

Tantivy

A Tigertrak Product

April 19, 2012

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Chapter 1

Introduction

Tantivy is the new report mailing utility created by Tigertrak. Tantivy runs in the background and sends scheduled Tigerpaw reports to an e-mail address at regular intervals. It can also revolutionize your collection process by e-mailing invoices and reminders to customers.

Please use the following Quick-Start Guide as a checklist for a complete and successful installation. Reading through the chapters will provide insight as to exactly how things work. After completing the Quick-Start Guide, briefly review the appendix for answers to the most common questions, and known-issues that you should be informed of.

Quick-Start Guide

- Section 2.1 on page 3 explains the **installation of Tantivy on the “Server”** and any additional administrative workstations
- Section 2.2 on page 4 shows **Tantivy’s Config Utility** where you will, among other things, connect to your Tigerpaw Database
- Section 2.3 on page 5 details the necessary **setup that must be done in Tigerpaw** before Tantivy will function
- Chapter 3 on page 9 **reviews all available modules**, how to turn them on, and the details of how they work
- Start Tantivy’s Windows Service**; check the Event Log for a successful start up (section 2.1)
- Review the appendix** beginning on page 13
- Periodically check the Event Log** for errors or warnings

Chapter 2

Getting Started with Tantivy

At the heart of Tantivy is a Windows service which should be installed on only one computer. Although it is not necessary, installing Tantivy on a server would be the best choice so that it runs constantly. From here on we will refer the computer where Tantivy is installed the “server” for simplicity.

There is also a configuration component for Tantivy which must be installed on the server. We’ll call this configuration component the “config tool”.

2.1 Install Tantivy

Installing Tantivy is as simple as running the setup program, and following the on-screen instructions. If you are installing Tantivy on the server, be sure to leave both the Config Tool and Service components checked. When installing on a remote administration computer, be sure to uncheck the Service component during installation.

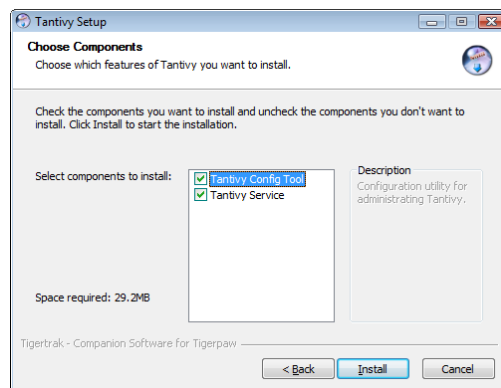


Figure 2.1: Setup - Choose Components

After installation, the Tantivy service will be installed, and an event log will have been created. The event log for Tantivy can be viewed by right-clicking on *My Computer* and selecting *Manage*. In the *Computer Management* dialog under *System Tools > Event Viewer* you will see Tigertrak Tantivy. The event log should contain an entry stating that the installation has been completed successfully. This event log will be where Tantivy reports information about it’s operations.

Next, under *Services and Applications > Services* Tigertrak Tantivy will exist as a service. Double clicking on this service allows you to start, stop, and manage the service options. Our recommended changes to the properties of this service are as follows:

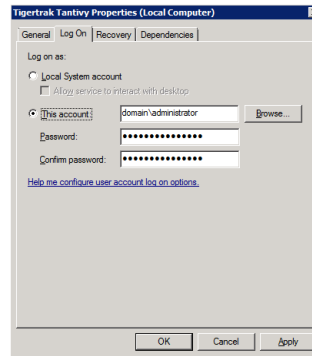


Figure 2.3: Tantivy Service Properties > Logon

General [tab] > Startup Type - Set to *Automatic* when ready to run Tantivy all the time, even after reboots.

Log On [tab] > Log On As > This Account - Using *Domain\Administrator* is a fine choice for the use to run Tantivy as a service. This user must be able to run local services, and also access any network file shares which contain Tigerpaw reports.

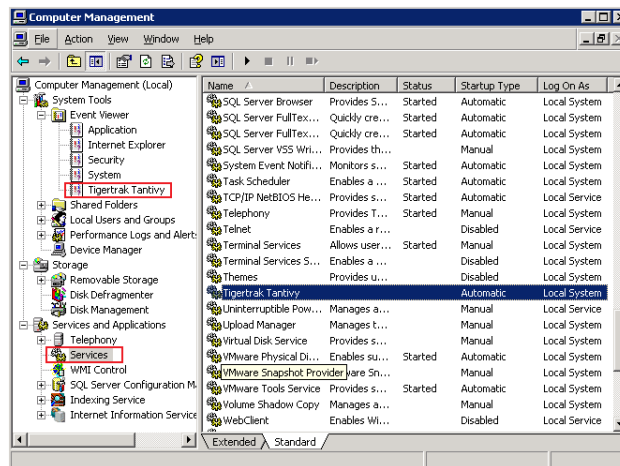


Figure 2.2: Computer Management - Pre Server 2008 / Vista

2.2 Configure Tantivy

If you were ambitious while reading the last section and tried to start Tantivy through the Computer Management dialog it would have informed you that the service started and immediately stopped. If, after trying to run Tantivy unsuccessfully, you checked the Event Logs you would know that there was a problem connecting to the database. To configure Tantivy for use run *Tantivy Config* found in the start menu under *Tigertrak > Tantivy*.

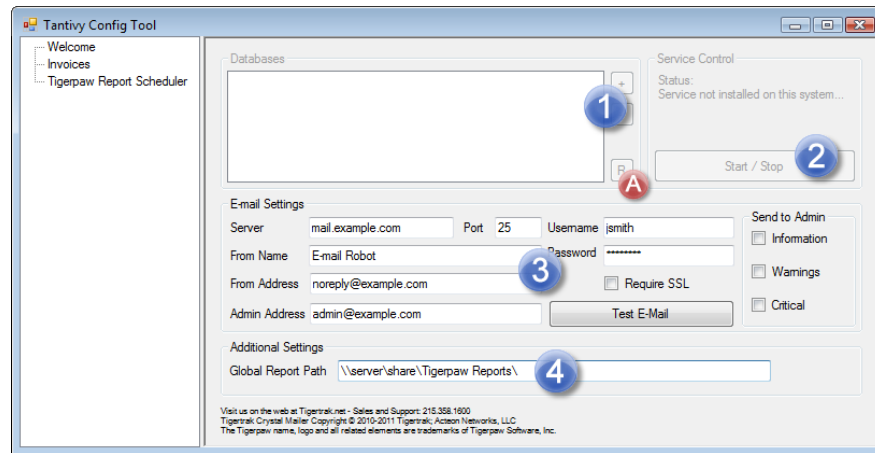


Figure 2.4: Tantivy Config

When it is run for the first time a *Database Connection* dialog will display. Choose any Tigerpaw database to connect Tantivy to. If you have never connected Tantivy to this database before it will ask you if you would like to install and register. The remaining options in the welcome dialog should be relatively straight-forward:

1. Databases shows a list of databases to which Tantivy is currently connected. The list acts as a way of configuring multiple databases from the Tantivy server. Select a database to configure it. Add new databases, or remove existing databases with the + and - buttons to the right.
 - (a) When a new database is selected the registration dialog will display. To view the registration dialog for a database after this initial registration, choose the database and click the R button.
2. This dialog reports the state of the Windows service, and will allow starting / stopping of the service when run on the server.
3. E-mail settings to connect to, and test a mail server. On the right hand side is the option to send information, warnings, and errors to the administrator.
4. Choose the Global Report Path from the server.

2.3 Configure Tigerpaw

Before we're ready to start Tantivy read through this section and configure Tigerpaw.

Ensure Reps have an Email Address

It is important that reps have an email address in their settings which will be used on occasion. Reps can be edited by going to *Edit > Master Tables > Rep > Account Reps* [in Tigerpaw]. The *E-mail 1* field can be found under the *Contact Info* tab.

Create a BookKeeper Contact Profile

Tigerpaw designates the recipient of an invoice using Contact Profiles. View your contact profiles in Tigerpaw by going to *Edit > Master Tables > Marketing > Contact Profiles*. Confirm that you have a contact profile suitable for this task, or create a new one. We like the term "BookKeeper" and going forward we are going

to use this as the designated name for the person in charge of receiving invoices from your company. You can use any term you'd like for your database.

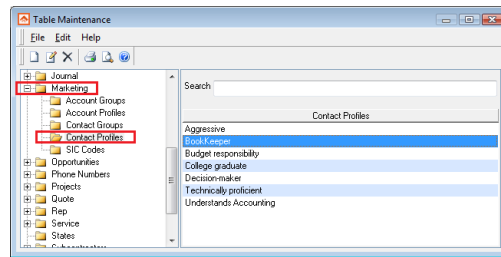


Figure 2.5: Master Tables > Marketing > Contact Profiles

Set the BookKeeper Contact Profile

Tigerpaw has an option to designate members of the BookKeeper contact profile as contacts who should receive invoices. This option is accessible in the Configure Accounting dialog under *Tools > Options > Accounting Interface*.

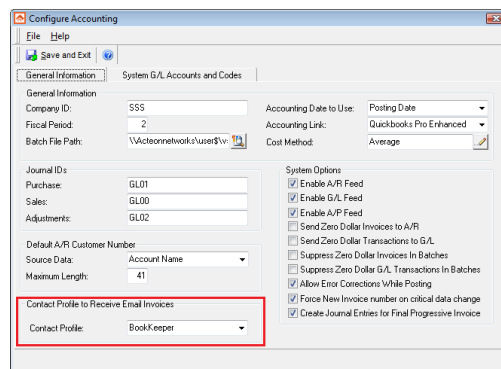


Figure 2.6: Accounting Options

Assign BookKeepers

Finally we're ready to assign the BookKeeper profile to our Tigerpaw account contacts who should receive invoices. To assign contact profiles, select a contact in an account, and *right-click* in the group and profile window to select *Add Profile*.

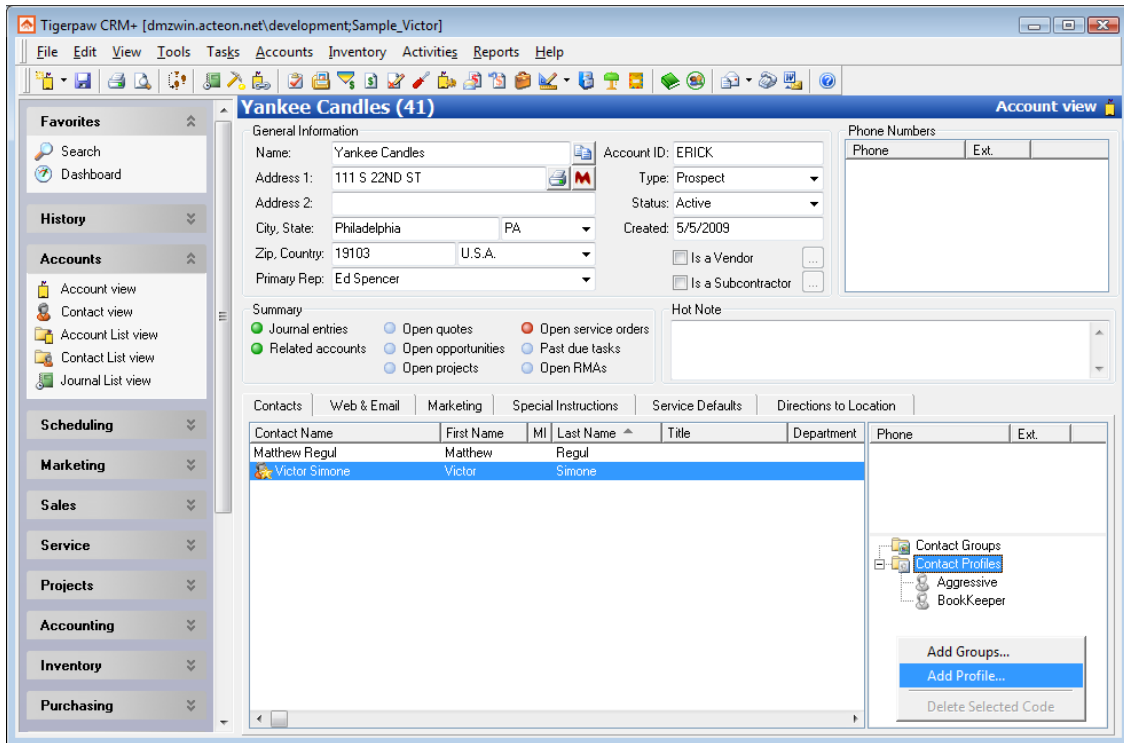


Figure 2.7: Assigning Contact Profiles

Chapter 3

Modules

The navigation tree along the left of the Tantivy Config utility displays the welcome dialog, and each of the available modules. Read these sections to clarify understanding of any options in a module, as well as the detail as to how each module works.

3.1 Invoices

Configure Invoices to send by setting the shared options, and sending options. The shared options consist of the invoice report to use relative to the global reports path selected in the previous chapter, and a BCC email address to receive all outgoing email addresses. Using the BCC field is an excellent way to see the results of Tantivy working to be sure it is configured as expected. Clicking on *Send Example* will prompt for an invoice number, and recipient e-mail address.

Each of the three desired sections - sending invoices, reminders, and receipts - must be enabled separately. When sending invoices, you can choose the action to take if an account has no contacts marked for receiving invoices (no BookKeeper profile assignments). At this time, the only option is to send the invoice to the rep who posted. Other options include selecting an account group to exclude from receiving invoices, reminders, or receipts.

Invoice Detail

After installing Tantivy

1. Invoices that have been posted, and are not yet paid will generate an invoice to be sent to the customer
2. The BookKeeper recipients will be put in the To field of the email
3. If no BookKeepers were found for an account, and the *Send to rep who posted* option has been enabled, the email will send to the rep who posted
4. If neither BookKeepers or a rep's email could be found an error is logged
5. Invoices which have logged an error will not be processed further

Reminders and Receipts work the same:

1. Reminders are sent first after 20 days, then every 7 days following the first reminder until payment is received; receipts are sent out as payment is received
2. The BookKeeper recipients will be put in the To field of the email
3. If no BookKeepers can be found, an error is logged and the invoice is not processed further

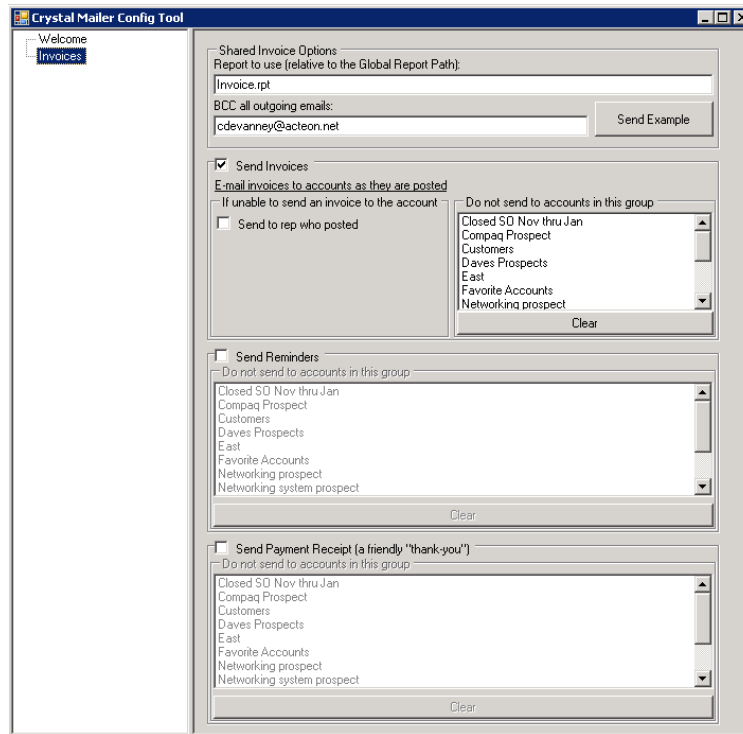


Figure 3.1: Invoice Options

3.2 Tigerpaw Reports

Tantivy can schedule existing Tigerpaw reports to be converted to a .PDF and delivered to an e-mail address.

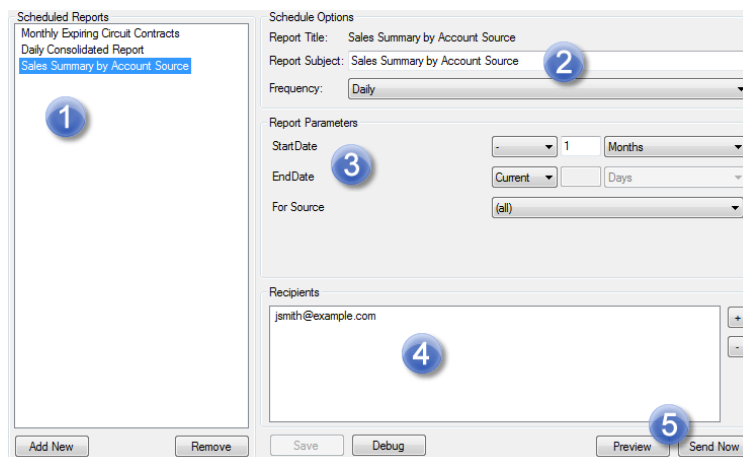


Figure 3.2: Report Scheduler

1. Scheduled reports are listed in the group box on the left. New reports can be added with the “*Add New*” button, existing scheduled reports can be removed with the “*Remove*” button.
2. After selecting an existing schedule or adding a new one, the options for the selected schedule are displayed to the right. The e-mail subject and frequency of report are adjusted first.

3. Report options are very similar to those presented when launching reports from Tigerpaw. However, you will notice in our image above that dates are displayed in a different manner. Rather than specifying a single date, Tantivy creates a date at the time a report runs relative to the current date. You can use this “current” date (the date when the report is run), or add/remove any number of days, weeks, or months to the current date.

For example. If a report requires a date range (two dates), and you want to see the upcoming week’s worth of data specify “current” for the start date, and “+ 1 week” for the end date. Likewise, to see last month’s sales numbers use “- 1 month” and “current”.

4. Recipients can be added or removed from the recipient list with the + and - buttons to the right.
5. Preview reports before saving to be sure they work as expected. You can send the report to all recipients immediately with the “*Send Now*” button.

Operation Detail

Here are some important details about how reports are sent.

1. When scheduling reports they will not send immediately: daily reports will send tomorrow; weekly on the first day of next week (Sunday); monthly reports on the first of the next month. Use the “*Send Now*” button if you’d like to e-mail the report now.
2. Daily reports are pretty simple. They’ll send each day at midnight or when the Tantivy service is next started if it were to have been stopped. Daily reports are forgotten at the end of each day if the report did not send successfully. In other words, if the Tantivy service was shut down for 3 days you will not receive all 3 daily reports once started.
3. Weekly reports are a little more forgiving. If a weekly report did not send, Tantivy will attempt to send that report for the entire week. After that week has passed, the failed report for that period is forgotten but the report will now attempt to send for the new period.
4. Monthly reports work similarly in that they will attempt to send for up to the first of next month and forgotten thereafter.
5. Date generation is based on the start date of a subscription period. That is, if your report sends out late it should still use the first day of the week or month.

The above detail may seem a bit lengthy but will help to explain the behavior of Tantivy in situations such as:

- If Tantivy has not run for a period of time, reports will try and send immediately after restarting it
- After subscribing to a report it will not immediately send the report
- If a subscription with no recipients is created, but then recipients are added, the report will immediately try and send

Appendix A

Frequently Asked Questions (FAQ)

Q: ..but does it do the Mersenne Twister?

Not yet, no, but we're always happy to hear ideas! Additions and modifications are typically prioritized according to the level of demand. We're also provide solid quotes for custom reports and modifications.

Appendix B

Errata

It's a matter of life: mistakes happen; problems come up. Here is a list of troubles we've had that just couldn't be addressed, or are waiting to be addressed.

Not all Tigerpaw reports work

No, not all Tigerpaw reports will work with Tantivy. Hundreds of reports do work, but many do not at this time. You should always “preview” a report before saving it to determine that the report will send without any errors.

Quirky Startup

The first time you start the Tantivy config utility you'll probably get a polite error related to the configuration. This is because no database connections exist yet - just complete the connection dialog and this shouldn't happen again (unless you delete the only available database, maybe).

Appendix C

Legal Stuff

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