basware | Documentation

Bizconnect installation instructions

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Contents

Document History

Version	Date	Editor / Reviewer	Revisions
0.5	17/01/2005	EVA	Initial draft document
0.9	15/02/2005	EVA	2nd draft document
1.0	04/04/2005	TDE	Update for Bizconnect CertiONE installer.
1.1	23/02/2005	TDE	Update for ebilling
1.2	29/04/2010	TDE	Review
1.3	01/06/2011	CVA	Support Windows Server 2008 / JRE 1.6
1.4	10/06/2011	GvD	General update
1.5	20/5/2014	TDE	Domain migration + Basware rebranding

1   About Bizconnect

Bizconnect is a standalone communication client to exchange documents with the Basware Commerce Network. The main purpose is to upload files to BaswareONE or download files from BaswareONE over the Internet via HTTPS. This version of Bizconnect has been developed for use with BaswareONE only.

Typical Bizconnect BaswareONE features include:

- the standard up- and download directory structure
- a batch file executing a predefined script
- standard BaswareONE HTTPS connection checks

Files can be easily integrated in your business application, bookkeeping software or ERP system. Doing so, you can link your organization with your clients and suppliers.

Bizconnect connects all trading partners to BaswareONE over HTTPS, allowing for secure and confidential document traffic.

The following document flows are enabled:

- Download:
    - ✓ Bizconnect connects to BaswareONE to check whether there are any new documents/messages available.
    - ✓ If there are any available, Bizconnect will download the documents to a local folder (default: data\in in the Bizconnect installation folder).
    - ✓ If the download was successful, Bizconnect will update the status on BaswareONE.
    - ✓ If the download was unsuccessful, Bizconnect will retry to download the document in the next run.

- Upload:
    - ✓ Bizconnect checks whether there are any new documents/messages available in a local folder (default data\out*.mrt in the Bizconnect installation folder) for upload.
    - ✓ If there are any available, Bizconnect will upload the documents to BaswareONE
    - ✓ If the upload was successful, Bizconnect will move the local file to another folder (default data\out\done in the Bizconnect installation folder).
    - ✓ If the upload was unsuccessful, Bizconnect will move the file to an error folder.

- Error Notification:
  Bizconnect can be configured to send e-mail notifications or to store log information:
    - ✓ Bizconnect will send an e-mail when an error occurred in the Bizconnect script
    - ✓ Logging info can be put default into ./logging/notify.log

- Scheduling the upload & download:
  Bizconnect also contains a scheduler to execute the scripts. You can use the Bizconnect scheduler or you can schedule the scripts (batch-files) with your own scheduler.

2   Installation Requirements

Below are the minimal installation requirements for installing Bizconnect:

- Supported Platforms
  - ✓ Microsoft Windows 2000
  - ✓ Microsoft Windows XP
  - ✓ Microsoft Windows 2003
  - ✓ Microsoft Windows Server 2008 R2

- Minimum hardware requirements
  - ✓ Pentium processor
  - ✓ 64Mb of RAM minimum
  - ✓ 75MB free disk space minimum

- Connectivity requirements
  - ✓ Internet Connection
  - ✓ Connectivity over HTTPS to https://www.baswareone.com should be available. This means that port 443 on the firewall must be open.

- Human Skills requirements for installation of Bizconnect
  - ✓ IT Skills
  - ✓ Familiarity with Windows Operating System (e.g. Windows Services start/stop)
  - ✓ Familiarity with Network configuration (e.g. firewalls, proxy servers, ...)

3 Bizconnect Installation

In order to install, configure and run Bizconnect, you can follow the steps in the order as they are described in this document.

3.1 Bizconnect Standard Installation

<u>What?</u> The first step is to install the Bizconnect software package.

<u>How?</u>
- Open your browser and go to https://www.baswareone.com/bcclient
- Download 'install.exe'
- Download this documentation
- Read this documentation carefully
- Execute the 'install.exe'.
- Follow the instructions of the Installer.
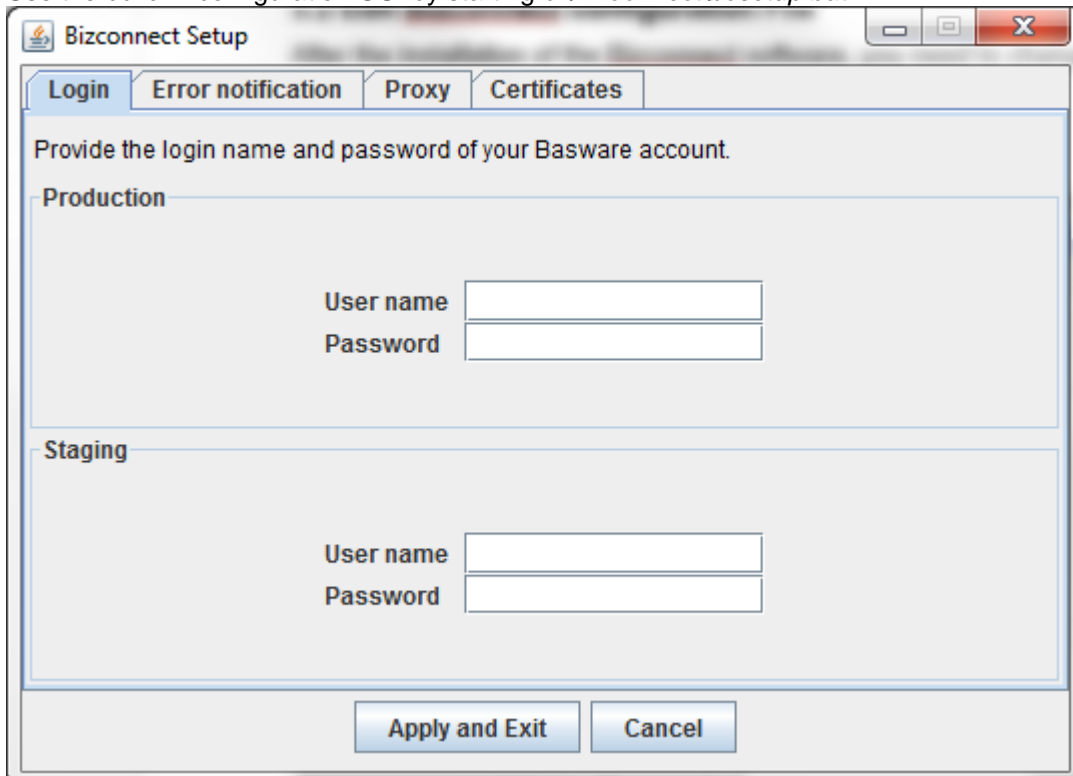
> *Note: The installer proposes C:\Bizconnect as the default installation folder. Further in this document this has been assumed to be the Bizconnect installation folder.*

3.2 Edit Bizconnect configuration File

After the installation of the Bizconnect software, you need to change some configuration settings in order to run the scripts correctly.

3.2.1 Basic

Use the build in configuration GUI by starting *c:\Bizconnect\bcsetup.bat*

Bizconnect Setup

| Login | Error notification | Proxy | Certificates |

Provide the login name and password of your Basware account.

Production

User name
Password

Staging

User name
Password

Apply and Exit   Cancel

3.2.2 Advanced

Use a standard XML or Text Editor (e.g. Notepad, no MS Word if possible) to edit the file
bc_parameters_production.xml that can be found in the scripts folder in the Bizconnect installation folder.

Look for the following lines in the bc_parameters_production.xml file to change the default settings with your personal settings:

Look For	Description	Example
`<user>USER</user>`	Change USER into the username that you have received	`<user>MYUSERNAME</user>`
`<pwd>PASSWORD</pwd>`	Change PASSWORD into the password that you have received	`<pwd>MYPWD</pwd>`
`<proxy><host></host></proxy>`	If you are using a proxy server, specify the proxy's DNS or IP address, otherwise leave unchanged	`<host>proxy.domain.com</host>`
`<proxy><port></port></proxy>`	If you are using a proxy server, specify the proxy's port number, otherwise leave unchanged	`<port>123</port>`
`<proxy><user></user></proxy>`	If you are using a proxy server that requires basic authentication, specify the user name, otherwise leave unchanged	`<user>proxyuser</user>`
`<proxy><pwd></pwd></proxy>`	If you are using a proxy server that requires basic authentication, specify the password, otherwise leave unchanged	`<pwd>proxypwd</pwd>`

`<errorhandling>`
`<notification type="mail"`
`enabled="true">`
`    <server>MAILSERVER</server>`
`</notification>`
`</errorhandling>`
	If you want to use e-mail notification, specify the DNS or IP of your mailserver,
	Remark: enabled="true"
	If you don't need email, then enabled="false" !
		`<server>mail.domain.com</server>`
		or
		`<server></server>`
		Default: enabled="false"

`<errorhandling>`
`<notification type="mail"`
`enabled="true">`
`<from>FROM@MYDOMAIN.COM</from>`
`</notification>`
`</errorhandling>`
	If you want to use e-mail notification, specify the sender, otherwise make empty	`<from>bizconnect@domain.com</from>`
		or
		`<from></from>`

`<errorhandling>`
`<notification type="mail"`
`enabled="true">`
`<to>TO@MYDOMAIN.COM</to>`
`</notification>`
`</errorhandling>`
	If you want to use e-mail notification, specify the recipient, otherwise make empty.
	Note: muliple recipients can be specified using
		`<to>helpdesk@domain.com</to>`
		or
		`<to></to>`

	semi-colons as separator (;)	

`<errorhandling>`
`<notification type="file"`
`enabled="true">`
`    <file>./logging/notify.log</file>`
`</notification>`
`</errorhandling>`
	If you want to use filelogging specify the filename, Remark: enabled="true"
	If you don't need filelogging, then enabled="false" !
		`<server>mail.domain.com</server>`
		or
		`<server></server>`
		Default: enabled="false"

The `<downloadjcfile>` section contains your file download settings:

`<downloadjcfile>`	Define how to download messages
`        <unzipdir>data/tmp</unzipdir>`	A zipfile will be downloaded always and unzipped into dir

`        <types message="%MESSAGE%"`
`        type="%DATATYPE%">`
`                    ...`
`        </types>`
	Copy as many `<types>` blocks within the `<downloadjcfile>` element as you need.

`</downloadjcfile>`	

In each `<types>` element block you specify:

`<types message="%MESSAGE%" type="%DATATYPE%">`	`%MESSAGE%={default,ORDERS,`
	`ORDCAN,FEEDBACK,...}`
	`%DATATYPE%={mrt,edi,pdf,obj}`

`    <action>copy</action>`	copy (default) : create new file append : if you want to append to a single file each time this message type is downloaded
`    <filepath>data/in/mrt/%auditno%.mrt</filepath>`	Location directory (make sure this directory exists!!) + filename Some keywords can be used in both filename & directory. Most important keywords: `%auditno%`: unique audit reference number `%sender%` : sender name as known at Basware side `%receiver%`: receiver name as known at Basware side
`</types>`	

The `<post>` section contains your file upload settings for each message type:

`<post>`	Define messages to post

`        <message>`
`        ...`
`        </message>`
	Within the `<post>` element you can copy as many `<message>` blocks as you need.

`</post>`	

In each `<message>` element block you specify:

`<message [smime="%SMIME%"]>`	Within the `<post>` element you can copy as many `<message>` blocks as you need.

		The optional `smime` attribute can be 'none', 'signed', 'encrypted' or 'signed_and_encrypted' (when not 'none', certificate properties are also needed!)
`<locallocation>./data/out</locallocation>`		Location directory (make sure this directory exists!!)
`<localmask>*.mrt</localmask>`		
`<contenttype>application/mrt</contenttype>`		`application/mrt` `application/xml` `application/obj`
`<remotemask/>`		
`<targetlocation>./data/out/done </targetlocation>`		Where to move files if upload was successful
`<errorlocation>./data/out/error </errorlocation>`		Where to move the files if the upload fails
`</message>`		

Also read through the comments of the provided sample xml file for more about the configuration of *bc_parameters_production.xml*.

3.3 Running the upload and download scripts

The Bizconnect communication script can be executed manually or it can be scheduled to execute on a time-basis using the Bizconnect Event Manager & Daemon.

3.3.1 Running scripts manually

What?
The Bizconnect communication script can be executed manually. This method of connecting is mostly used for testing reasons. Also when you do not want to use scheduler included into Bizconnect, you can use this method. In this last case, you need to schedule the batch files into your own scheduler.

How?
You can do the upload or download by executing the Batch files that can be found in the subdirectory *scripts* of the Bizconnect installation folder. For connecting to the production environment of BaswareONE you can use **download_production.bat** and **upload_production.bat**.

3.3.2 Running scripts automatically

What?
When the scripts have been configured and tested, you need to schedule the scripts in order to run automatically. This can be done with the build-in Bizconnect scheduler: the 'Bizconnect Event Daemon'.

How?
This scheduler can be started manually (3.3.2.1) or can be installed as a Windows Service (3.3.2.2).

Timing?
Download: every hour from 06 to 18 hours at minute xx:01 and xx:30
Upload: every hour from 06 to 18 hours at minute xx:03 and xx:33

You can change those settings. For more detail about using the Event Manager, please refer to the Bizconnect User Guide that can be found in the Bizconnect Program Group (*START* menu) or *C:\Bizconnect\manual\Bizconnect_User_Guide.pdf*.

3.3.2.1 Running Bizconnect Event Daemon (Scheduler) as Windows Service

- In order to run the scripts as a windows service you should install the Bizconnect Event Daemon as Windows Service by executing the Batch file **register.bat** that can be found in the *bin* folder of the Bizconnect installation folder.

- Open the Windows Services Panel (go to *START->settings->control panel ->administrative tools ->services*)
- Go to logon tab and select "*This account*"
- Select a user with administrator rights and enter the password of that account.
- Start the 'Bizconnect 3' service.

If you cannot run the Bizconnect Event Daemon as a Windows Service, you can manually start the scheduler, as described next.

3.3.2.2 Manually start the Bizconnect Event Daemon (scheduler)

What?
This method should only be used when method 3.3.2.1 is really not possible on your computer. The disadvantage of this method is that when the computer reboots, the event daemon must be started manually and this can be forgotten.

How?
- To start the Event Daemon manually, start it from the Bizconnect Program Group (START menu) or run c:\bizconnect\bceventdaemon.bat
- You can change the Event configuration (e.g. make it execute more frequently) by using the Event Manager that can be started from the Bizconnect Program Group (START menu) or running c:\bizconnect\bceventmngr.bat

3.3.2.3 Running Bizconnect Event Daemon (Scheduler) as Windows 2008 R2 Service

- In order to run the scripts as a windows service you should install the Bizconnect Event Daemon as Windows Service by executing the Batch file ***register.bat*** that can be found in the bin folder of the Bizconnect installation folder. This can also be done using the installation wizard.
- Open the Windows Services Panel (go to *START* → C*ontrol panel* → *System and Security* → *Administrative tools* → S*ervices*)
- Go to logon tab and select "*This account*"
- Select a user with administrator rights and enter the password of that account.
- Start the 'Bizconnect 3' service.

If you cannot run the Bizconnect Event Daemon as a Windows Service, you can manually start the scheduler, as described in section 3.3.2.2 Manually start the Bizconnect Event Daemon (scheduler).

3.4 Troubleshooting Bizconnect

Bizconnect will create log files in the logging folder, and will contain debugging and error information:
- cc.log: information from the actual communication: connect, download, upload
- ed.log: information from the Event Daemon (scheduler).

4   Bizconnect upgrade

- Make a complete backup of your current Bizconnect installation folder.
- Download the latest install.exe file from your account at https://www.baswareone.com/bcclient
- Execute this installer. Choose your current Bizconnect installation folder as the installation folder in the installation wizard. Your current audit data (c:/bizconnect/data) will not be touched by this re-installation.

5   Documentation

More information about Bizconnect can be found in the following Bizconnect documents in the ./Bizconnect/manual folder or via *Start > Programs > Bizconnect*:
- Bizconnect User Guide
- Bizconnect Technical Reference

6   Helpdesk

Our helpdesk can be contacted during normal office hours via:

- E-mail: ts.servicedesk.europe@basware.com
- Web: http://www.basware.com/support

> **Note:** *When sending information about Bizconnect problems to our customer service, it is advised to add a zip-file in attachment, containing: the logfiles ./logging/cc.log, ./logging/ed.log and all files out of the scripts folder under the Bizconnect folder. This should result in a quicker resolution of the problem.*