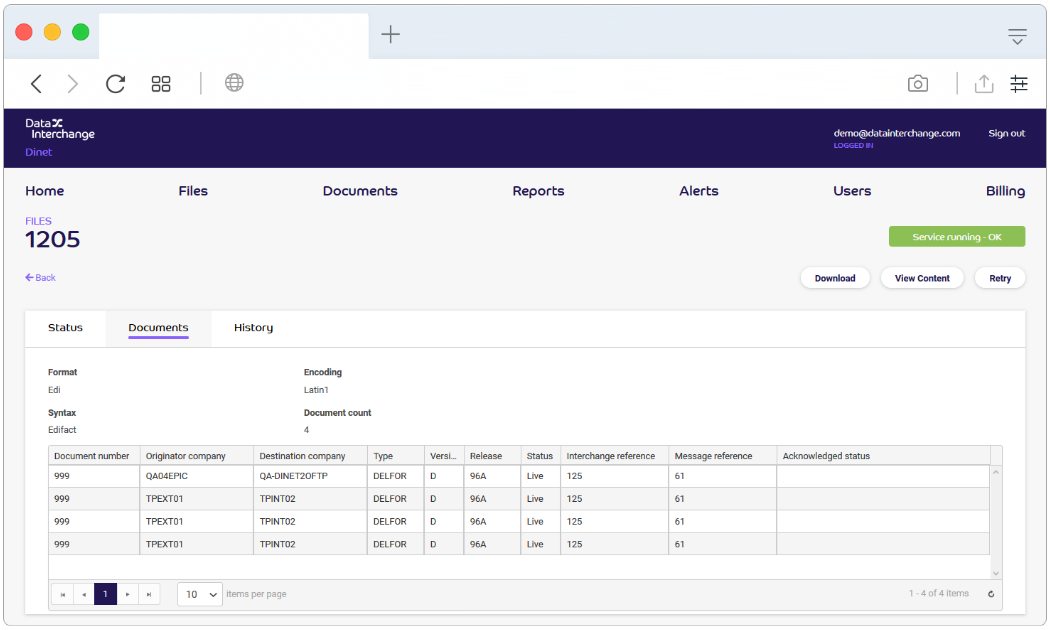

Figure 16: Viewing the documents contained within a file

File details / history

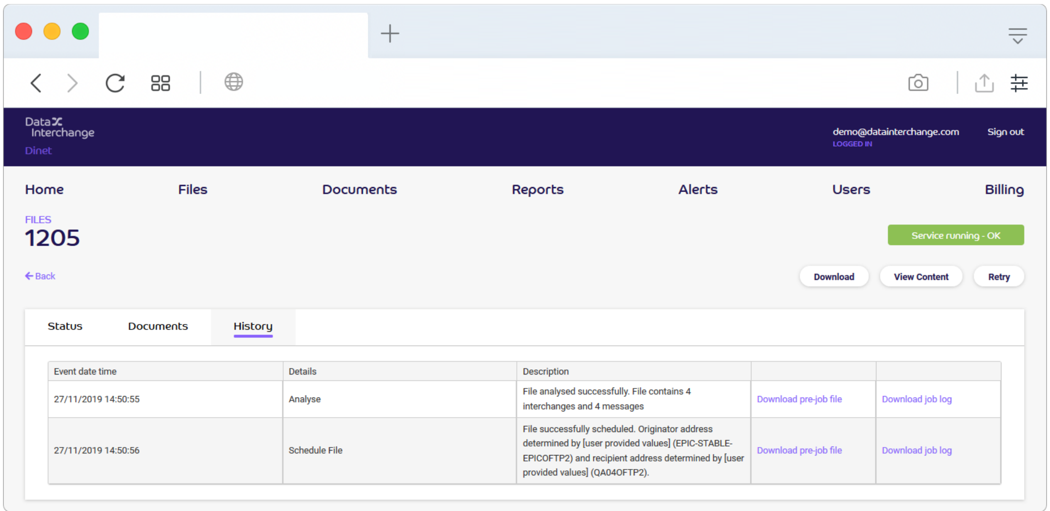

Figure 17: Viewing the history of a file

Documents view

You can access the Documents view in the Dashboard in two ways:

Navigate to the homepage, click on the 'Find documents' link in the tasks widget and then select 'New document search' or select the 'Documents' tab from the menu bar.

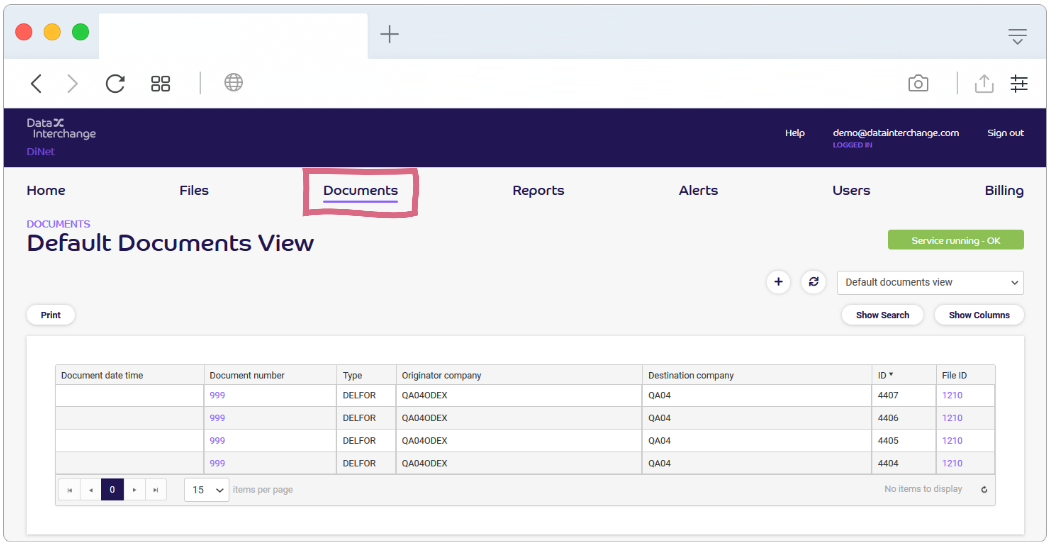

Figure 18: Documents view

Creating a new report

You can access the reports page to create a new report in the Dashboard in two ways:

Navigate to the homepage, click on the 'Reports' link in the tasks widget and then select 'Create new report' or select the 'Reports' tab from the menu bar.

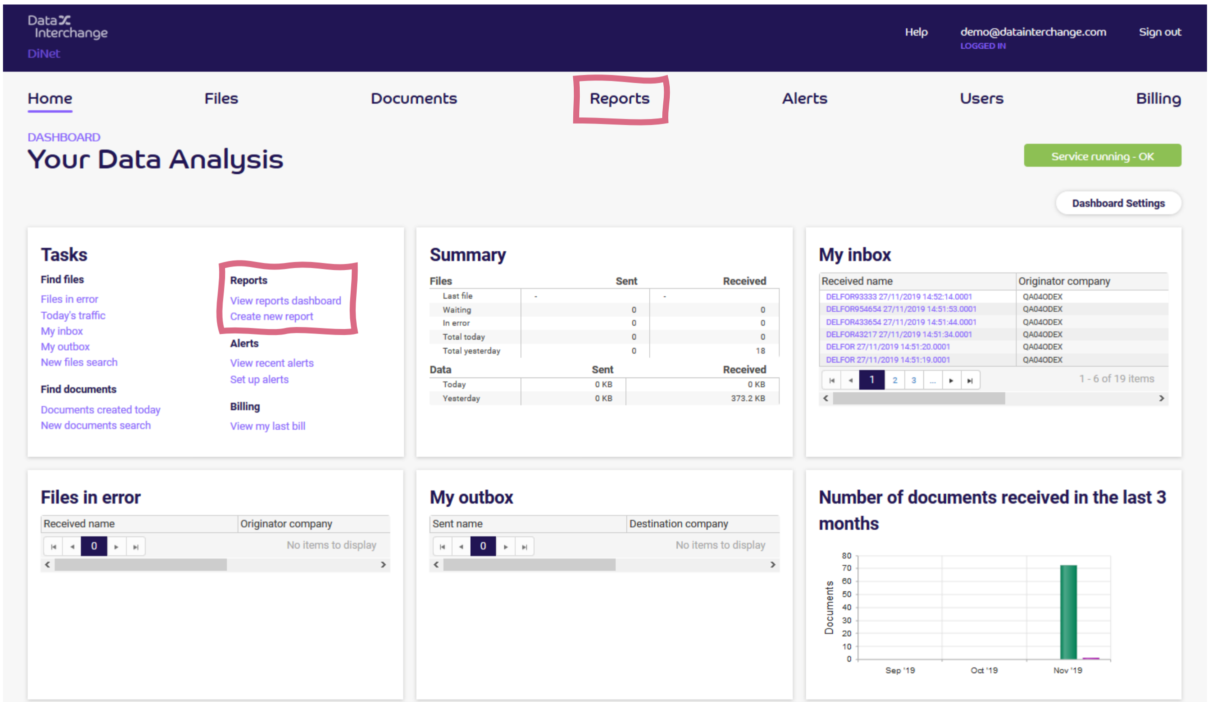

Figure 19: Two ways of accessing the 'Reports' tab from the homepage

1. Fill out the 'Overview' section, populating the name, description and chart type fields

Figure 20: The 'Overview' section

2. In the same way, fill out the 'Report data' section which will define the type of information that the chart will display by choosing from the options in the drop-down

   Note: (There are three different data types to choose from: files, bytes and documents)

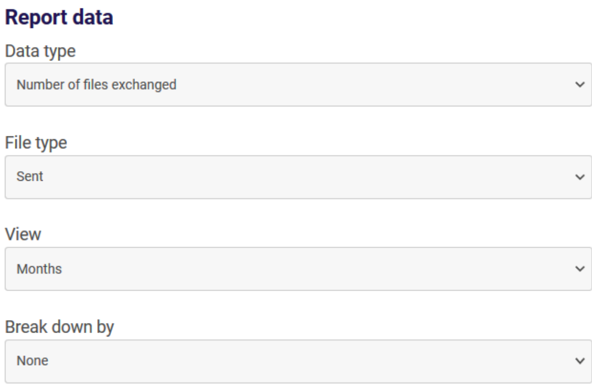

Figure 21: The 'Report Data' section

3. You will then need to decide on the unit of measure (days or months) for your report
4. You then have the option to break down the data into more specific groups (Transmitted date/time, mailbox, document code and document type) which is particularly useful if you are creating a bar-chart

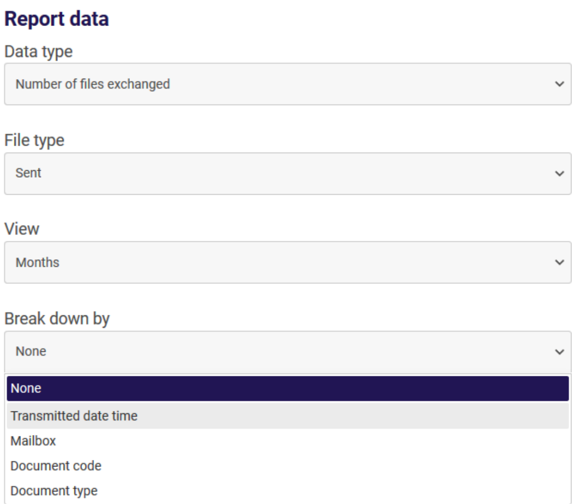

Figure 22: Further data 'Break Down' options

5. You can then use the filter options to specify the time period within which you want to see the data exchanged
6. You can do this by selecting the date and time and choosing if you wish to filter further by document type or trading partners

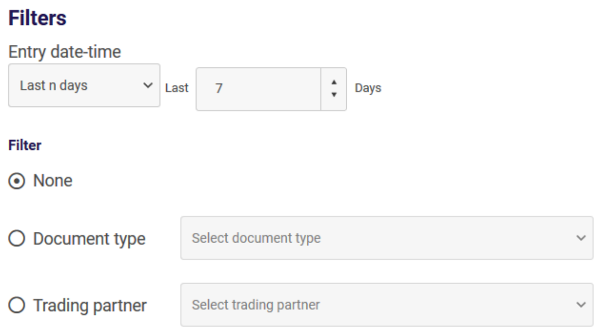

Figure 23: Time period filter options

7. Click on the 'View' button to see the finished report
8. Having seen what the final chart looks like, you can now modify and experiment with the chart types and time periods if you wish
9. Once you are happy with your report, click on the 'Save' button
10. Once saved, the report can be exported, printed or added as a new widget from the homepage

Creating an Alert

You can access the alerts page to create a new alert in the Dashboard in two ways:

Navigate to the homepage, click on the 'Alerts' link in the tasks widget and then select 'Set up alerts' or select the 'Alerts' tab from the menu bar:

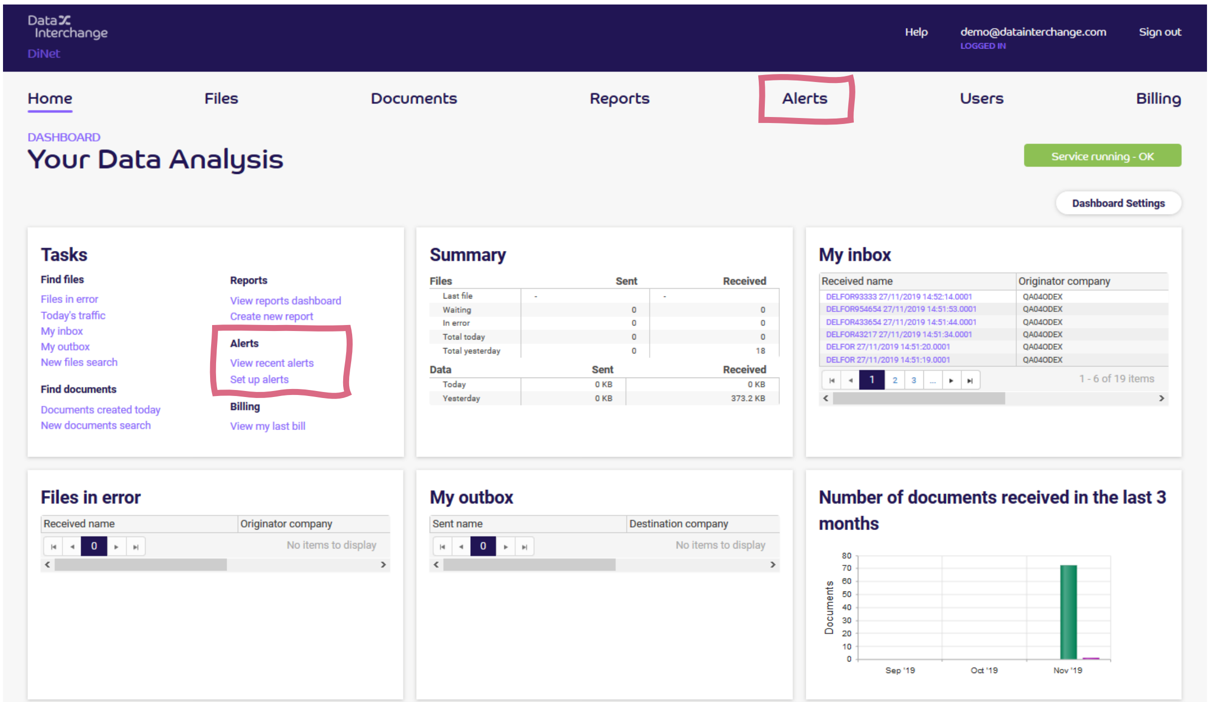

Figure 24: Accessing the 'Alerts' tab

1. Fill out the alert name field
2. Select the most applicable alert type from the alert type drop-down list
3. Specify the message alert you want to send
4. Fill out when the alert is to be raised by deciding on the alert criteria

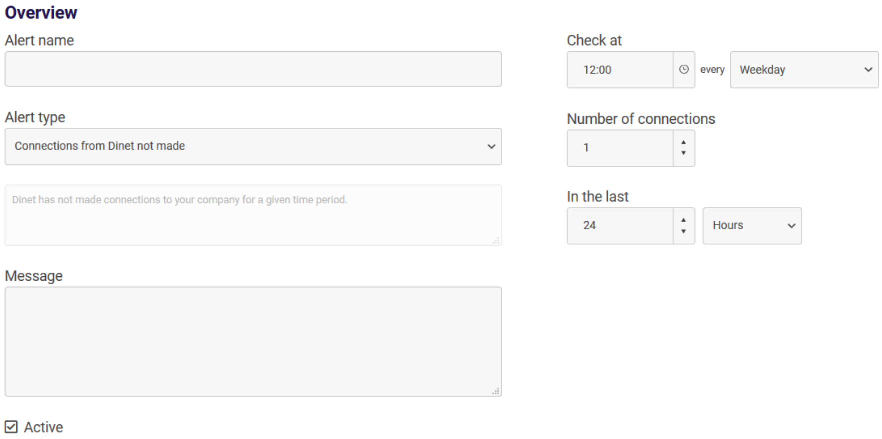

Figure 25: Alert 'Overview' fields

5. Select or add the recipients of the alert by entering their information in the alert table and decide on whether they will receive the alert by SMS or email
6. Click the 'Save' button and the alert will be complete

Users

The DiNet dashboard has several features designed to help you manage your account and allows you to create and edit new users.

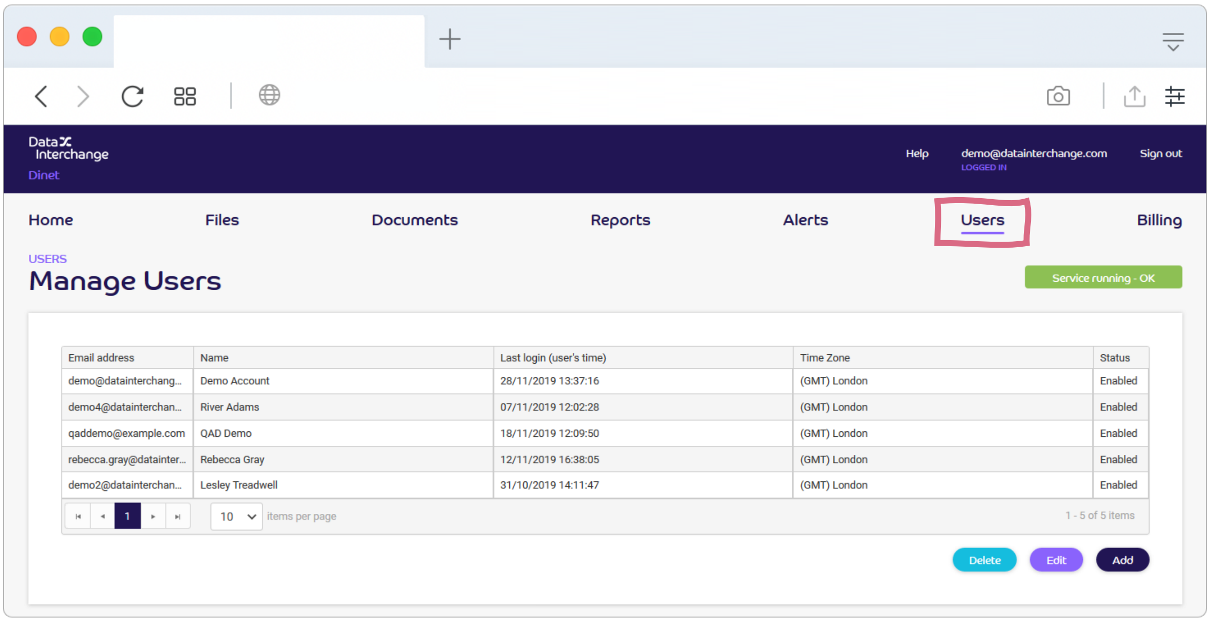

Figure 26: Users tab

To create a new user, you will need to follow the instructions below:

1. Click 'Add'
2. Enter a full name, email address and password and fill out the other optional fields is you wish
3. Click 'Save'

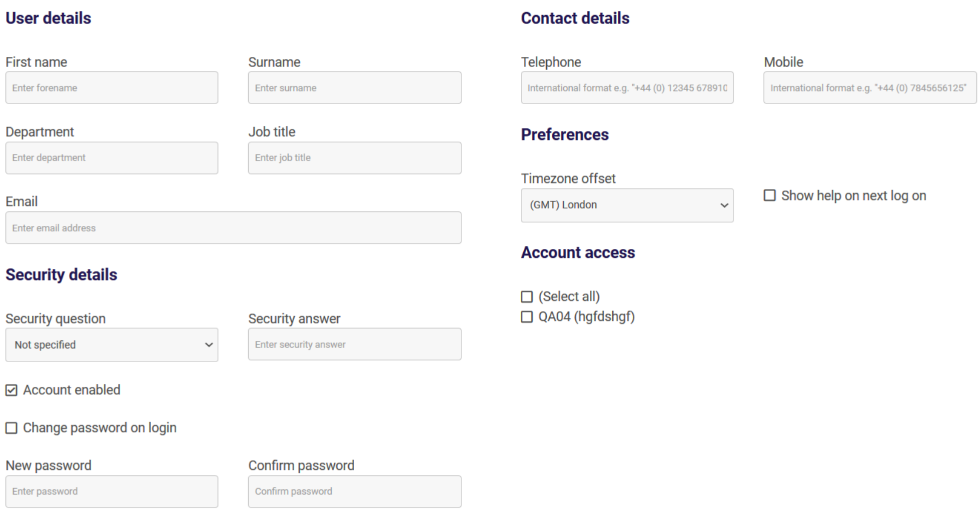

Figure 27: User fields available

To edit or delete a user, you will need to follow the instructions below:

- Highlight the user and click 'Edit' (user details page will be displayed as above)
- To delete a user, highlight the user and click 'Delete'

Billing

In the billing sub-section of the DiNet dashboard, all of your historical DiNet bills can be viewed online or in PDF format. Via this section of the Dashboard, it is also possible to view an itemised breakdown of your DiNet bills.

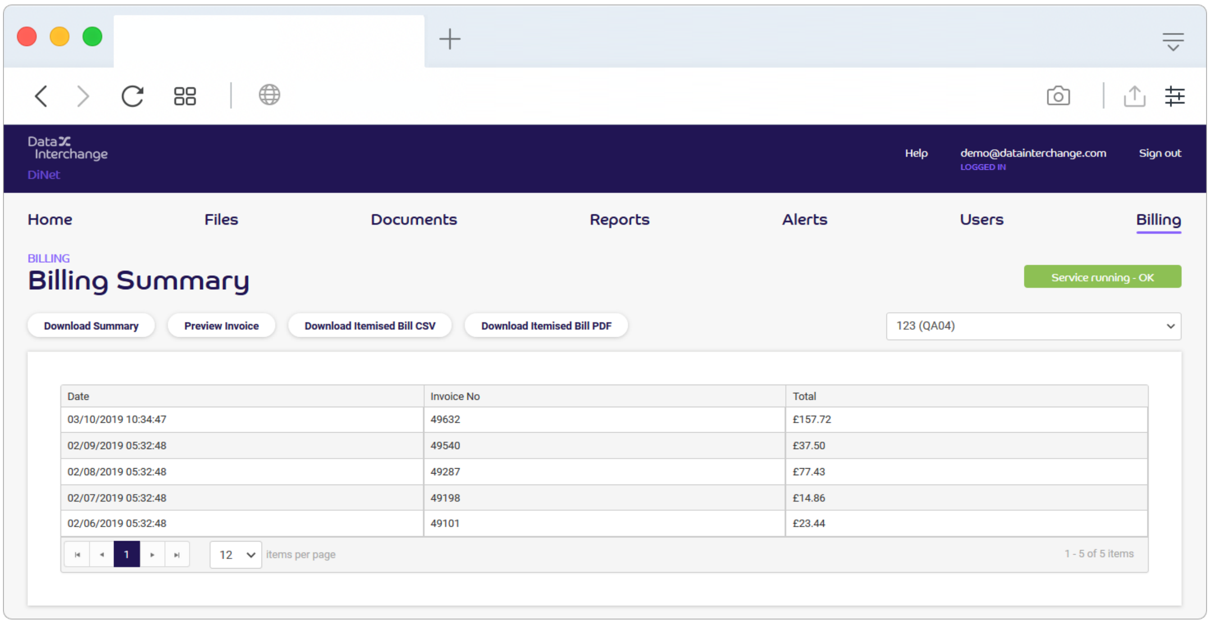

Figure 28: Billing

To download a pdf version of the summary for the invoice, highlight the appropriate invoice in the list and click "Download Summary"

To download a pdf version of the invoice, highlight the appropriate invoice in the list and click 'Preview Invoice'.

To preview either a CSV or PDF formatted version of the itemised bill, highlight the invoice in the list and click 'Download Itemised Bill CSV' or 'Download Itemised Bill PDF'.