

SERVICE ORDER SCHEDULER

SOSWEB

Documentation

TABLE OF CONTENTS

OVERVIEW	1
SYSTEM HIGHLIGHTS	1
GETTING STARTED: THE INSTALLATION PROCESS	2
SOSWEB PROPERTIES.....	4
PROPERTY FILE PATH.....	4
AS/400 CONNECTION.....	5
ENVIRONMENT VARIABLES	6
HTML BACKGROUND FILES	7
SIGN-IN ACCESS CONTROL.....	8
DEFAULT VALUES	9
SCHEDULER API'S.....	10
MOVE IN/OUT ORDER TYPES	11
NEW CUSTOMER DEFAULTS	12
VALID SERVICE ORDER TYPES	13
APPENDIX A – CREATING CUSTOM HTML HEADER AND TRAILER FILES.....	15
HTML HEADER FILE	15
HTML TRAILER FILE.....	15
APPENDIX B – CONNECTING SOSWEB TO AN EXISTING WEBSITE.....	16
CALLING SOSWEB USING A HYPERLINK	16
CALLING SOSWEB FROM AN HTML FORM.....	16
BYPASS THE SIGN-IN SCREEN, WITHOUT CHANGING THE PROPERTIES FILE	16

SERVICE ORDER SCHEDULER

SOSWEB

Overview

SOSWEB is an add-on module for the SERVICE ORDER SCHEDULER product by *InsightAtlast*, and is designed to allow Customers to schedule their own service work over the Internet. The application can be tailored to allow only certain types of orders to be created, and the scheduled orders are fully integrated with the SERVICE ORDER SCHEDULER database so that resource requirements can be easily managed.

System Highlights

- Written in Java and designed as a servlet, SOSWEB can be inserted into an existing website with little or no modification.
- SOSWEB can be easily tailored to match the look-and-feel of your existing website.
- All service orders created and scheduled using SOSWEB are fully integrated with your CIS database.
- SOSWEB checks to make sure that duplicate service requests are not created for the same service address.
- Customers can maintain their own passwords.
- Customers can view their service order history on-line.

Getting Started: The Installation Process

SOSWEB can be installed on any system that meets the following requirements:

- Java Virtual Machine (JVM) of at least version 1.2
- HTTP server (Apache, MS-IIS™, JRun™, etc.)
- Webserver that supports the Java Servlet API 1.1 (WebSphere©, JRun™, etc.)

SOSWEB comes with the following components:

- sosweb.jar
- soswebproperties.jar
- jt400.jar

Installation instructions:

1. Copy **sosweb.jar** and **jt400.jar** to a local directory on the webserver. *It is recommended that these files be copied to a directory associated with the servlet engine, which is usually called something appropriate like “**servlets**”.*
2. Modify the webserver to include both of these archive files in the classpath of the servlet engine. *Refer to the webserver documentation if you are not sure how to change this setting.*
3. Extract the contents of the **soswebproperties.jar** archive file using WinZip (or similar product) to a directory on a local PC. This can be any local PC, not necessarily the same PC that is hosting the webserver. *It is recommended that you extract the contents of this archive to the root directory of the target PC (e.g. C: drive).*
 - a. If you extract the files to another location, you will need to modify the batch file that sets the operating environment for the SOSWeb Properties Wizard. Locate the **SWPEnvVariables.bat** in the */SOSWebProperties* directory created above, and edit it using any text editor. Change the following entries to include the path that you chose when extracting the **soswebproperties.jar** contents:

```
SOSWEBPROPDIR=<path to files>\sosweb\SOSWebProperties
SOSWEBPROPCLASSPATH=<path to files>
```

Save the changes and exit the editor.

4. Locate the **SWPWIZ~1** file (Windows 95/98/ME) or the **SWPWizard.bat** (Windows NT/2000) in the */SOSWebProperties* directory created in step 3. Double-click on the appropriate file to launch the SOSWEB Properties Wizard. Once all of the data has been updated in the *SOSWeb.properties* file, continue with step 5.

5. Add an entry to the Servlet engine so that it can recognize requests for the SOSWEB servlet. You will need to provide the following setup information in order to create a servlet entry:

Name = sosweb.SOSWeb Arguments = propertyfilepath = <i><path specified in step 4></i> Preload = No

Consult the documentation for the servlet engine if you are not sure how to add a new servlet entry.

6. You are now ready to call SOSWEB. From a browser, enter the following URL:

`http://<webserver IP address>/servlet/SOSWeb`

Note that the servlet name (SOSWeb) is case-sensitive, and will not work unless you specify it exactly the same way that you did it in step 5.

SOSWeb Properties

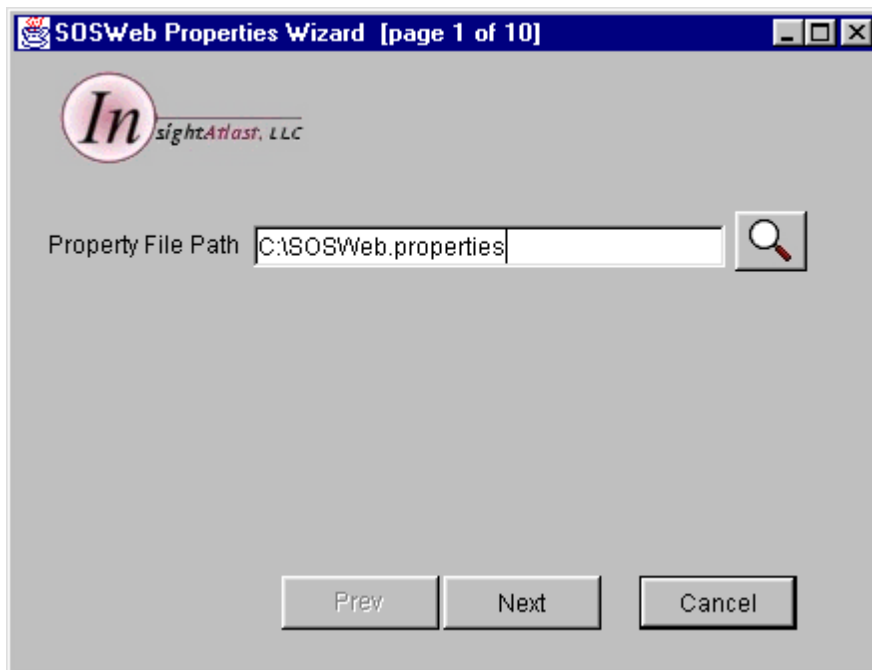
Before you can allow your Customers to schedule their own service orders, you must define how SOSWEB will operate by updating the properties file associated with the application.

During installation of the product, you were asked to extract the contents of the **soswebproperties.jar** file to a local PC directory. Locate the **SWPWIZ~1** file (Windows 95/98/ME) or the **SWPWizard.bat** file (Windows NT/2000) in the */SOSWebProperties* directory on that PC. Double-click on the appropriate file.



If you do not see the SOSWebProperties Wizard screen after executing the correct batch file, then it's likely that the **java.exe** command cannot be found in the local PC execution path. Update the PATH statement on the PC and retry the batch file.

Property File Path

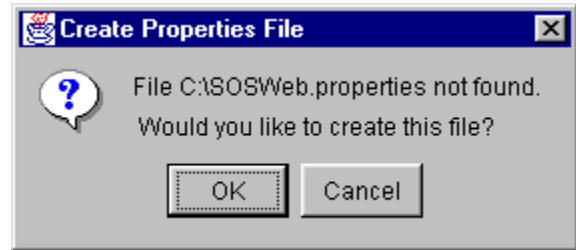


The first page of the SOSWeb Properties Wizard specifies the path to the SOSWeb.properties file. *You need to note where you store this file as this path will be required when you create the servlet entries in the webserver.*

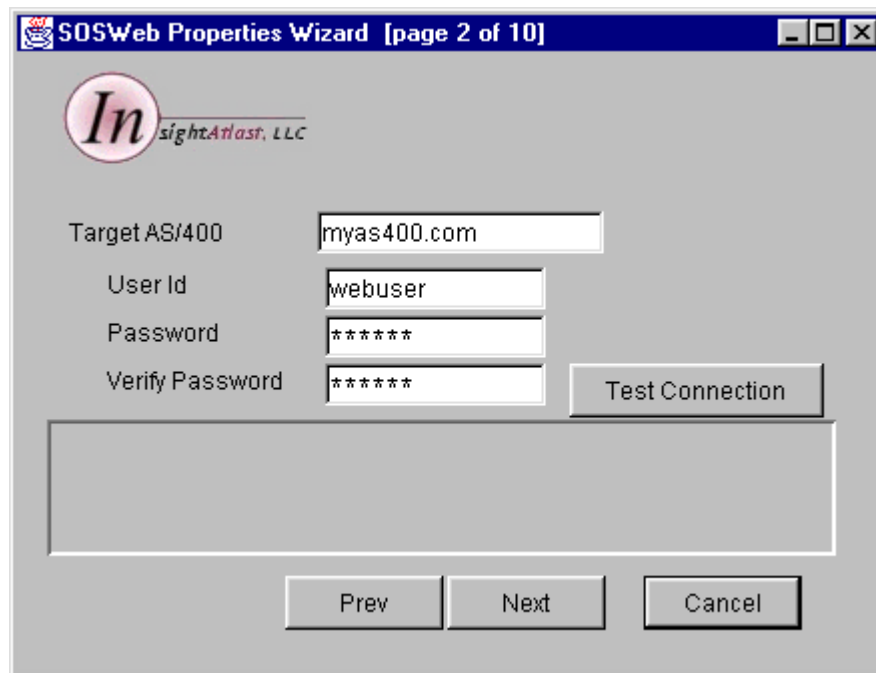
It is important that you place this file in a folder that is directly accessible from the webserver.

Once you have selected a location to store the properties file, press the *Next* button to continue.

If the SOSWeb.properties file cannot be found at the location you have specified, you will be prompted to create a new version of the file. Select *OK* to create the file or *Cancel* to enter a new location.



AS/400 Connection



Target AS/400 – This URL points to the AS/400 that is hosting the Service Order Scheduler application. This is a required value, and can contain a valid **URL** (i.e.: www.myas400.com), **IP Address** (i.e.: 198.0.0.1), or “**localhost**“ (if the webserver is running on the host AS/400).

User Id – This is a valid User Id from the host AS/400. It is recommended that you create a unique User Id for running the SOSWeb application as this makes it easier to control access to system objects and to set the correct library list on the AS/400. If you are running the webserver from same AS/400 that is hosting Service Order Scheduler, or you are connecting from one AS/400 to another, you can specify ***current** as the User Id.

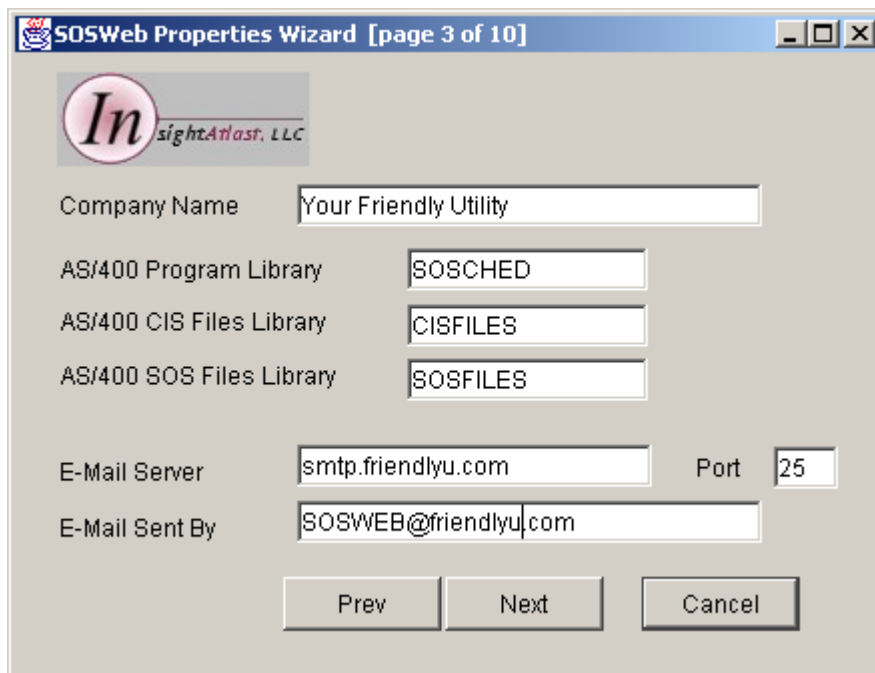
Password – This is the password associated with the AS/400 User Id specified above. Again, if you are running the webserver from same AS/400 that is hosting Service

Order Scheduler, or you are connecting from one AS/400 to another, you can specify ***current** as the Password (just like with the User Id).

Verify Password – This value must match the Password specified above, and is used to validate that you did not make a mistake when keying the original Password.

Test Connection button – Once you have specified all of the connection information on this screen, you can validate the entries by pressing this button. The Wizard will attempt to connect to the designated AS/400, and will alert you of the results in the text box below the button.

Environment Variables



The screenshot shows a window titled "SOSWeb Properties Wizard [page 3 of 10]". The window contains the following fields and buttons:

- Company Name: Your Friendly Utility
- AS/400 Program Library: SOSCHED
- AS/400 CIS Files Library: CISFILES
- AS/400 SOS Files Library: SOSFILES
- E-Mail Server: smtp.friendlyu.com
- Port: 25
- E-Mail Sent By: SOSWEB@friendlyu.com
- Buttons: Prev, Next, Cancel

Company Name – This is the name that will appear within SOSWeb as the host of the website.

AS/400 Program Library – This is the location of the API programs on the host AS/400.

AS/400 CIS Files Library – This is the location of the CIS data files on the host AS/400.

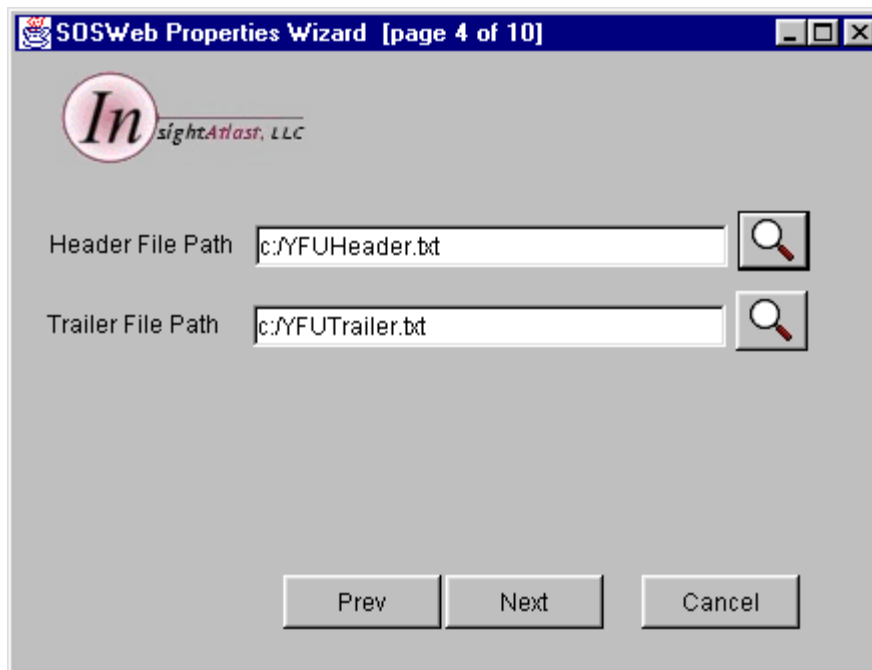
AS/400 SOS Files Library – This is the location of the Scheduler data files on the host AS/400. This will default to the value in the *AS/400 CIS Files Library* if left blank.

E-Mail Server – SOSWeb will send confirmation e-mails once a service order has been created and scheduled, if a valid SMTP mail server is specified here.

Port – the TCP/IP port number used for outgoing mail by the E-Mail Server.
E-Mail Sent By – this is the name that will appear as the sender of the confirmation e-mails. This can be a valid e-mail address (so that Customers can reply to the confirmation message), or a bogus one (you should note this in the confirmation message).

HTML Background Files

One of the ways that SOSWeb can be easily integrated into an existing website is through the use of the HTML Background files. The contents of these files can be used to render how the top (header), bottom (trailer), and background of each web page appears. *See Appendix A for examples of how to create these files.*

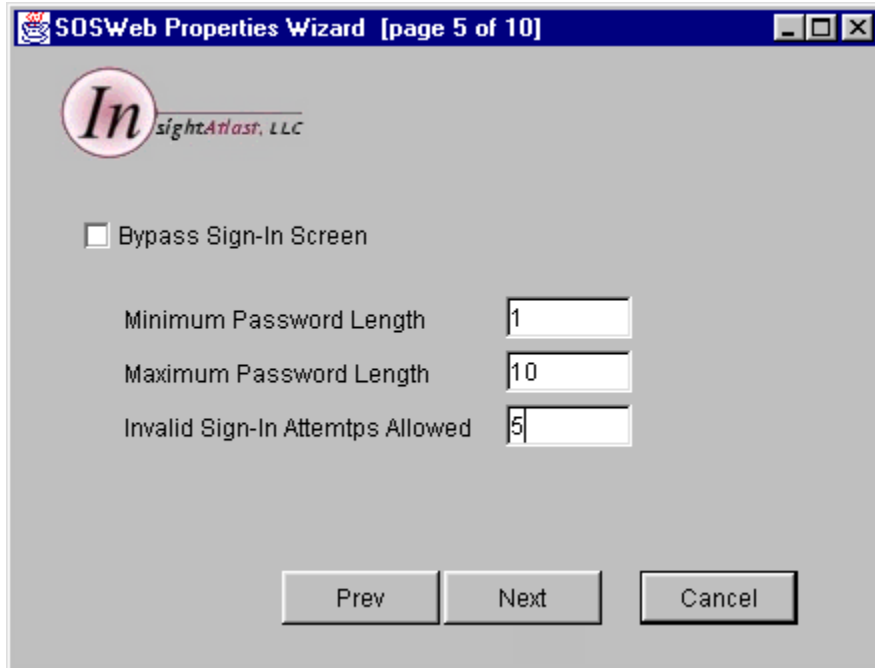


Header File Path – This is the fully-qualified path to the text file containing the HTML Header information for SOSWeb.

Trailer File Path – This is the fully-qualified path to the text file containing the HTML Trailer information for SOSWeb.

Sign-In Access Control

SOSWeb has built-in password security that allows it to be used completely independently from your existing website.



SOSWeb Properties Wizard [page 5 of 10]

In sightAtlas, LLC

Bypass Sign-In Screen

Minimum Password Length

Maximum Password Length

Invalid Sign-In Attempts Allowed

Prev Next Cancel

Bypass Sign-In Screen – If you already collect access information from your Customers prior to calling SOSWeb (i.e.: Account number, password, etc.), then you can bypass the sign-in screen for the application by checking this box. *See Appendix B for how to call SOSWeb from an existing website.*

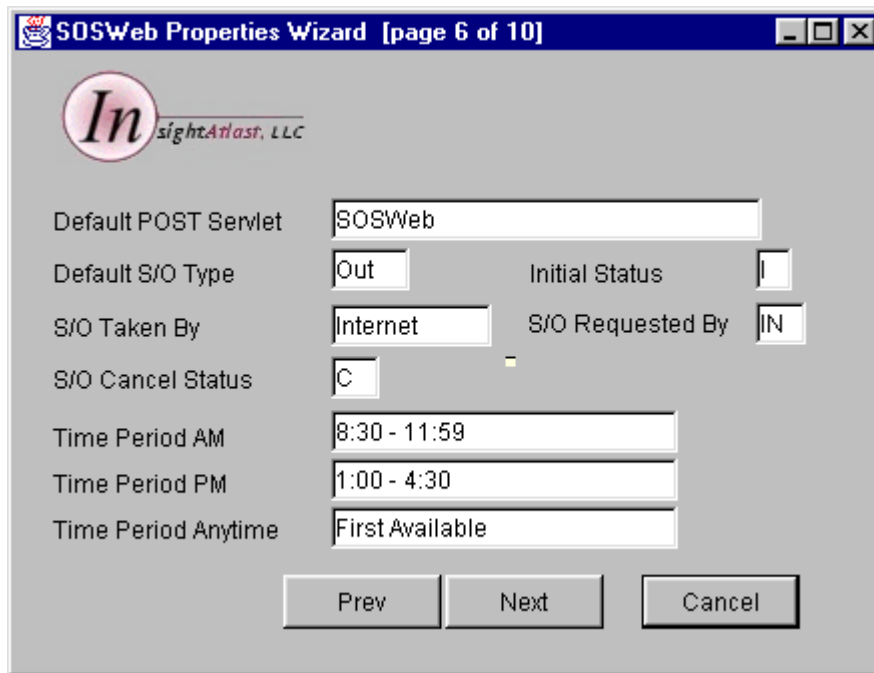
Note: the following fields cannot be modified if the “Bypass Sign-In Screen” box is checked.

Minimum Password Length – This is the least number of characters that can be used to create a valid SOSWeb password.

Maximum Password Length - This is the most number of characters that can be used to create a valid SOSWeb password.

Invalid Sign-In Attempts Allowed – This is the maximum number of consecutive invalid sign-in attempts before the password is inactivated. Once a password has been inactivated, the Customer must call the Utility in order to reactivate it.

Default Values



The screenshot shows a window titled "SOSWeb Properties Wizard [page 6 of 10]" with the InsightAtlas logo. The window contains the following settings:

Default POST Servlet	SOSWeb		
Default S/O Type	Out	Initial Status	I
S/O Taken By	Internet	S/O Requested By	IN
S/O Cancel Status	C		
Time Period AM	8:30 - 11:59		
Time Period PM	1:00 - 4:30		
Time Period Anytime	First Available		

At the bottom of the window are three buttons: "Prev", "Next", and "Cancel".

Default POST Servlet – This is the name of the servlet that is called when the user submits a form using SOSWeb. The default value is SOSWeb, which is the servlet that ships with the base package. You would only change this if you created a new controlling servlet class file.

Default S/O Type – This is the default selection presented to the Customer when they are asked which type of service they are requesting. This can be any type specified on the Valid S/O Types screen (*see below*), including the pre-defined types “**In**” (connect service), “**Out**” (disconnect service), and “**Xfer**” (transfer existing service).

Initial Status – This is the status code assigned to a newly created service order, prior to it being scheduled by the system. It is recommended that this value represent an “**inactive**” status so that your CIS is not cluttered with incomplete orders.

S/O Taken By – This is the value that is assigned to newly created service orders by SOSWeb, and represents the source of the order (i.e.: Internet, SOSWeb, etc.).

S/O Requested By – This is the value that is assigned to newly created service orders by SOSWeb, and represents who requested the order. This value should correspond to a valid entry in the CIS SRQB table.

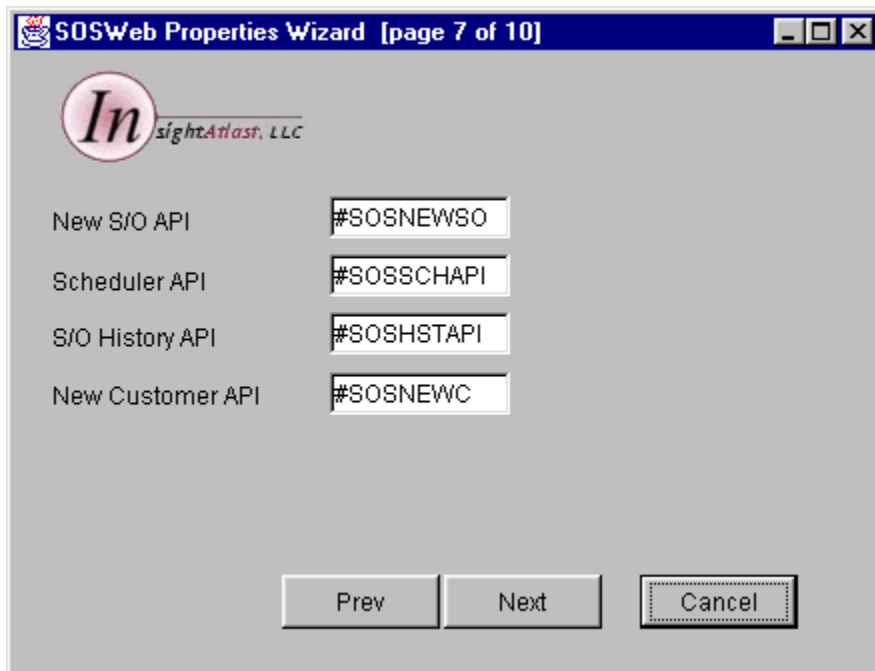
S/O Cancel Status – This is the status that is assigned to orders that are cancelled using SOSWeb.

Time Period AM – This is the description that displays when the Customer requests a morning schedule appointment. Leave this field blank if you do not want to offer morning appointments.

Time Period PM – This is the description that displays when the Customer requests a afternoon schedule appointment. Leave this field blank if you do not want to offer afternoon appointments.

Time Period Anytime - This is the description that displays when the Customer requests the first available time to schedule the service order.

Scheduler API's



The screenshot shows a window titled "SOSWeb Properties Wizard [page 7 of 10]". The window contains the logo for "In sightAtlas, LLC" and four input fields for API names:

New S/O API	#SOSNEWSO
Scheduler API	#SOSSCHAPI
S/O History API	#SOSHSTAPI
New Customer API	#SOSNEWC

At the bottom of the window are three buttons: "Prev", "Next", and "Cancel".

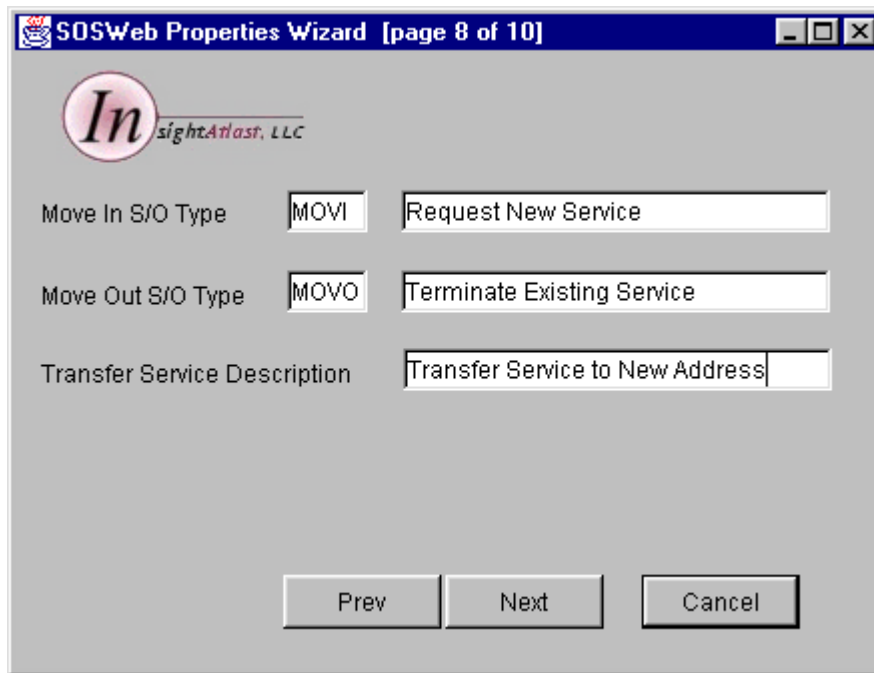
New S/O API – The name of the API that is called when a Customer requests to create a new service order.

Scheduler API – The name of the API that is called when a Customer requests a schedule date and time.

S/O History API – The name of the API that is called when a Customer requests to view their service order history.

New Customer API – The name of the API that is called when a user requests to be set up as a Customer of the Utility.

Move In/Out Order Types



The screenshot shows a window titled "SOSWeb Properties Wizard [page 8 of 10]". In the top left corner, there is a logo for "InsightAtlast, LLC" featuring the word "In" in a stylized font. Below the logo, there are three rows of input fields:

- Move In S/O Type:** The first dropdown menu is set to "MOVI" and the second text box contains "Request New Service".
- Move Out S/O Type:** The first dropdown menu is set to "MOVO" and the second text box contains "Terminate Existing Service".
- Transfer Service Description:** The text box contains "Transfer Service to New Address".

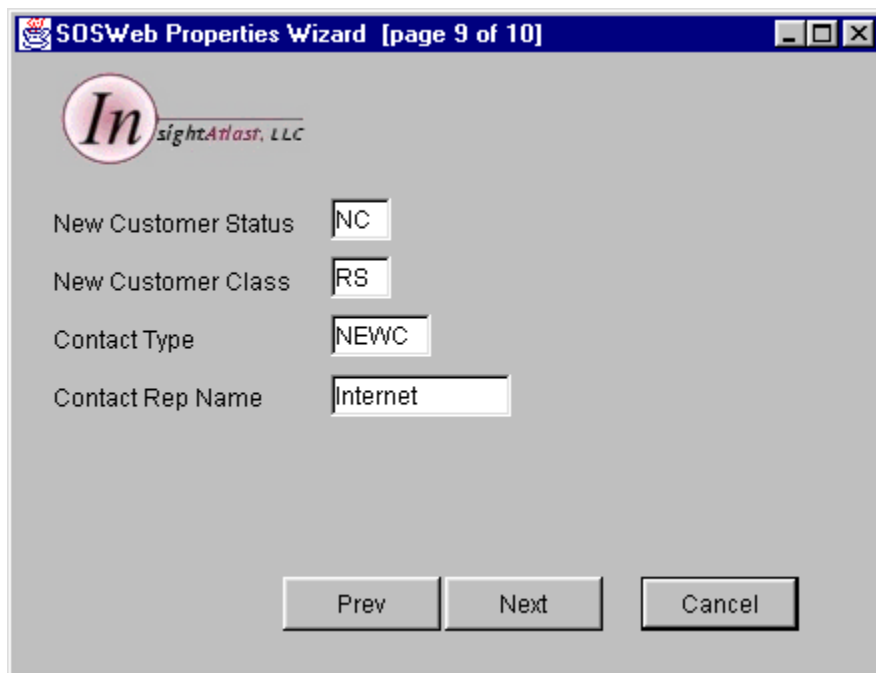
At the bottom of the window, there are three buttons: "Prev", "Next", and "Cancel".

Move In S/O Type – If you want to allow Customers to request new service using SOSWeb, enter the connect service order type here. Enter the description that you would like displayed when a Customer selects a new connect order type. If specified, this order type is substituted wherever the pre-defined type “**In**” is used.

Move Out S/O Type – If you want to allow Customers to request to disconnect existing service using SOSWeb, enter the disconnect service order type here. Enter the description that you would like displayed when a Customer selects a disconnect order type. If specified, this order type is substituted wherever the pre-defined type “**Out**” is used.

Transfer Service Description – Enter the description that you want displayed when a Customer selects the transfer service option. If you do not wish to offer the transfer service option using SOSWeb, leave this field blank. If specified, this order type is substituted wherever the pre-defined type “**Xfer**” is used.

New Customer Defaults



SOSWeb Properties Wizard [page 9 of 10]

In *sightAtlast, LLC*

New Customer Status:

New Customer Class:

Contact Type:

Contact Rep Name:

Prev Next Cancel

New Customer Status – This is the status assigned to a newly created Customer (Account) record using SOSWeb. This is a required field in CIS, and this value must correspond to a value in the CIS UAST table.

New Customer Class – This is the bill class assigned to a newly created Customer (Account) record using SOSWeb. This is a required field in CIS, and this value must correspond to a value in the CIS UCLS table.

Contact Type – If specified, a Utility Contact record with this type is created in CIS whenever SOSWeb creates a new Customer record.

Contact Rep Name – Used in conjunction with the Contact Type above, this is the CIS Representative that is assigned to the newly created Utility Contact.

Valid Service Order Types

S/O Type	Description
INSP	Inspection
HEATR	Service Heater

Include Move In Type – Check this box if you want to allow existing Customers to request new service using SOSWeb. *This checkbox is only available if you have specified a Move In S/O Type on the Move In/Out Types screen.*

Include Move Out Type – Check this box if you want to allow existing Customers to request to disconnect service using SOSWeb. *This checkbox is only available if you have specified a Move Out S/O Type on the Move In/Out Types screen.*

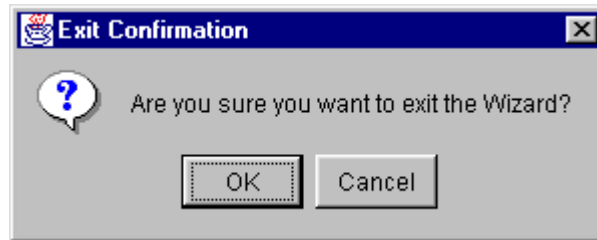
Include Transfer Type – Check this box if you want to allow existing Customers to request to transfer service to a new location using SOSWeb. *This checkbox is only available if you have specified a Transfer Service Description on the Move In/Out Types screen.*

S/O Type | Description – Enter any additional service order types that you want to make available to your Customers through SOSWeb. The S/O Type value corresponds to values in the CIS SOCD table, and the Description displays as a service type for the Customer to select.

Once you have entered all of the properties, you can press the *Finish* button to save the file to the location specified on the first screen.



You can exit out of the properties Wizard from any of the screens by pressing the *Cancel* button. You will asked to confirm that you want to "exit the Wizard" because doing so will cause any values that you've keyed up to this point to be lost.



Appendix A – Creating custom HTML Header and Trailer files

It is important to maintain the same look-and-feel on all of the pages of a website, and to that end we have provided a method to easily integrate SOSWeb into your existing company website. You can create text files that SOSWeb will use to render the top, bottom, and background for each displayed page.

HTML Header File

```
<html>
<head>
<title>service order scheduler - Web Access</title>
<style>
<!-- a:link {text-decoration: none;} a:visited {text-decoration:no
</style>
</head>

<body bgcolor="#FFFFFF" text="#000000" link="#000000" vlink="#000

<h1><center>Service order scheduler</center
<hr>
</h1>
```

The typical HTML page is divided into sections containing Header information (<HEAD></HEAD>) and Content (<BODY></BODY>). Use the HTML Header file to specify the Header section as well as the beginning of the Content section. This information would include things normally displayed at the top of the page (Company logos, images, banners, links, etc.) as well as the background for the entire page (e.g.: <body bgcolor="#FFFFFF" ...).

HTML Trailer File

```
</div>
</form>
</body>
</html>
```

Included in the HTML Trailer file is any information normally displayed at the bottom of a page (copyrights, links, etc.), as well as the closing tags for the Content section (</BODY>) and the Document (</HTML>).

Appendix B – Connecting SOSWeb to an existing website

You can call the SOSWeb servlet using any of the methods specified below. If your existing website already controls Customer access (i.e.: requests a password), then there is no need to have SOSWeb do the same. To bypass the sign-in screen, you can either change the properties file or call SOSWeb with the “*External*” parameter¹.

Calling SOSWeb using a hyperlink

Example:

```
<a href="www.myas400.com/servlet/SOSWeb">Request Service</a>
```

Calling SOSWeb from an HTML Form

Example:

```
<form action="http://www.myas400.com/servlet/SOSWeb" method="POST">  
<input type="submit" name="button" value="Request Service">  
</form>
```

Bypass the Sign-In screen, without changing the properties file

Example:

```
<a  
href="www.myas400.com/servlet/SOSWeb?screenName=External&accountNumbe  
r=1234567">Request Service</a>
```

* substitute a valid CIS account number for the 1234567 value above.

¹ You must also provide SOSWeb with a valid CIS Account number.