

Solution Centre Help

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Introduction

Introduction

The LBMX Solution Centre is a virtual "filing cabinet" that handles and processes documents between the EDI (Electronic Data Interchange) and ERP (Enterprise Resource Planning) stages. It replaces cumbersome, difficult to use paper documents with searchable, trackable electronic documents that are accessible with the click of a mouse.

Using the Solution Centre you can:

- search, view, print, and track in- and outbound documents
- check documents for errors and receive error notifications
- export inbound documents into your accounting/ERP system
- export inbound documents into the LBMX Document Centre
- track sales data and buying patterns, and generate reports
- track and calculate rebate data, to the line item level
- assign products to rebate categories, and set up rules to automatically calculate rebate amounts for both buy-side and sell-side rebates
- automatically or manually reconcile rebates
- generate completely customizable reports based on the data flowing through the system, and export them in Excel, Excel plain-text, Word, or web (HTML) format
- generate customized payout records, and track payout data
- generate cost analyses and reports
- pay or collect on items using NACHA-formatted Electronic Funds Transfer documents (by arrangement with your trading partners and financial institutions)
- set up and manage Events to the line item level
- track user data by user name, computer, login/out time, license status, and module used

Help Contents Note

This help covers all the existing features and functions of Solution Centre, Document Processor, Rebate Calculator, and Application Monitor. Depending on which modules your organization has purchased, not all these features may be available to use.

About LBMX

LBMX is a leading provider of group solutions, with a focus on buying groups, purchasing co-operatives, franchisors, and their members. These solutions comprise rebate and purchase analysis software, member electronic document delivery and complete EDI services to assist members and groups to connect to suppliers.

Logging In

Note: You can no longer log into the application or any of its partner applications unless the date format on your workstation matches the date format on your server.

For information on changing the date format on your workstation, please see your system administrator.

To log in:

1. Open the Solution Centre by double-clicking the executable (.exe file) or a desktop shortcut. The main login window appears, as shown below.



2. Type your User Name and Password in the fields provided, then click **Login** or hit return. You can use the drop-down list to select a database from the server to which the application is connected.

Note: If you do not have a User Name and Password, ask your Solution Centre administrator to create an account for you. If the application notifies you that your account has been [inactivated](#) in error, contact your Solution Centre administrator.

If you need to change the server to which the application is connected, click in the Username field, then hit **Alt+D**. In the Select Database window, select the new server name from the drop-down list, or type a server name, then click **Select Server**.

If you use more than one server with your Solution Centre install, Solution Centre will remember which servers you have previously logged into. You can remove a server from the list by clicking the X button.

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On clicking Select Server, list of databases will appear in the Select a Database field. Click on one to highlight it, then click **OK**.

3. The LBMX Solution Centre main screen opens, as shown below. Use this screen to select an application module to run. Active application modules are outlined in red, and inactive modules are dimmed. To cancel out of this screen, click the Close button at the bottom right corner.



The main Solution Centre screen, showing active and inactive modules.

4. The application opens. If you go into Invoice Management and have any outstanding [warnings](#), a notification message will appear, as shown below.



You may also receive a notification message concerning rebate programs with missing or noncompliant components.

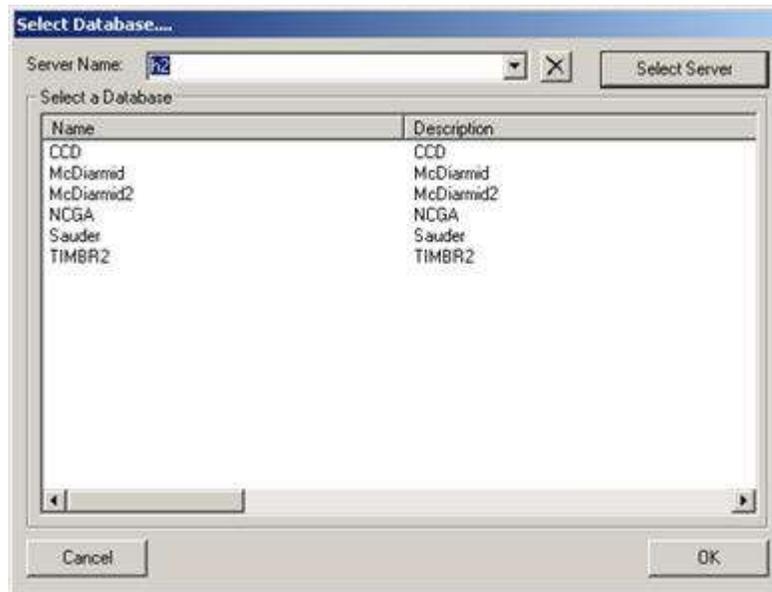
Clicking **OK** opens the application.

Note: When a new user logs on for the first time to the Invoice Management module, he or she will be prompted to set his/her [Grid Columns](#).

Logging In to Solution Centre While Disconnected from the Network

If your computer becomes disconnected from your network, you can still log in to Solution Centre if you have a Solution Centre database on your workstation. (For information on obtaining a local database, please contact your Solution Centre administrator.)

Double-click on the Solution Centre icon as usual. There will be a delay of approximately 30-90 seconds while the Solution Centre initializer searches for your database. A database error message may appear. If it appears, click OK. On clicking OK, the Select Database window will appear, as shown below:



Select a server from the drop-down list, or enter the name of your local computer (for example, the name of the test environment computer is sstewart), then click Select Server. A list of all your available local databases should appear in the Select a Database field. Click on one to select it, and then click OK.

Log in as usual.

User Roles

System Administrator

The system administrator is responsible for managing the computer systems at your work site. He or she is the person who has the information required to configure the **Mail Settings** feature, and also to keep Document Processor, the Solution Centre's document handling engine, running on the server, and for implementing and configuring the Solution Centre database applications. (The System Administrator may or may not be the same person as the Solution Centre Administrator.)

Application Administrator

The Application Administrator is the user to whom the initial application account is assigned, and initially has access only to the **Users** and **User Group** functions in the User Maintenance pane. He or she can set user permissions, add new users, edit user settings, and delete users. He or she can also assign users to user groups, create new user groups, deactivate and reactivate user accounts, and edit user group information.

Report Administrator

Report Administrators set up master reports and assign users to them in the **Security** tab of the Report Filter window, found under **Reports**. Users assigned to those master reports can see only the Sold Tos, Ship Tos, and Suppliers specified in those reports.

Rebate Administrators

Rebate Administrators have access to the **Unlock (Admin)** feature, and can unlock rebate programs that have been locked by any user, not just the user who locked them.

User

The user can perform functions with the application, based on the user permissions set for him or her by the Application Administrator. Not all users have all features enabled (for more information, please see **Setting User Permissions**), although this documentation contains information on all Solution Centre features.

User Group

Users can also be assigned to user groups. A user group is a set of users that have the same user permissions, that is, they can access the same features of Solution Centre.

Solution Centre administrators may wish to set up user groups if they have teams of users who all perform the same duties using Solution Centre. They can then assign those users to the user groups, since all users within those groups will have the same user permissions.

SQL Server Backups

This topic will outline some options and best practices for backing up your SQL databases used with Solution Centre. LBMX recommends you follow these or similar procedures in order to maintain your Solution Centre data integrity. The strategies presented here are just suggestions on some of the ways that you can ensure that in case of a failure you lose as little data as possible. There are numerous other methods available -- clustering and database replication, for example -- that could be employed to keep your data safe. Please see the Resources section at the bottom of this topic for further information.

Also included in this topic (see SQL Maintenance below) is a recommended procedure for maintenance to ensure optimal performance.

All backups should be stored on a separate disk from the actual database, to ensure that if there is a hard drive failure, the backups are not affected. You should store the backups on a separate device from the server so that if the server itself fails you still have access to your backups. A copy of the backups should be stored at an offsite facility. Backups should be kept for a minimum of a week. You may want to keep backups for longer than 7 days so that if there is a problem with the data that goes unnoticed for more than a week you still can recover your information from before the problem.

Here are three proposed strategies for creating and maintaining backups. Each of these strategies involve a certain amount of work versus a certain amount of risk of data loss. Your organization needs to weigh the costs and benefits to determine which is the appropriate strategy for you. You should always work with your IT department to make sure that your system setup meets your availability and disaster recovery requirements.

Basic Backup Plan

This backup procedure is easy to set up, maintain, and restore but is not optimal for many organizations because if there is a failure you could lose up to a day's worth of work.

1. The database should be in simple recovery mode.
2. Perform a full database backup each night.

The advantages to this plan are: It is easy to set up; it takes less time to maintain and restore, and uses the least disk space of any backup plan.

The disadvantages of this plan are: If you have a failure, you will lose up to a day's worth of data.

Intermediate Backup Plan

This procedure requires a bit more work to set up and more disk space to store the backups.

1. The database should be in simple recovery mode.
2. Perform a full database backup on a nightly basis.
3. Perform differential backups hourly during the day.

The advantages of this plan are: If there is a failure you would only lose up to an hour's worth of work. Also, it requires less disk space and maintenance time than the Advanced plan, but much better protection than the Basic plan.

The disadvantages of this plan are: It requires more disk space and invested labour to set up. It also does not provide as much protection as the Advanced plan does.

Advanced Backup Plan

This strategy requires more work than either the Basic or Intermediate plans to set up and maintain. This option does also require a bit more knowledge when restoring the backups.

1. The database should be in full backup mode.
2. Perform a full database backup nightly.
3. Perform differential backups hourly during the day.
4. Perform transaction log backups at quarter-hour intervals (h:00, h:15; h:30, h:45).

The advantage of this strategy is that in the case of a failure you would only lose up to 15 minutes worth of work. For added protection you could adjust the automated processes to perform transaction log backups more frequently between the differential backups.

The disadvantages of this plan are that it requires much more technical expertise, disk space, time, and effort to set up and maintain than either the Basic or Intermediate plans.

SQL Maintenance

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We suggest running a nightly maintenance plan the does the following tasks:

1. Check database Integrity
2. Rebuild all indexes
3. Update all statistics

Performance can be greatly compromised if the indexes and statistics are not maintained.

Resources

For additional information on backups, please see SQL Server 2008 Books Online:
<http://msdn.microsoft.com/en-us/library/ms187048.aspx>

For additional information on SQL server best practices, please see:
<http://msdn.microsoft.com/en-us/sqlserver/bb671432.aspx>