



eWindEDI™ Pre-Launch Checklist (23 Sept. 2008)

Note before beginning: The installation of eWindEDI™ includes a two-week “grace” period, during which the initial EDI transactions may require some “hand-holding”. Problems may be encountered during this period, and Warren Lamb & Associates (WLA) will work with the client to ensure a full and complete resolution of all issues, with the minimal delay possible.

Part 1. *Information* Required before Installation

- Name, phone, and email address of IT contact for installation
 - Target date for full functionality
 - Method to be used for remote installation (e.g., PcAnywhere, Microsoft Meeting, etc.)
 - System Function: What transactions will eWindEDI™ process?
 - Dedicated email address for eWindEDI™
 - Email Parameters
 - SMTP/POP3 Addresses (preferred)
 - Login name (if different from email name) and password
- OR...**
- Installation of MS Outlook on the eWindEDI™ machine, for dedicated email address
 - Name(s) of the core business system(s) with which eWindEDI™ will exchange data files
 - Import and export data file layouts
 - NOTE: If the business system is unfamiliar, or internally developed, WLA will need to work with the client or system developer on custom translation specs
 - Source folder(s) for data files

These folders are usually a network share: a user in Accounts Receivable copies invoice files (for example) into the folder, where eWindEDI™ detects them. eWindEDI™ copies them internally, and removes them from the source folder



Contracts and Invoices must be filed separately. For example:

Z:\eWindEDI_Files\Invoices
Z:\eWindEDI_Files\Contracts

- NOTE: eWindEDI™ requires Read/Write access to the folder(s)
- NOTE: for certain systems, a more specific directory structure may be required
- “Alert” email list(s)

When eWindEDI™ receives acknowledgment of EDI transactions from a trading partner, it can send an “alert” message to one or more email addresses. For instance, alerts can be sent to an AR supervisor for invoices. Alerts can also be sent to your system administrator, application support person or EDI Coordinator.
- NOTE: For an initial startup period, an alert may also be sent to WLA, to help in monitoring the success of the installation
- List of trading partners to exchange EDI transactions , to build Agency.lst
 - NOTE: The spelling of the trading partner organization name is important. Trading partners are recorded in this lookup table, to direct eWindEDI™ transactions to their correct destinations
- Name of user to install eWindEDI™ reporting software (Toronto.exe) locally, for audit use

Part 2. *Samples* Required before the Installation

- Sample data files for the EDI transactions from relevant internal business systems
 - NOTE: If the client is unfamiliar with how to create these files, WLA can frequently help the client get in touch with the customer service desk at their system provider
- (From WLA) Sample reports for review by audit staff (from Toronto.exe):
 - Invoices and Acknowledgements Report
 - Contracts and Acknowledgements Report

Part 3. *Hardware* Required before Installation

- A Windows PC



- Running XP Pro, or Server 2003
- 1 gB memory
- 5 gB free disk space
- .NET framework version 1.1 or greater

Part 4. eWindEDI™ Installation Steps by WLA

- Create custom installation file, with client-specific encryption key
- Install eWindEDI™ via remote connection, at client
- Establish that eWindEDI™ is operating, and communications operate in both directions
 - Send a test PING from the installation to “wla”
 - Send a test PING from “wla” to the new installation
- Install data processing scripts and assure their operation
 - Verify that source folders for data files supporting EDI transactions are operational
 - Send sample EDI transactions to “wla”
 - Verify that samples translate as expected at “wla”
 - Verify that email alerts of acknowledgements are operating
- Update Codemail.lst with the latest eWindEDI™ collection of system codes and email addresses
- Install reporting software (Toronto.exe) locally on at least one user’s desktop, to track the progress of EDI transactions (e.g., invoices and contracts) through eWindEDI™.
- Inform WLA executive staff that the new installation is complete and fully functional.