

DiNet Dashboard

User Guide

Copyright © Data Interchange Limited.

All rights reserved. No part of this document may be disclosed to third parties or reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written permission of Data Interchange.

Contents

DiNet Dashboard User Guide

User Guide	1
DiNet Dashboard User Guide.....	3
Introduction	5
Accessing the DiNet dashboard	6
Using the Dashboard 'Help features'	7
DiNet dashboard overview.....	8
Homepage.....	9
Searching for a file	11
Creating a new file / document view	12
Creating a new Widget	15
Files view	17
Documents view	19
Creating a new report	20
Creating an Alert	23
Users.....	25
Billing.....	27

DiNet Dashboard

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.

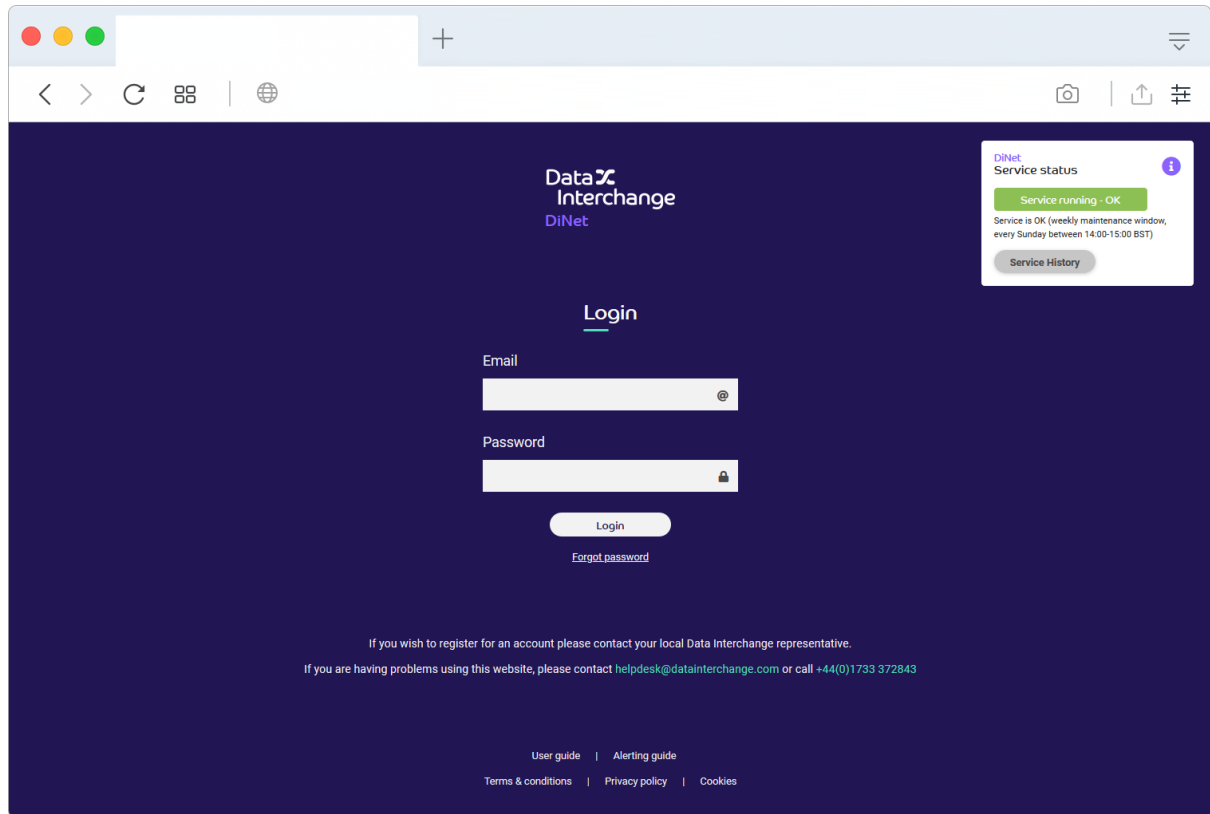


Figure 1: DiNet dashboard login page

- › **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.

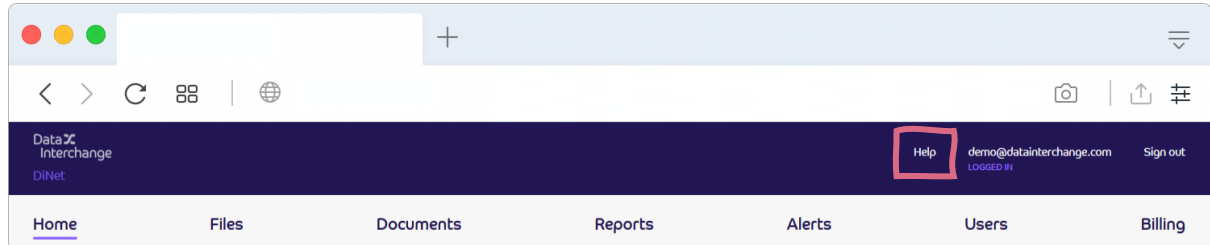


Figure 2 - 'Help features' button

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

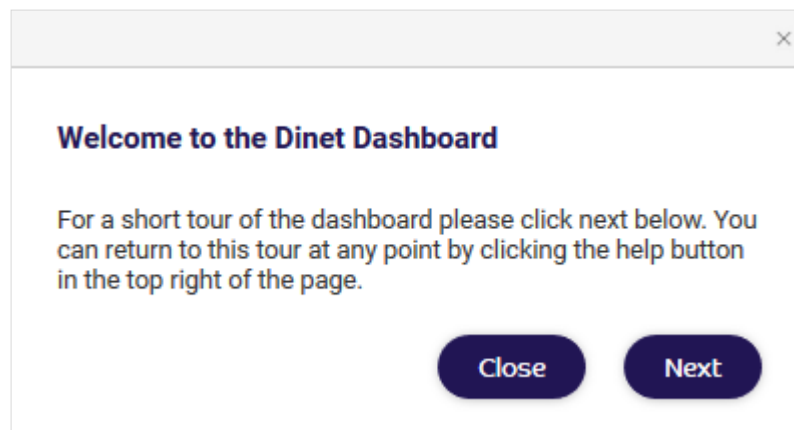


Figure 2: Help guide

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.

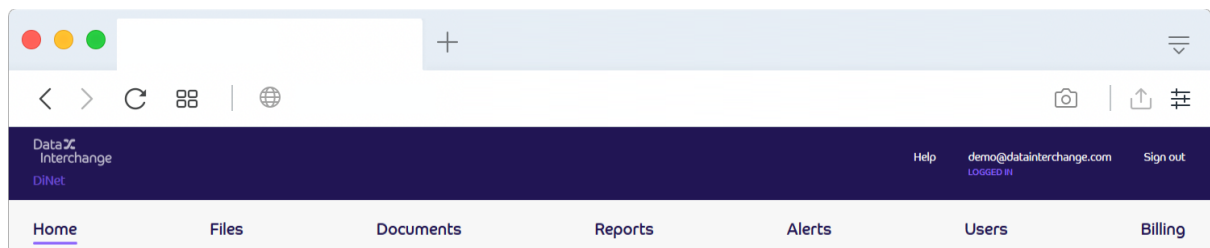


Figure 3: Navigation bar

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.

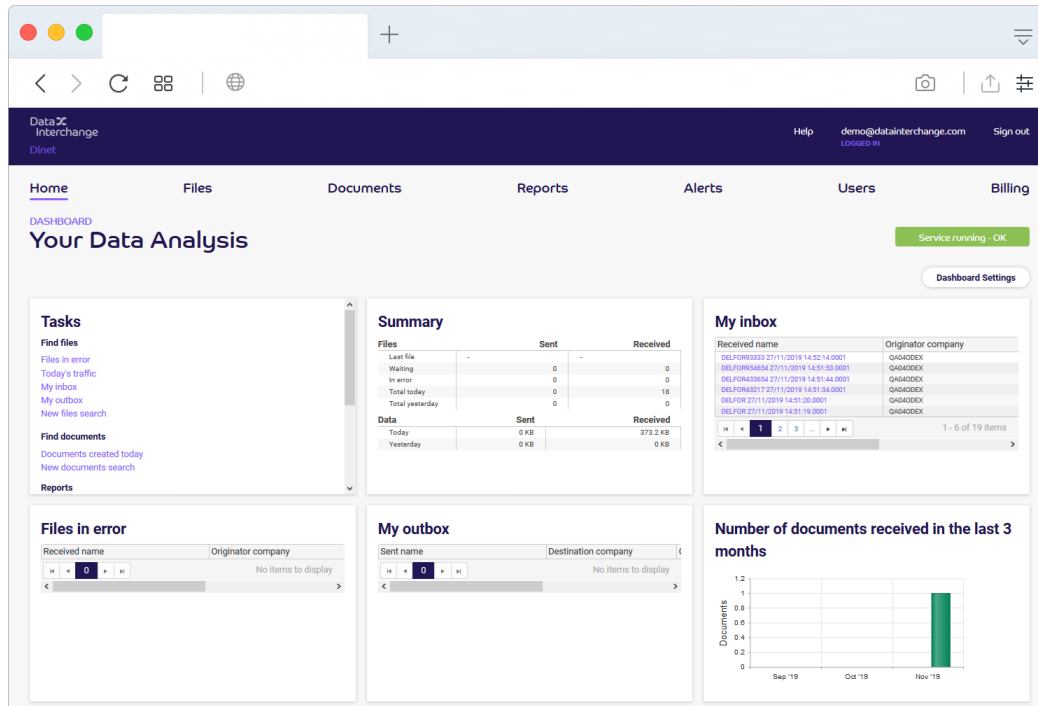


Figure 5 - Dashboard 'default' Homepage

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.

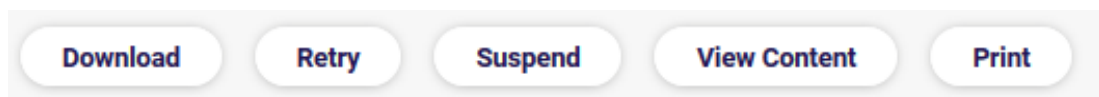


Figure 4: Inbox file options:

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.

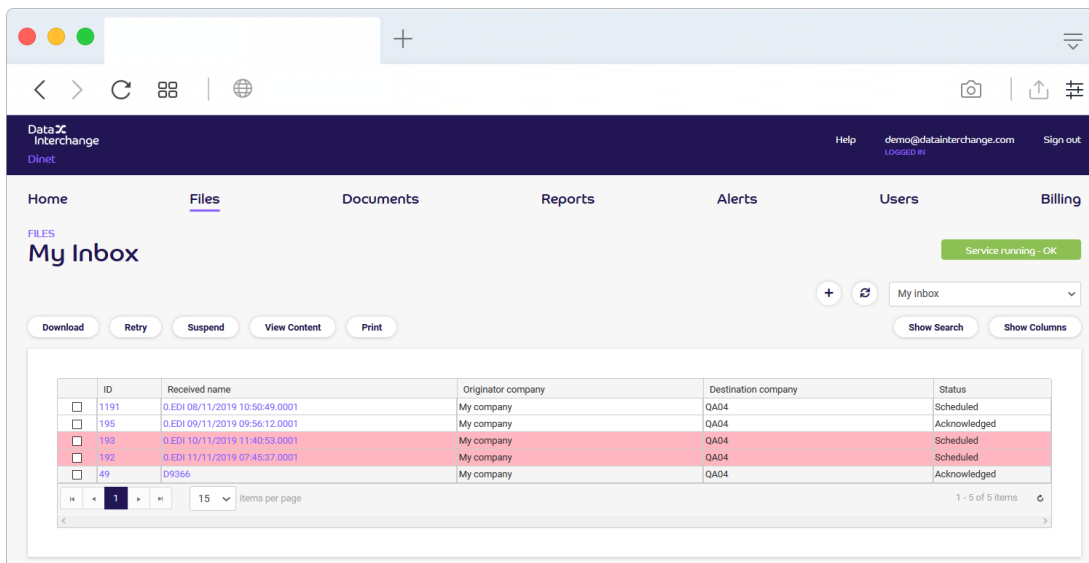


Figure 5: Error files in the Inbox

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 be 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.

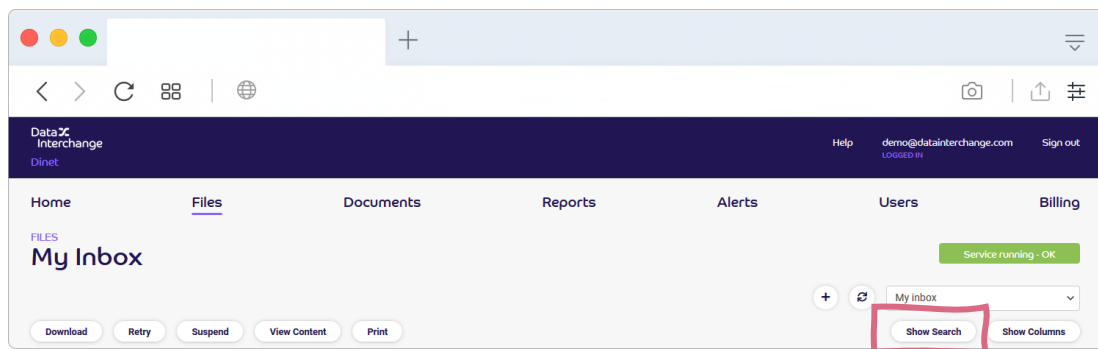


Figure 8: 'Show Search' button

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.

The screenshot shows a search interface with the following elements:

- Buttons at the top: Download, Retry, Suspend, View Content, Print, Hide Search, Show Columns.
- Search** section:
 - From**: A text input field.
 - To**: A text input field.
 - Entry date-time**: A dropdown menu set to 'Custom', with 'From' and 'To' date pickers showing 28/01/2015 and 27/11/2019 respectively.
 - Search criteria**: A dropdown menu set to 'Add search criteria'.
 - Direction**: A dropdown menu set to 'Inbound'.
- Show Results**: A button at the bottom right.

Figure 9: Populating the 'Search' field

- 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)
- 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

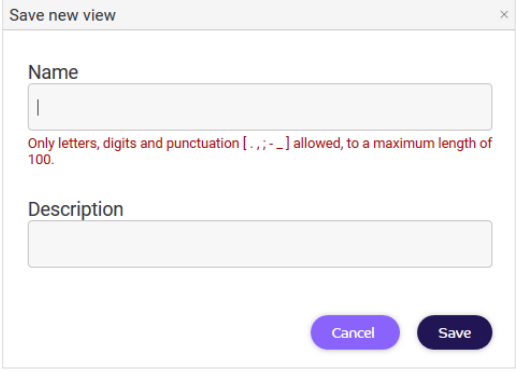
The screenshot shows the 'Available columns' and 'Selected columns' interface with the following details:

- Available columns**: A list of columns including Acknowledged date time, Document function, Error status, Final sent date time, Functional acknowledgement status, Originator system file ID, Received date time, Received destination document code, Received destination local code, Received destination mailbox, Received destination network, Received document type, Received file format, Received KB, Received originator document code, Received originator local code, and Received originator mailbox.
- Selected columns**: A list of columns including ID, Name, Originator Company, Destination company, and Status.
- Buttons**: 'Add' (right arrow), 'Remove' (left arrow), and 'Order' (up/down arrows).
- Show Results**: A button at the bottom right.

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



Save new view

Name

Only letters, digits and punctuation [. , ; - _] allowed, to a maximum length of 100.

Description

Cancel Save

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

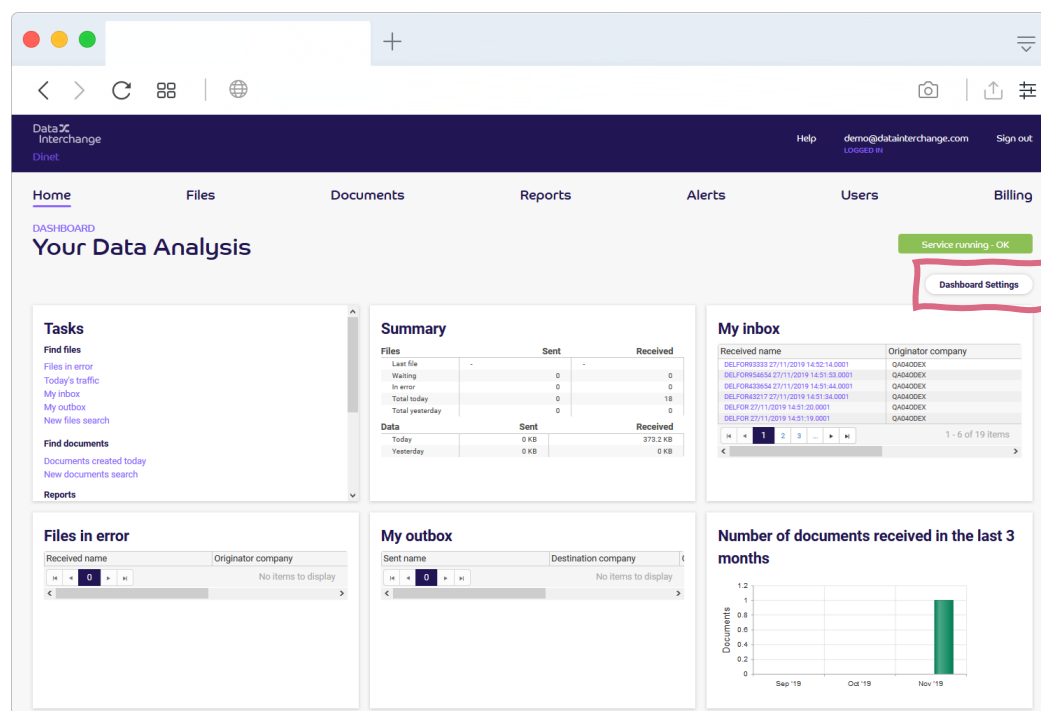


Figure 12: Location of the dashboard settings on the DiNet homepage

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

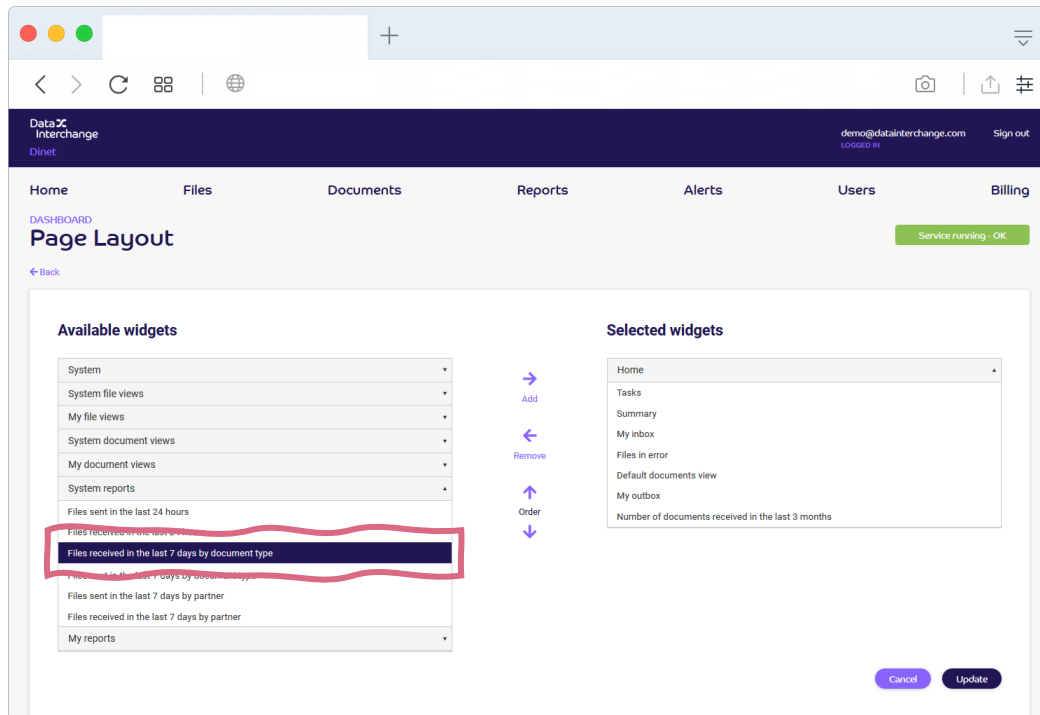


Figure 13: Select available widget(s)

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

The screenshot shows the 'Files' view in the DataX Interchange dashboard. The 'Files' tab is highlighted in the top navigation bar. Below the navigation bar, the page title is 'Default Files View'. A green status bar indicates 'Service running - OK'. Below this, there are buttons for 'Download', 'Retry', 'Suspend', 'View Content', and 'Print'. A search bar with 'Default files view' and a dropdown arrow is also present. The main content area displays a table of files with the following columns: ID, Received name, Originator company, Destination company, Status, and Received document type. The table contains 19 rows of data, all with a status of 'Scheduled'. At the bottom of the table, there is a pagination control showing '1 - 15 of 19 items' and a 'Show Columns' button.

ID	Received name	Originator company	Destination company	Status	Received document type
1210	DELFOR93333 27/11/2019 14:52:14.0001	QA04ODEX	QA04	Scheduled	DELFOR
1209	DELFOR954654 27/11/2019 14:51:53.0001	QA04ODEX	QA04	Scheduled	DELFOR
1208	DELFOR433654 27/11/2019 14:51:44.0001	QA04ODEX	QA04	Scheduled	DELFOR
1207	DELFOR43217 27/11/2019 14:51:34.0001	QA04ODEX	QA04	Scheduled	DELFOR
1206	DELFOR 27/11/2019 14:51:20.0001	QA04ODEX	QA04	Scheduled	DELFOR
1205	DELFOR 27/11/2019 14:51:19.0001	QA04ODEX	QA04	Scheduled	DELFOR
1204	DELFOR 27/11/2019 14:51:18.0001	QA04ODEX	QA04	Scheduled	DELFOR
1203	DELFOR 27/11/2019 14:51:17.0001	QA04ODEX	QA04	Scheduled	DELFOR
1202	DELFOR 27/11/2019 14:51:16.0001	QA04ODEX	QA04	Scheduled	DELFOR
1201	DELFOR 27/11/2019 14:51:15.0001	QA04ODEX	QA04	Scheduled	DELFOR
1200	DELFOR 27/11/2019 14:51:14.0001	QA04ODEX	QA04	Scheduled	DELFOR
1199	DELFOR 27/11/2019 14:51:13.0001	QA04ODEX	QA04	Scheduled	DELFOR
1198	DELFOR 27/11/2019 14:51:12.0001	QA04ODEX	QA04	Scheduled	DELFOR
1197	DELFOR 27/11/2019 14:51:11.0001	QA04ODEX	QA04	Scheduled	DELFOR
1196	DELFOR 27/11/2019 14:51:10.0001	QA04ODEX	QA04	Scheduled	DELFOR

Figure 14: Files view

File details / status

The screenshot shows the 'File details / status' view for file 1205. The 'Files' tab is highlighted in the top navigation bar. Below the navigation bar, the page title is '1205'. A green status bar indicates 'Service running - OK'. Below this, there are buttons for 'Download', 'View Content', and 'Retry'. The main content area displays the file details under the 'Status' tab. A green message bar states: 'Dinet has received this file from trading partner and it is ready to download.' Below this, there are two sections: 'Received file' and 'Sent file'. Each section contains a table with columns for Name, Originator, and Destination.

Received file 27/11/2019 14:50:55			Sent file		
Name	Originator	Destination	Name	Originator	Destination
DELFOR 27/11/2019 14:51:19.0001	QA04ODEX	QA04	DELFOR 27/11/2019 14:51:01.0001	QA04ODEX	QA04

Figure 15: Viewing the status of a file

File details / documents

Data Interchange Dinet | demo@datainterchange.com | Sign out

Home | Files | **Documents** | Reports | Alerts | Users | Billing

FILES 1205 | Service running - OK

Download | View Content | Retry

← Back

Status Documents History

Format: Edi | Encoding: Latin1 | Syntax: Edifact | Document count: 4

Document number	Originator company	Destination company	Type	Vers...	Release	Status	Interchange reference	Message reference	Acknowledged status
999	QA04EPIC	QA-DINET20FTP	DELFOR	D	96A	Live	125	61	
999	TPEXT01	TPINT02	DELFOR	D	96A	Live	125	61	
999	TPEXT01	TPINT02	DELFOR	D	96A	Live	125	61	
999	TPEXT01	TPINT02	DELFOR	D	96A	Live	125	61	

1 - 4 of 4 items

Figure 16: Viewing the documents contained within a file

File details / history

Data Interchange Dinet | demo@datainterchange.com | Sign out

Home | Files | Documents | **Reports** | Alerts | Users | Billing

FILES 1205 | Service running - OK

Download | View Content | Retry

← Back

Status Documents History

Event date time	Details	Description		
27/11/2019 14:50:55	Analyse	File analysed successfully. File contains 4 interchanges and 4 messages	Download pre-job file	Download job log
27/11/2019 14:50:56	Schedule File	File successfully scheduled. Originator address determined by [user provided values] (EPIC-STABLE-EPIC0FTP2) and recipient address determined by [user provided values] (QA040FTP2).	Download pre-job file	Download job log

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.

The screenshot shows the 'Documents' view in the Data Interchange application. The top navigation bar includes links for Home, Files, Documents (highlighted), Reports, Alerts, Users, and Billing. The main content area is titled 'Default Documents View' and features a table with the following data:

Document date time	Document number	Type	Originator company	Destination company	ID *	File ID
	999	DELFOR	QA040DEX	QA04	4407	1210
	999	DELFOR	QA040DEX	QA04	4406	1210
	999	DELFOR	QA040DEX	QA04	4405	1210
	999	DELFOR	QA040DEX	QA04	4404	1210

Below the table, there is a pagination control showing '15' items per page and a 'Print' button. The interface also includes a search bar and a 'Show Search' button.

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.

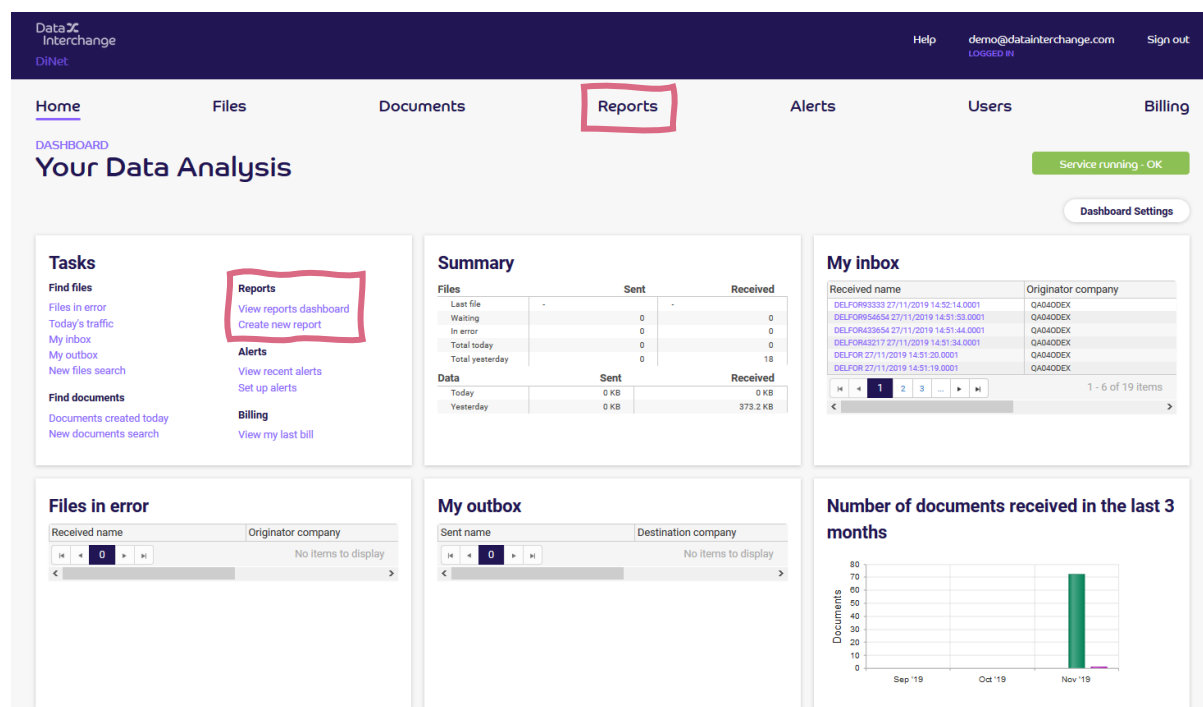


Figure 19: Two ways of accessing the 'Reports' tab from the homepage

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


Overview


Name


Only letters, digits and punctuation [.,;-_] allowed, to a maximum length of 100.

Description

Chart type

☒ 

☐ 

☐ 

☐ 

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)

Report data

Data type
Number of files exchanged

File type
Sent

View
Months

Break down by
None

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

Report data

Data type
Number of files exchanged

File type
Sent

View
Months

Break down by

- None
- Transmitted date time
- Mailbox
- Document code
- Document type

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

Filters

Entry date-time

Last n days ▼ Last 7 Days

Filter

☒ None

☐ Document type

☐ Trading partner

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:

The screenshot shows the Data Interchange Dashboard. The top navigation bar has tabs: Home, Files, Documents, Reports, Alerts (highlighted with a red box), Users, and Billing. The 'Alerts' tab is selected. The main content area is titled 'Your Data Analysis'. On the left, the 'Tasks' widget has a red box around the 'Alerts' link, which includes 'View recent alerts' and 'Set up alerts'. The 'Summary' widget shows a table of files sent and received. The 'My inbox' widget shows a table of received documents. The 'Files in error' widget shows a table of files with errors. The 'My outbox' widget shows a table of sent documents. The 'Number of documents received in the last 3 months' widget shows a bar chart with data for Sep '19, Oct '19, and Nov '19.

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

Overview

Alert name

Check at

 every

Alert type

Number of connections

Dinet has not made connections to your company for a given time period.

In the last

Message

☒ Active

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

25

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

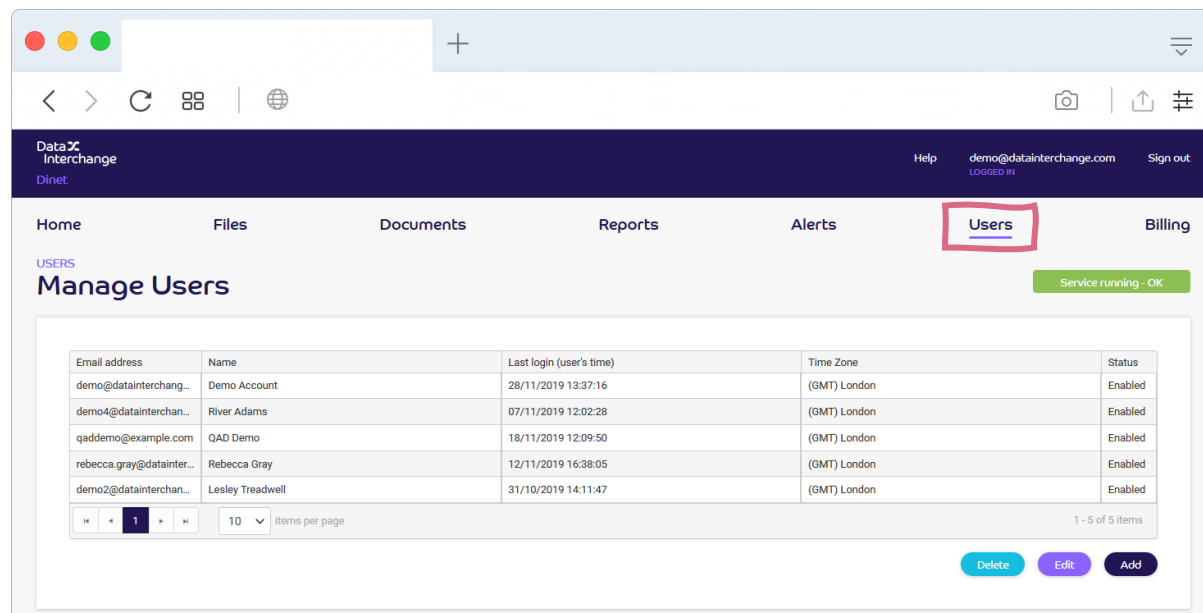


Figure 26: Users tab

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 if you wish
3. Click 'Save'

User details

First name

Surname

Department

Job title

Email

Security details

Security question

Security answer

☒ Account enabled

☐ Change password on login

New password

Confirm password

Contact details

Telephone

Mobile

Preferences

Timezone offset

☐ Show help on next log on

Account access

☐ (Select all)

☐ QA04 (hgfdshgf)

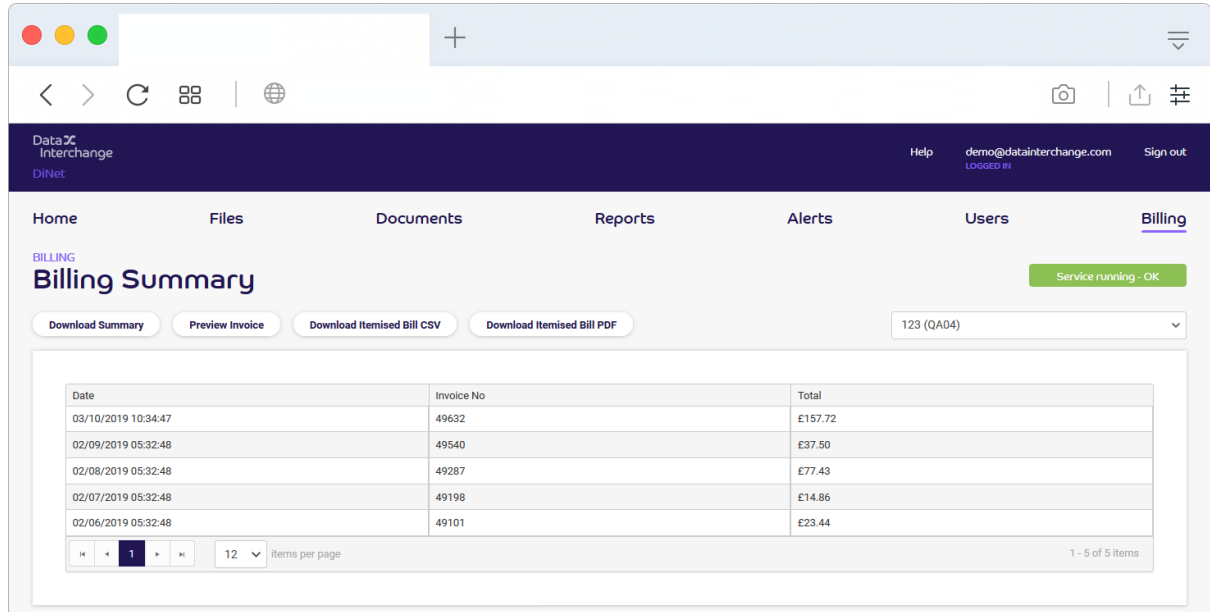
Figure 27: User fields available

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.



Billing Summary

Download Summary Preview Invoice Download Itemised Bill CSV Download Itemised Bill PDF

123 (QA04)

Date	Invoice No	Total
03/10/2019 10:34:47	49632	£157.72
02/09/2019 05:32:48	49540	£37.50
02/08/2019 05:32:48	49287	£77.43
02/07/2019 05:32:48	49198	£14.86
02/06/2019 05:32:48	49101	£23.44

1 - 5 of 5 items

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'.