

# *Gentran:Director*<sup>®</sup>

*for Windows*<sup>®</sup>

*Version 5.4*

## *User's Guide*

**Sterling Commerce**  
An IBM Company

**September 2007**

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# *Getting Started*

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# Introduction

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## Welcome

Gentran:Director<sup>®</sup> for Windows<sup>®</sup> provides you with the tools you need to electronically exchange data with your trading partners. These tool include the following:

- Data translation
- Process control
- Communications system

We believe that you will find this software, and its supporting materials, easy to use and beneficial to your business.

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# What's in this Manual

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## Introduction

This manual supports the online Help by assisting you with various tasks in Gentran:Director. This task-oriented approach provides step-by-step instructions to answer any questions you might have about Gentran:Director.

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## Intended audience

This manual is intended for the staff responsible for the following:

- Implementing EDI
- Setting up trading partner relationships
- Creating and using EDI documents
- Sending and receiving documents
- Acknowledging documents
- Tracking document flow
- Using accum tracking

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## Prerequisite knowledge

This manual assumes that you are familiar with using a PC and with Microsoft<sup>®</sup> Windows functions.

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## Conventions in this Manual

The following typeface conventions are used in this manual:

- |                           |   |
|---------------------------|---|
| <i>Sending a Document</i> | This typeface is used for emphasis or to indicate a chapter or section in this manual.  |
| <b>NEW</b>                | This typeface indicates a button in the program. Click the button with your mouse, or press <b>TAB</b> until the button is highlighted, and then press <b>ENTER</b> .                           |
| <b>F1</b>                 | This typeface indicates a key that you need to press on your keyboard. A plus sign (+) between key names indicates a combination of keys to be pressed together. For example, <b>CTRL + C</b> . |

## Description of contents

The *User's Guide* is organized into chapters. A brief description of each chapter is outlined below.

- *Chapter 2, Using Translation Objects* explains how to register (install), delete, and view translation objects.
- *Chapter 3, Using Partners* explains how to set up a complete partner profile. This chapter describes how to import or export a partner profile and partner tables, and describes how to copy a partner profile.
- *Chapter 4, Using Documents* explains all the facets of managing your documents.
- *Chapter 5, Using Communications* explains how to send, receive, and resend documents, and how to view the Send Queue.
- *Chapter 6, Using Interchanges* explains how to view interchanges and the documents within interchanges, how to filter the display of interchanges, and how to attach (link) an interchange to a partner.
- *Chapter 7, Using Acknowledgements* explains how to manually set a document to “acknowledged,” and how to define inbound and outbound acknowledgement criteria for document reconciliation.
- *Chapter 8, Using the Tracking and Audit Systems* explains how to view and print document tracking and audit log information.
- *Chapter 9, Using the Accum Tracking Extension* defines the Accum Tracking Extension and explains how to use accum tracking.
- *Chapter 10, Daily Processing* describes an example of the operational activities that may be executed as part of your daily processing.
- The *Glossary* contains definitions of EDI and Gentran:Director terms and concepts.
- The *Index* provides you with a page listing of terms, concepts, functions, and processes to enable you to quickly find them in this manual.

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## Online Help system

The majority of the documentation for Gentran:Director is contained in the online Help system. This includes dialog box element definitions, detailed processing information, and all the how to information that is contained in this manual.

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# Getting Support

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## Introduction

The Sterling Commerce Gentrans:Director software is supported by trained customer support personnel who are available to help you with product questions or concerns.

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## E-mail address

If you have questions or concerns with your software, you can send an e-mail to Sterling Commerce Customer Support at the following address: [pcbasedsupport@stercomm.com](mailto:pcbasedsupport@stercomm.com).

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## Phone number

If you have questions or concerns with your software, you can call 1-800-GENTRAN, option 7.

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## Before calling Support

To help us provide prompt service, we ask that you do the following before calling Customer Support:

- Attempt to recreate any problem that you encounter and record the exact sequence of events.
- Be prepared to provide us with the following information:
  1. **Mailbox number:**

A mailbox number is assigned to customers who have a mailbox on the Sterling Commerce network.
  2. **System Configuration**

Information about the primary system controller and all machines experiencing problems, including the computer manufacturer and model number, Windows version, amount of memory, available disk space, and the network adapter type.
  3. **Error Messages**

Record the exact wording of any error messages you receive and where the error occurred in the software.
  4. **Attempted Solutions**

Record any steps you performed to resolve the problem and note all the outcomes.

## Support on Demand

The Support on Demand Web site provides access to tools that allow you to gain up-to-the-minute information specific to your company. It also allows you to access additional tools for troubleshooting or getting assistance and information about your Sterling Commerce software.

The following table discusses the features offered by the Support on Demand Web site.

Feature	Description
Personal Profile	<ul style="list-style-type: none"> <li>■ Lists your personal profile and allows you to modify your profile information.</li> <li>■ Allows you to change your Support on Demand password</li> </ul>
Problem Reports	Provides detail about all technical support cases reported in the last 30 days.
Report a Case	Enables you to submit a technical support request for any problem or error that you might be experiencing with the product (s).
Knowledge Base	Enables you to troubleshoot problems and error messages.
Solution Subscriber	Allows you to register your e-mail address in order to receive notifications about solution-specific issues.
Educational Services	Allows you to view course descriptions and register online for training provided by the Sterling Commerce Educational Services team.

To access Support on Demand, complete the following steps:

1. Open your Internet browser.
  2. On the address line, type: **www.sterlingcommerce.com**.  
The Sterling Commerce home page is displayed.
  3. In the Customer Support section located near the center of the page, select **Support on Demand**.  
The Support On Demand login page is displayed.
  4. Do one of the following:
    - If you would like to register to use the Support on Demand Web site, click the link under New to the Site? After completing registration, a user name and password is assigned and sent to your e-mail address. The e-mail is sent to you from `vantive_admin@stercomm.com`.
    - If you do not want to register, but would like to demo the Support on Demand Web site, click **Site Demo** to log in as a guest user.
  5. Log in to the site using your user name and password.  
The Support on Demand home page appears, displaying your user profile and any problems you have reported.
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# Introducing Electronic Data Interchange

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## Overview

Electronic Data Interchange (EDI) is the paperless exchange of data between business partners in a standardized, computer-processible format. This business data includes invoices, purchase orders, and advance shipping notices.

In today's fast-paced business environment, EDI is a necessity. This need is driven by just-in-time (JIT) manufacturing schedules, customer-service demands, "partnering" with another company or sharing information systems, increasingly competitive business environments, and the need to establish and maintain the competitive advantage.

---

## Using EDI

The key to EDI is standardized data. EDI extracts information from your application and converts it into a standardized format that can be transmitted to your business partner. Transmitting information between two computer systems requires that the data and its format be expected, meaning it is an established format. Non-standard data or formats can introduce errors and confusion.

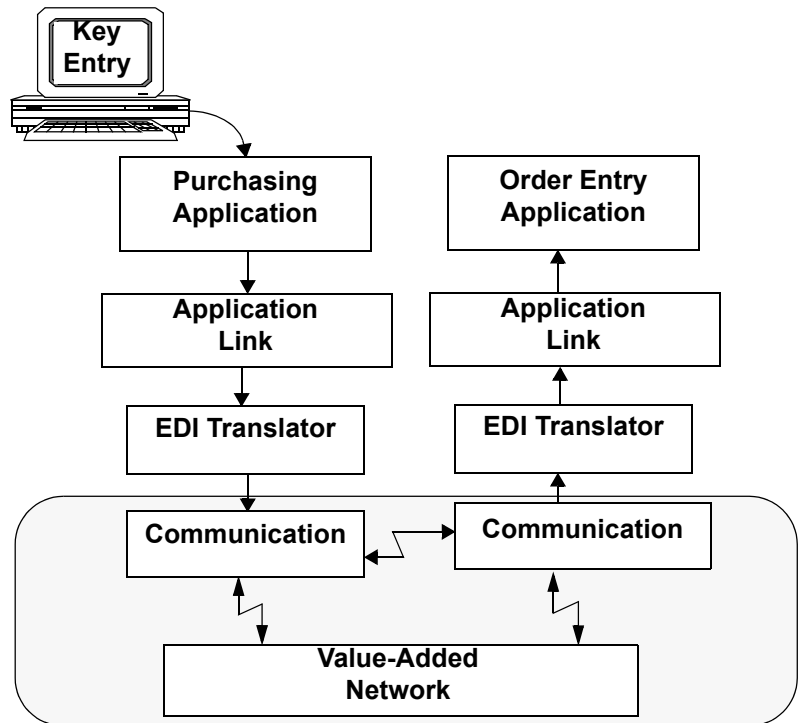
EDI standards regulate the syntax, structure, and content of the transaction data. EDI translators convert the data from your application format to a standard format such as ANSI X12, TDCC, VICS, EDIFACT, or TRADACOMS. At the receiving end, the standard format allows your trading partner's computer system to read the data so it can be automatically processed and interfaced with their internal applications.

The entire process can be accomplished in minutes, without the rekeying involved with manual document processing.



### Example

The following diagram illustrates the EDI process:



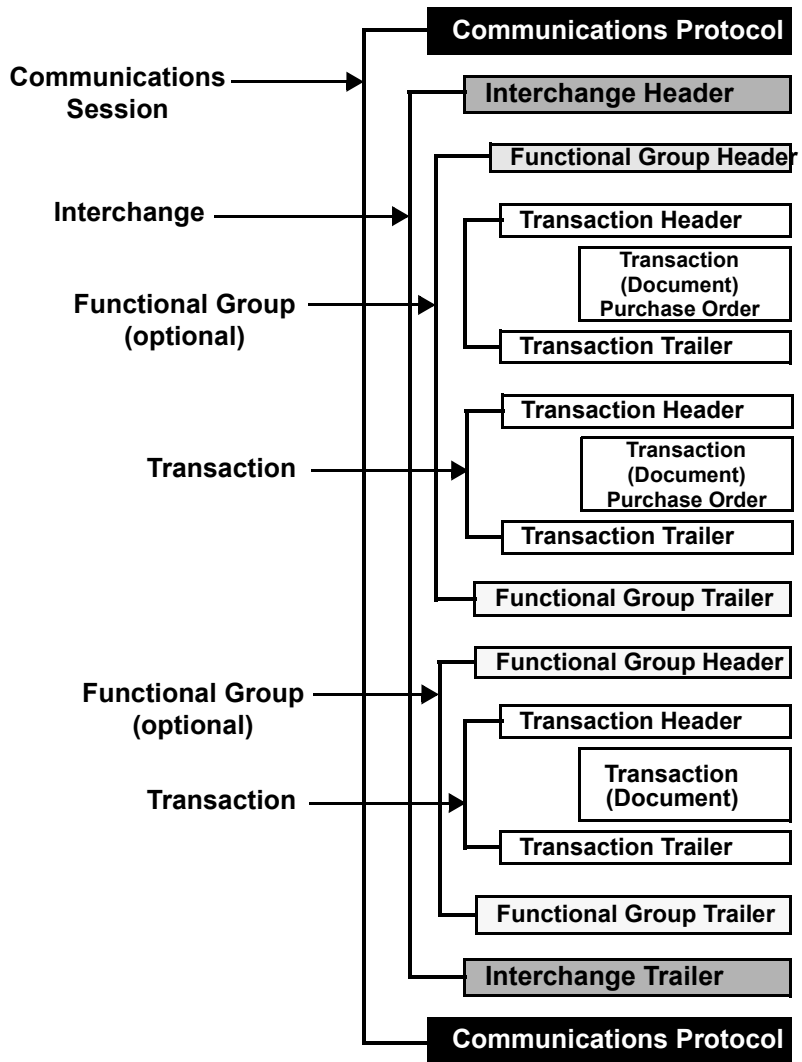
### Understanding the Structure of EDI

EDI structure can be divided into the following levels:

- Envelopes
- Transaction sets (documents)
- Segments
- Elements

### Diagram

The following figure illustrates the enveloping and EDI structure.



## Envelopes

EDI envelopes function in the same way as paper envelopes. They separate different types of data and carry address information. Each envelope contains a header segment and a trailer segment. These segments separate the envelope from other envelopes and provide information about the contents of the envelope.

The three levels of envelopes are as follows:

### Interchange

*Interchange* is the outermost level of the envelope structure, and contains all the data sent from one sender to one receiver in the same transmission.

### Functional group

*Functional group* is the next level of envelope structure, and is contained inside the interchange. The functional group surrounds a group of transaction sets of the same type.

### Transaction set

*Transaction sets* are the final level of enveloping inside the functional group.

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## Transaction sets

*Transaction sets* represent the paper documents that EDI replaces. For example, a purchase order corresponds to a transaction set. The standards define each transaction set in terms of the segments and elements that make up the document, the order in which they appear, and the relationships among them. Transaction sets are known as “messages” in Europe.

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## Segments

*Segments* are like sentences, and they are equivalent to the records in your application file. In the structure of EDI, the segments are groups of data elements that combine to communicate useful data. For example, a single data element may contain the number “4.” Though meaningless by itself, in the proper place in a segment, “4” indicates quantity.

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## Elements

*Elements* are the smallest piece of usable information defined by the standards, including a quantity, unit price, or description. An individual element can have different meanings depending on context, and therefore are normally not considered to have useful meaning until they are combined into segments.

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# Introducing Gentran:Director for Windows

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## Overview

Gentran:Director for Windows is a combined system made up of data translation, process control, and communication. It is designed primarily for the translation and communication of EDI, and other similar types of data.

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## Process control

Through the process control system, you can integrate Gentran:Director with a wide variety of business applications. It acts as an extension of the application, rather than a cumbersome add-on.

Gentran:Director also operates in an unattended mode. Audit trails and message tracking enable you to know precisely where a message is in the process, at any time.

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## Gentran Director Service

Gentran:Director uses the Gentran Director Service, which controls the execution of communication and translation functions.

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## Database

The *database* is the Microsoft Access relational database that Gentran:Director uses to store system data. The database tables contain indicators that point to actual data located in the system data store. The system data store is the repository of all shared Gentran:Director data.

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## Director components

The four main components of the Gentran:Director user interface are listed in the following table:

Component	Description
<b>Electronic Commerce (EC) Manager</b>	A data management component that serves as a high-level navigation tool and document management tool. It contains many windows, browsers, and dialog boxes for viewing and maintaining documents, interchange, audit, reporting, process control, communications, and translation object information. The EC Manager also provides access to the Partner Editor and Document Editor.
<b>Partner Editor</b>	Allows you to define, edit, and delete all partner information for your company and for your trading partners.
<b>Document Editor</b>	A data entry tool that allows you to create, modify, and view documents.
<b>System Configuration</b>	Enables you to modify system-wide configuration parameters after Gentran:Director is installed, including the following: <ul style="list-style-type: none"> <li>■ System directories</li> <li>■ System import specifications</li> <li>■ Splitter options</li> <li>■ Users</li> <li>■ Stop and start the Gentran Director service</li> </ul>

## Additional components

### EDI message standards

The Integration components also allow you to access EDI message standards to use for creating new translation objects. The EDI message standards files can be accessed from Compact Disc (CD) or transferred to a hard drive on your machine.

The following table lists additional components that can be purchased. These components can be accessed through the EC Manager:

Component	Description
Application Integration	<p>Enables you to generate import, export, and document turnaround translation objects.</p> <p><b>Note</b></p> <p>When the Application Integration translation objects are registered with Gentran:Director and selected as part of a trading relationship, they allow you to do the following:</p> <ul style="list-style-type: none"> <li>■ Outbound mapping - translate your application files to EDI standard formats for documents that you send your partners.</li> <li>■ Inbound mapping - translate EDI standard formats to your application format for documents that you receive from your partners.</li> </ul>
Forms Integration	<p>Enables you to generate screen entry and print translation objects.</p> <p><b>Note</b></p> <p>When the Forms Integration translation objects are registered with Gentran:Director and selected as part of a trading relationship, they allow you to facilitate the keying and printing of EDI documents that you send or receive.</p>
Accum Tracking Extension	<p>Enables you to do the following:</p> <ul style="list-style-type: none"> <li>■ Define and maintain trackable items</li> <li>■ Maintain the associated counts</li> <li>■ Report on trackable items</li> </ul>
Transaction Data File (TDF) Integration	<p>Enables you to do the following:</p> <ul style="list-style-type: none"> <li>■ Create an import or export translation object so you can use TDF with Gentran:Director. TDF is a flat file representation of an EDI standard document.</li> <li>■ Print a detailed report of the TDF layout of any EDI standard.</li> </ul>

# Navigating Gentran:Director

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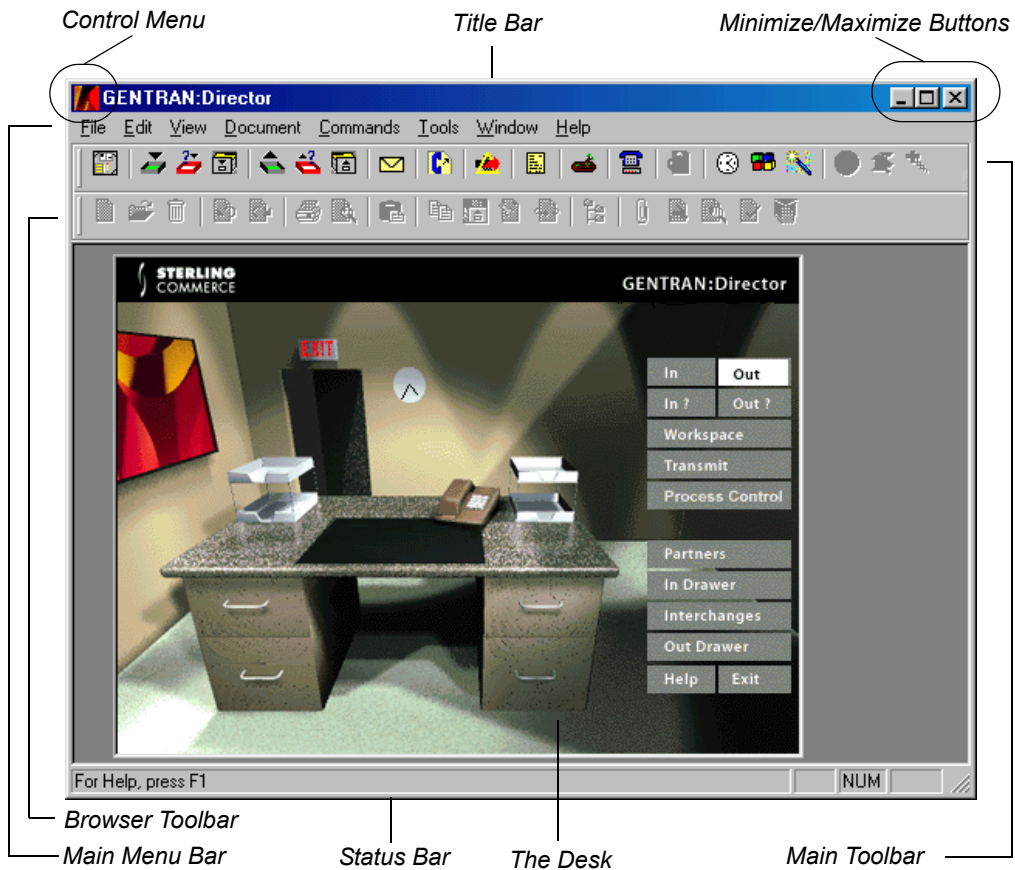
## Overview

You can access functionality on the Gentran:Director EC Manager window in the following ways:

- Clicking a menu option from the Main Menu Bar
  - Clicking a button on the Main Toolbar
  - Clicking a on the Browser Toolbar
  - Clicking a part of The Desk
  - Clicking a button within the chosen browser window
-

### Main window

The Gentran:Director EC Manager window is displayed as follows:





## Components

The main components of the Gentran:Director window include the following:

- Control menu
- Title bar
- Minimize and maximize buttons
- Main menu bar
- Main toolbar
- Browser toolbar
- The Desk
- Status bar

### Control menu

The *Control Menu* contains the following commands: **Restore**, **Move**, **Size**, **Minimize**, **Maximize**, and **Close**.

### Title bar

The *Title Bar* contains the name of the application. Clicking on the title bar and dragging allows you to move the Gentran:Director EC Manager window on your desktop.

### Minimize/Maximize buttons

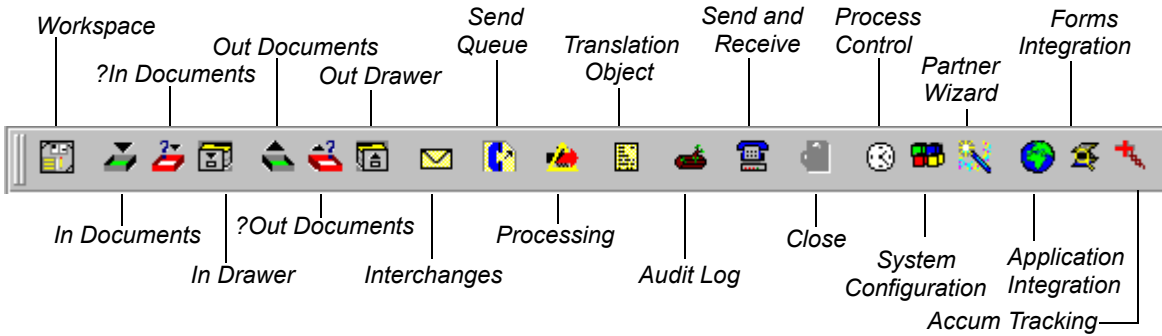
The *Minimize* button reduces the window to an icon. The *Maximize* button enlarges the window to its maximum size.

### Main menu bar

The *Main Menu Bar* contains the drop-down menus. Unavailable items are dimmed. For a detailed description of the commands contained in each menu, refer to the online Help.

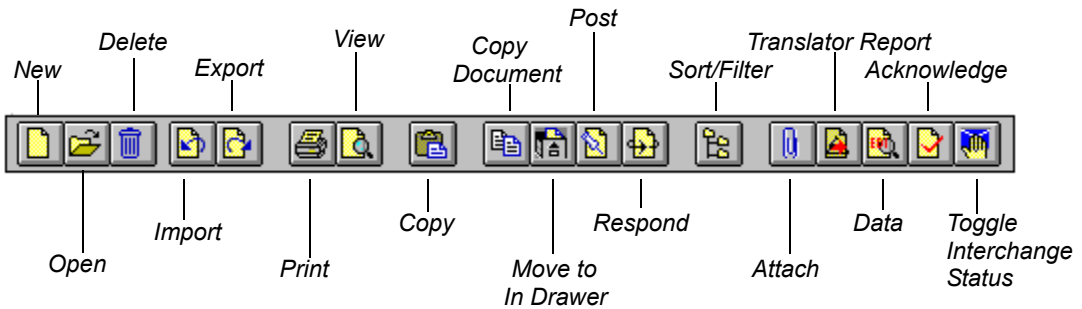
**Main toolbar**

The *Main Toolbar* provides access to some of the most common browsers and functions in Gentran:Director. Unavailable items are dimmed. The Main Toolbar is illustrated below:



**Browser toolbar**

The *Browser Toolbar* provides access to functions that are available from browsers in Gentran:Director. Unavailable items are dimmed. The Browser Toolbar is illustrated below:



## The Desk

*The Desk* is a graphical representation of the Gentran:Director components and document locations. It provides you with a quick and easy way to access some of the most commonly used browsers, functions, and subsystems of Gentran:Director. Click the appropriate part of The Desk any time you need to access a browser, function, or subsystem represented on The Desk.

Some of the browser icons display a graphical representation of paper if the document location contains documents. The Desk also allows you to access the Partner Editor subsystem, the online Help system, the Process Control function (clock icon), and the Send/Receive functions (phone icon). Click the Exit/Door icon to quit Gentran:Director.

## Status bar

The *Status Bar* does the following:

- Displays status information about a selection, command, or process.
  - Defines menu items as you highlight each item in the menu.
  - Indicates any current keyboard-initiated modes for typing. For example, CAP is used to represent the “Caps Lock” key, and NUM for the “Num Lock” key.
-



# *Using Translation Objects*

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## Overview

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### In this chapter

This chapter describes how to use translation objects with Gentran:Director.

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### Translation object definition

A translation object is a set of definitions, links, and rules that combine to provide the translator with all the information necessary to convert data from one format to another. Translation objects are used in Gentran:Director to control the processing of the translator subsystem.

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### Creating translation objects

Translation objects are created by compiling an application map or a form definition using the Application or Forms Integration subsystem in Gentran:Director. For more information, see the *Application Integration User's Guide* and *Forms Integration User's Guide*.

---

### Types of translation objects

There are two types of translation objects: system translation objects and user translation objects.

#### System translation objects

System translation objects control the creation and separation of interchanges, functional groups, and transaction sets. They are also used to generate and reconcile functional acknowledgments. All the required system translation objects are automatically installed with the Gentran:Director system.

#### User translation objects

User translation objects control screen entry, importing, exporting, and creating printed reports.

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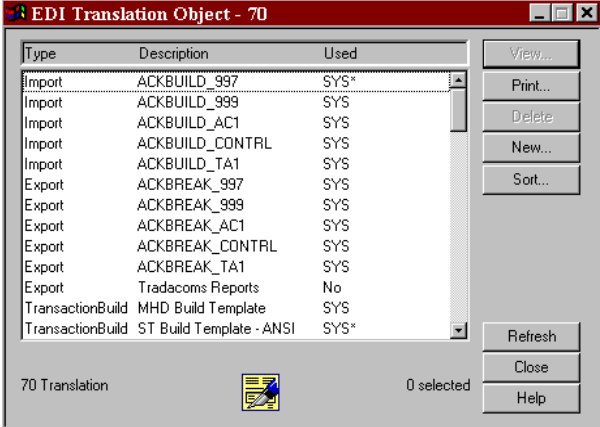
# Registering (Installing) a New Translation Object

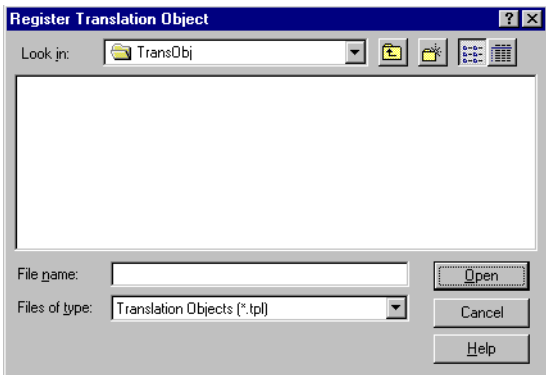
## Introduction

The Register Translation Object function enables you to register your translation object file with Gentran:Director so the system can use the translation object to translate data.

## Procedure

To register a translation object, complete the following steps:

Step	Action
1	<p>From the View menu, select TRANSLATION OBJECTS.</p> <p><b>System Response</b> The EDI Translation Objects browser is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

(Cont.) Step	Action
<p>2</p>	<p>Click NEW.</p> <p><b>System Response</b></p> <p>The Register Translation Object dialog box is displayed.</p> 
<p>3</p>	<p>Select the translation object file that you want to register with the system from the list, or type it in the File name box.</p> <p><b>Note</b></p> <p>To highlight a group of translation objects, click on the first translation object, press the <b>SHIFT</b> key, and then click on the last translation object in the group. To highlight several translation objects that are not adjacent to each other, press and hold the <b>CTRL</b> key while clicking on each translation object.</p>
<p>4</p>	<p>Click OPEN.</p> <p><b>System Response</b></p> <p>The translation object files are registered and the Register Translation Object dialog box is closed.</p> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>■ If the selected file is invalid, you receive a warning message. <i>Only</i> valid Gentran:Director translation object files can be installed.</li> <li>■ If the translation object is a duplicate, you are prompted with a message asking whether or not you want to overwrite the existing translation object.</li> </ul>



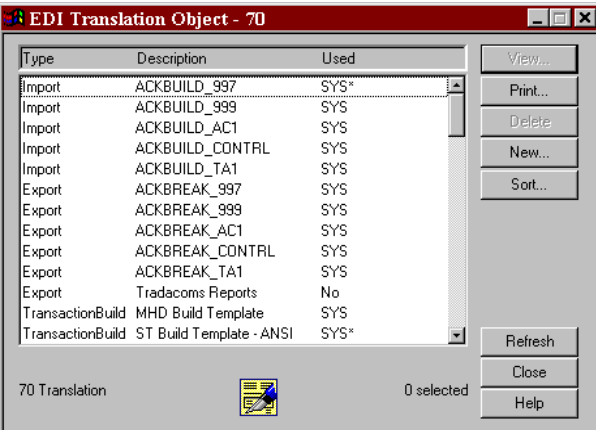
# Deleting Translation Objects

## Introduction

You can delete old or unused translation objects from the system only if they are not currently associated with an Inbound or Outbound Partner Relationship. Translations objects shown with “No” in the Used column are not associated. The system also prevents you from deleting translation objects that are designated as “system translation objects.” These are shown as “SYS\*” or “SYS.”

## Procedure

To delete a translation object, complete the following steps:

Step	Action
1	<p>From the View menu, select Translation Objects.</p> <p><b>System Response</b> The EDI Translation Objects browser is displayed.</p> 
2	Select the translation object or objects you want to delete.
3	<p>Click DELETE.</p> <p><b>System Response</b> The Delete confirmation dialog box is displayed.</p>
4	Click YES to confirm the deletion.

# Sorting Translation Objects

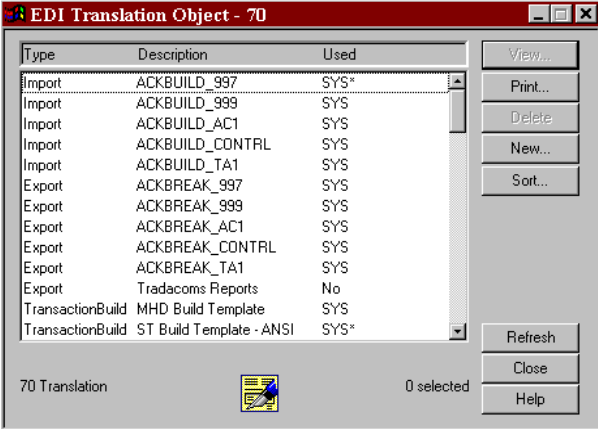
## Overview


You can use the Sort function on the EDI Translation Objects dialog box to arrange the columns of the translation objects into one of the following sequences:

- Group by Type - Sorts the translation objects alphabetically by type
- Sort by Description - Sorts the translation objects alphabetically by description

## Procedure

To sort translation objects, complete the following steps:

Step	Action
1	<p>From the View menu, select Translation Objects.</p> <p><b>System Response</b> The EDI Translation Objects browser is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
2	<p>Click SORT.</p> <p><b>System Response</b> The Sort Translation Objects dialog box is displayed.</p> 
3	Click the radio button for the appropriate sort order.
4	Deselect the Hide System Templates check box to display system translation objects. The system translation objects are hidden by default.
5	Click OK to sort the list of translation object(s) into the specified sort order.



# Maintaining Partner Relationships

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# Maintaining Partner Relationships

## Overview

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### In this chapter

This chapter describes the following tasks for creating and maintaining partner relationships:

- Defining partner defaults
- Using the Partner Wizard
- Setting up partner profiles
- Routing partner profiles
- Using partner tables
- Using partner locations

Partner relationships are based on how you and your trading partner exchange EDI data. *Gentran:Director* enables you to install custom data to simplify the process. To create partner relationships, two tools are provided: the Partner Wizard and Partner Editor.

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### Quick Partner

The Quick Partner function enables you to establish default values to be used when adding new partner profiles or relationships using the Partner Wizard or Partner Editor. This function significantly simplifies and quickens the creation of partner profiles and relationships.

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### Partner Wizard

The Partner Wizard is an easy-to-use method for adding new partners and new partner relationships to the system, and is designed for the novice EDI user. This tool walks you through the creation of new partner profiles, inbound relationships, and outbound relationships. Partner Wizard also automatically creates the appropriate acknowledgment for inbound and outbound documents.

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## Partner Editor

Partner relationships allow you to send and receive data to and from your trading partners. The Partner Editor allows you to define, edit, and delete all partner relationship information for your company and your trading partners.

The Partner Editor also allows you to use an internal system partner (<Internal System User>) to define your company to the system.

---

# Setting Up Partner Profiles

## Overview

### Introduction

You can set up your partner profiles by using one of three methods: importing, copying, or creating them yourself. The method you use depends on whether you have a partner profile to use as a starting point. Use the following table to decide which method to use:

Partner profile creation method	When to use
Import existing profile	<p>Use this method if you receive partner profiles from Sterling Commerce or if you have an existing profile from which you can import partner details. The profile can be exported from another copy of the Gentran:Director system.</p> <p><b>Reference</b> For more information, see <i>Importing a Partner Profile</i> on page 3 - 60.</p>
Copy existing profile	<p>Use this method when you have an existing profile that you can copy. You must then enter a unique partner definition and key enveloping information for the copied partner.</p> <p><b>Reference</b> For more information, see <i>Copying a Partner Profile</i> on page 3 - 65.</p>
Create a new profile	<p>Use this method when you do not have a profile to import or copy.</p> <p><b>Reference</b> For more information on how to create a new partner profile, see <i>Defining a partner profile</i> on page 3 - 6.</p>



## Partner definition

A partner profile begins with a *partner definition*. The partner definition contains the basic information about a partner that the system needs before you can define the rest of the partner profile.

### Note

You need to create a partner definition for each partner with whom you are going to exchange data.

---

## Partner profile

To complete the partner profile, you need to define an inbound or outbound relationship, or both.

- If you are receiving and processing information from this trading partner, you need to define an *inbound relationship*.
- If you are sending information to this trading partner, you need to define an *outbound relationship*.

### Note

You need to create a partner profile for each partner with whom you are going to exchange data.

---

## Defining a partner profile

The following table describes the process for creating a partner profile.

Stage	Description	
1	Define default values that will be used each time you create a new partner relationship. <b>Note</b> You define partner defaults <i>one time only</i> . <b>Reference</b> For more information, see <i>Using Quick Partner to Define Defaults</i> on page 3 - 7.	
2	Use this table to determine the next stage.	
	IF you need to...	THEN use...
	<ul style="list-style-type: none"> <li>■ create a basic partner definition</li> <li>■ create an inbound relationship</li> <li>■ create an outbound relationship</li> </ul>	the Partner Wizard <b>Reference</b> For more information, see <i>Using the Partner Wizard</i> on page 3 - 26.
<ul style="list-style-type: none"> <li>■ modify existing partner profiles</li> <li>■ modify existing partner relationships</li> <li>■ use partner tables</li> <li>■ use partner locations</li> <li>■ set up advanced options such as control numbers or acknowledgment options</li> </ul>	the Partner Editor <b>Reference</b> For more information, see the appropriate section: <ul style="list-style-type: none"> <li>■ <i>Editing or Deleting a Partner Definition</i> on page 3 - 57</li> <li>■ <i>Setting Up Partner Profiles</i> on page 3 - 4</li> <li>■ <i>Using Partner Locations</i> on page 3 - 86</li> </ul>	
3	Do you need to use a cross-reference or lookup table with the partner relationship in order to supplement or convert data entered or received inbound? <ul style="list-style-type: none"> <li>■ If <i>yes</i>, see <i>Creating a Table</i> on page 3 - 70 for more information.</li> <li>■ If <i>no</i>, continue with stage 4.</li> </ul>	
4	Do you need to use locations to contain address and contact-related information about the partner? <ul style="list-style-type: none"> <li>■ If <i>yes</i>, see <i>Creating Partner Locations</i> on page 3 - 87 for more information.</li> <li>■ If <i>no</i>, you have completed the partner profile definition process.</li> </ul>	

## Using Quick Partner to Define Defaults

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### Introduction

The Quick Partner function enables you to establish default values that are used when adding new partner profiles or relationships with the Partner Wizard. These values will not affect existing partner profiles or relationships.

### Recommendation

Use this function prior to setting up partner profiles and significantly simplify and quicken the creation of partner profiles and relationships.

---

### Quick Partner Defaults dialog box

There are three defaults sets of values you can establish with the Quick Partner Defaults dialog box:

- *Sender ID* enables you to set up default sender ID values for outbound data.
- *Inbound* enables you to set up default values for inbound relationships.
- *Outbound* enables you to set up default values for outbound relationships.

You can complete default values for any one of these sections, or for all three.

---

### Accessing the dialog box

To access the Quick Partner Defaults dialog box:

1. From the Tools menu, select Partner Editor.
2. Click DEFAULTS.

The Quick Partner Defaults dialog box is displayed.



### Parts and functions

The following table lists the parts of the Quick Partner Defaults dialog box and their functions:

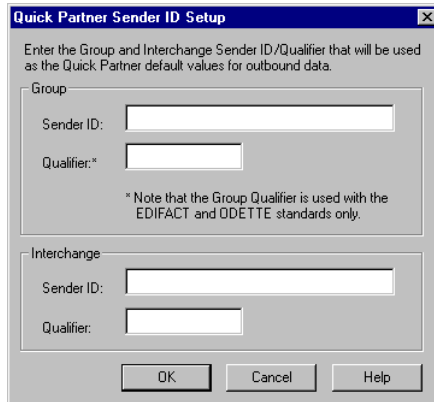
Part	Function
SENDER ID	Accesses the Quick Partner Sender ID Setup dialog box.
INBOUND	Accesses the Quick Partner Inbound Defaults dialog box.
OUTBOUND	Accesses the Quick Partner Outbound Defaults dialog box.
CLOSE	Exits the Quick Partner Defaults dialog box.

## Sender ID Setup dialog box

The Quick Partner Sender ID Setup dialog box enables you to set up default sender ID values for outbound data.

### Accessing the dialog box

From the Quick Partner Defaults dialog box, click SENDER ID. The Quick Partner Sender ID Setup dialog box is displayed.



### Parts and functions

The following table lists the parts of the Quick Partner Sender ID Setup dialog box and their functions:

Part	Function
Group Sender ID	Identifies your company in outgoing groups (as defined by the standards).
Group Qualifier	Qualifies the group Sender ID (as defined by the standards).  <b>Note</b> Used with EDIFACT and ODETTE standards only.
Interchange Sender ID	The value that identifies your company in outgoing interchanges (as defined by the standards).  <i>Continued on next page</i>

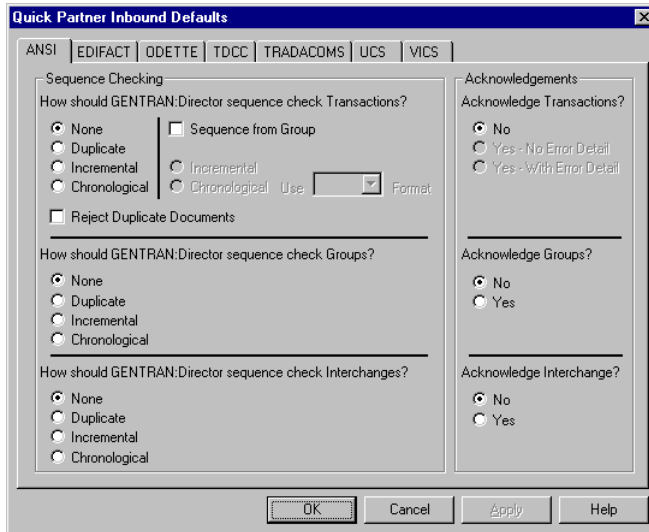
Part	Function
Interchange Qualifier	Qualifies the interchange Sender ID (as defined by the standards).
OK	Saves the values and closes the Sender ID Setup dialog box.
CANCEL	Closes the Sender ID Setup dialog box without saving values.
HELP	Accesses context-sensitive help on the Sender ID Setup dialog box.

### Inbound Defaults dialog box

The Quick Partner Inbound Defaults dialog box enables you to set up default values for inbound relationships.

#### Accessing the dialog box

From the Quick Partner Defaults dialog box, click INBOUND. The Quick Partner Inbound Defaults dialog box is displayed.



**Parts and functions**

The Quick Partner Inbound Defaults dialog box has a tab for each EDI standard. The options that are available on each tab are determined by the EDI standard. If an option is unavailable, it is not required by that standard.

The following table lists the parts of the Quick Partner Inbound Defaults dialog box and their functions:

<b>Part</b>	<b>Function</b>
Transaction Sequence Checking option	<p>Instructs the system whether to expect a functional acknowledgment from your trading partner.</p> <p><b>Note</b> When you are setting up sequence checking options, note that if the system detects duplicate control numbers, or detects incremental or chronological control numbers that are out of sequence, those documents are located in ?In Documents.</p> <p><b>Values</b></p> <ul style="list-style-type: none"> <li>■ <b>None</b> - Sequence checking will not be used.</li> <li>■ <b>Duplicate</b> - Check for duplicate control numbers.</li> <li>■ <b>Incremental</b> -The control number must be one greater than the last number.</li> <li>■ <b>Chronological</b> - The control number must be greater than the last number.</li> </ul> <p><b>Note</b> These options are disabled if Sequence From Group is selected.</p>
Sequence from Group	<p>Indicates whether the transaction set control numbering options for this group setup should be controlled at the group level.</p>
Incremental or Chronological option	<p>Specifies how you want sequence checking to be used.</p> <p><b>Values</b></p> <ul style="list-style-type: none"> <li>■ <b>Incremental</b> - The control number must be one greater than the last number.</li> <li>■ <b>Chronological</b> - The control number must be greater than the last number.</li> </ul> <p><b>Note</b> These options are disabled if Sequence from Group is not selected.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Part</b>	<b>Function</b>
Format	<p>Indicates the format of the transaction set control number that the system will generate.</p> <p><b>Values</b></p> <p><b>Normal</b> The number is generated by incrementing the last used control number. The length of the number is defined by the standard.</p> <p><b>6/3</b> The number is a composite of two numbers. The first six digits are the last six digits of the functional group control number. The last three digits are a counter beginning at “1” within the functional group. <i>Use this format only as instructed by your trading partner.</i></p> <p><b>5/4</b> The number is a composite of two numbers. The first five digits are the last five digits of the functional group control number. The last four digits are a counter beginning at “1” within the functional group. <i>This is the normal TDCC numbering convention. It is used by the Motor, Rail, and Ocean transportation industries.</i></p> <p><b>5/3</b> The number is a composite of two numbers. The first five digits are the last five digits of the functional group control number. The last three digits are a counter beginning at “1” within the functional group. <i>This is the normal UCS convention, which is used by the Grocery and Warehousing industries.</i></p> <p><b>Note</b> This list is disabled if Sequence from Group is not selected.</p>
Reject Duplicate Documents	<p>Instructs the system to check for duplicate document names, and then reject those documents.</p>
Group Sequence Checking option	<p>Indicates how the system should sequence check groups.</p> <p><b>Values</b></p> <ul style="list-style-type: none"> <li>■ <b>None</b> - Sequence checking will not be used.</li> <li>■ <b>Duplicate</b> - Check for duplicate control numbers.</li> <li>■ <b>Incremental</b> -The control number must be one greater than the last number.</li> <li>■ <b>Chronological</b> -The control number must be greater than the last number.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>



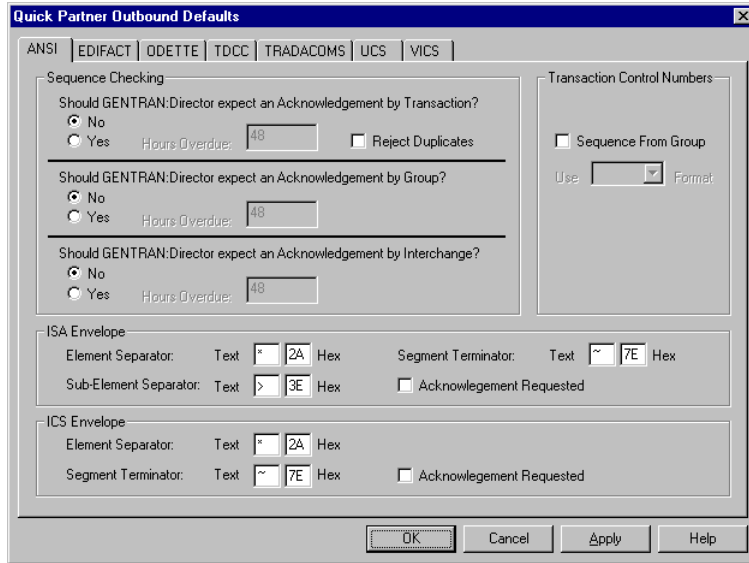
<b>(Cont.) Part</b>	<b>Function</b>
Transaction Sequence Checking option	<p>Indicates how the system should sequence check interchanges.</p> <p><b>Values</b></p> <ul style="list-style-type: none"> <li>■ <b>None</b> - Sequence checking will not be used.</li> <li>■ <b>Duplicate</b> - Check for duplicate control numbers.</li> <li>■ <b>Incremental</b> - The control number must be one greater than the last number.</li> <li>■ <b>Chronological</b> - The control number must be greater than the last number.</li> </ul>
Acknowledge Transactions option	<p>Instructs the system to generate a functional acknowledgment to this trading partner when you receive the transaction set defined in this relationship.</p> <p><b>Values</b></p> <ul style="list-style-type: none"> <li>■ <b>No</b> - Do NOT generate acknowledgments</li> <li>■ <b>Yes - No Error Detail</b> - Generate acknowledgments without error detail</li> <li>■ <b>Yes - With Error Detail</b> - Generate acknowledgments with error detail</li> </ul>
Acknowledge Group option	<p>Instructs the system to generate a functional acknowledgment to this trading partner when you receive the group defined in this relationship.</p>
Acknowledge Interchange option	<p>Instructs the system to generate a functional acknowledgment to this trading partner when you receive the interchange defined in this relationship.</p>
OK	<p>Saves the values and exits the Inbound Defaults dialog box.</p>
CANCEL	<p>Exits the Inbound Defaults dialog box without saving values.</p>
HELP	<p>Accesses context-sensitive help on the Inbound Defaults dialog box.</p>

## Outbound Defaults dialog box

The Quick Partner Outbound Defaults dialog box enables you to set up default values for Outbound relationships.

### Accessing the dialog box

From the Quick Partner Defaults dialog box, click OUTBOUND. The Quick Partner Outbound Defaults dialog box is displayed.



### Parts and functions

The Quick Partner Outbound Defaults dialog box has a tab for each EDI standard. The options available on each tab are determined by the EDI standard. If an option is unavailable, it is not required by that standard.

The following table lists the parts of the Quick Partner Outbound Defaults dialog box and their functions:

Part	Function
Transaction Acknowledgment option	Instructs the system to expect an acknowledgment from your trading partner when they receive the transaction set defined for the relationship.
Hours Overdue (transaction)	Defines how many hours must elapse before the expected acknowledgment is considered overdue.  <b>Note</b> The default value for the Hours Overdue box is “48”, indicating that the acknowledgment is considered overdue in two days. If you enter a value of “0” (zero), the acknowledgment is immediately considered overdue.
Reject Duplicates	Instructs the system to check for duplicate document names, and then reject those documents.
Group Acknowledgment option	Instructs the system to expect an acknowledgment from your trading partner when they receive the group defined for the relationship.
Hours Overdue (group)	Defines how many hours must elapse before the expected acknowledgment is considered overdue.
Interchange Acknowledgment option	Instructs the system to expect an acknowledgment from your trading partner when they receive the interchange defined for the relationship.
Hours Overdue (interchange)	Defines how many hours must elapse before the expected acknowledgment is considered overdue.
Sequence From Group	Instructs the system to manage transaction set control numbering options at the group level.  <div style="text-align: right;"><i>Continued on next page</i></div>

<b>(Cont.) Part</b>	<b>Function</b>
Format	<p>Defines the format of the transaction set control number that the system generates.</p> <p><b>Values</b></p> <p><b>Normal</b> The number is generated by incrementing the last used control number. The length of the number is defined by the standard.</p> <p><b>6/3</b> The number is a composite of two numbers. The first six digits are the last six digits of the functional group control number. The last three digits are a counter beginning at “1” within the functional group. <i>Use this format only as instructed by your trading partner.</i></p> <p><b>5/4</b> The number is a composite of two numbers. The first five digits are the last five digits of the functional group control number. The last four digits are a counter beginning at “1” within the functional group. <i>This is the normal TDCC numbering convention. It is used by the Motor, Rail, and Ocean transportation industries.</i></p> <p><b>5/3</b> The number is a composite of two numbers. The first five digits are the last five digits of the functional group control number. The last three digits are a counter beginning at “1” within the functional group. <i>This is the normal UCS convention, which is used by the Grocery and Warehousing industries.</i></p>
OK	Saves the values and closes the Outbound Defaults dialog box.
CANCEL	Closes the Outbound Defaults dialog box without saving values.
HELP	Accesses context-sensitive help on the Outbound Defaults dialog box.

**Envelope definitions**

If you set defaults for an outbound relationship, you also need to specify enveloping defaults. The envelope you use depends on the EDI standard. The following table lists the EDI standards and their corresponding envelope options.

<b>EDI Standard</b>	<b>Envelope you use</b>
ANSI	ISA or ICS
EDIFACT	UNA
ODETTE	UNA
TDCC	ISA or BG
TRADACOMS	SCH
UCS	ISA or BG
VICS	ISA or ICS

---

## Envelope options

The envelope options that you must specify depend on which envelope you are using. The following table defines *all* Gentran:Director envelope options. Refer to the table when completing the envelope information for outbound relationships.

Envelope option	Definition
Element Separator	<p>Defines the value that separates elements in an outbound data segment. This box is mandatory. The value <b>MUST</b> be between HEX “01” and HEX “FF”.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>■ In the first box, type the special character (*, ^, etc.). The system converts and enters the hex value for that character in the second box.</li> <li>■ In the second box, type the hex value. The system converts and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box is blank.</li> </ul>
Sub-Element Separator	<p>Defines the value that will separate the parts of an outbound element. This box is mandatory and the value <b>MUST</b> be between HEX “01” and HEX “FF”.</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>■ In the first box, type the special character (*, ^, etc.). The system converts and enters the hex value for that character in the second box.</li> <li>■ In the second box, type the hex value. The system converts and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box is blank.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Envelope option</b>	<b>Definition</b>
Segment Terminator	<p>Defines the value that identifies the end of an outbound data segment. This box is mandatory. The value MUST be between HEX "01" and HEX "FF".</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>■ In the first box, type a special character. The system converts and enters the hex value for that character in the second box.</li> <li>■ In the second box, type the hex value. The system converts and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box is blank.</li> </ul>
Acknowledgment Requested	Instructs the system to require an acknowledgment for the outbound interchange.
Send UNA Segment	Instructs the system to send the UNA segment.
Component Element Separator	<p>Defines the value that separates the parts of an outbound element. This box is mandatory. The value MUST be between HEX "01" and HEX "FF".</p> <p>Do one of the following:</p> <ul style="list-style-type: none"> <li>■ In the first box, type the special character. The system converts and enters the hex value for that character in the second box.</li> <li>■ In the second box, type the hex value. The system converts and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box is blank.</li> </ul>
Decimal Notation	<p>Defines either a comma (";") or a period (".") to indicate the decimal point in a numeric box. This box is mandatory.</p> <p><b>Recommendation</b> The character (".") is recommended.</p>
Release Indicator	Defines a character that restores any character, used as a syntactical separator, to its original meaning. This box is mandatory.
Send SCH Segment	<p>When selected, the system sends the SCH segment.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

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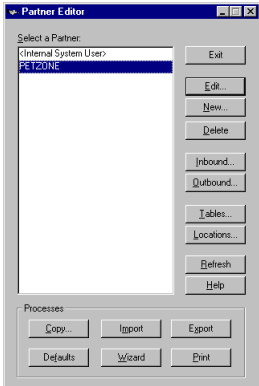
<b>(Cont.) Envelope option</b>	<b>Definition</b>
Sender ID Name	Defines your name as it will appear on the interchange header segment sent to this Trading Partner.
Segment Code Separator	<p>Defines the value that separates segment codes. This box is mandatory. The value MUST be between HEX "01" and HEX "FF".</p> <p>Do one of the following:</p> <ul style="list-style-type: none"><li>■ In the first box, type the special character. The system will convert and enter the hex value for that character in the second box.</li><li>■ In the second box, type the hex value, and the system will convert and enter the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box is blank.</li></ul>

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**Procedure**

To use Quick Partner to define defaults, complete the following steps:

Step	Action
<b>Accessing Quick Partner</b>	
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<p>Click DEFAULTS.</p> <p><b>System Response</b> The Quick Partner Default dialog box is displayed.</p>
<b>Setting default values for sender IDs</b>	
1	<p>Click SENDER ID.</p> <p><b>System Response</b> The Quick Partner Sender ID Setup dialog box is displayed.</p>
2	<p>Complete the Group and Interchange Sender ID and Qualifier information.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	Click OK.  <b>System Response</b> The sender ID information is saved and the Quick Partner ID Setup dialog box is closed.
<b>Setting default values for inbound relationships</b>	
1	Click INBOUND.  <b>System Response</b> The Quick Partner Inbound Defaults dialog box is displayed.
2	Select the tab for the EDI standard you are using to establish inbound partner relationships.  <b>Note</b> The options that are available on each tab are determined by the EDI standard. If an options is unavailable, it is not required by that standard.
3	Do you want to control transaction set control numbering options at the group level? <ul style="list-style-type: none"> <li>■ If <i>yes</i>, continue with steps 5 through 7.</li> <li>■ If <i>no</i>, continue with step 4.</li> </ul>
4	In the Sequence Checking section, select an option to indicate whether the system should expect a functional acknowledgment from your trading partner. Continue with step 8.
5	Select Sequence from Group to indicate whether the transaction set control numbering options for this group setup should be controlled at the group level. Continue with step 6.
6	Select the sequence checking option that specifies how sequence checking should be used. Continue with step 7.
7	<ul style="list-style-type: none"> <li>■ From the list in the Sequence Checking section, select the format of the transaction set control number that the system generates. Continue with step 8.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
8	<p>Do you want the system to check for duplicate document names and reject those documents?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, select the Duplicate Documents check box and continue with step 9.</li> <li>■ If <i>no</i>, continue with step 9.</li> </ul>
9	<ul style="list-style-type: none"> <li>■ In the Sequence Checking section, select how the system should sequence check groups. Continue with step 10.</li> </ul>
10	<ul style="list-style-type: none"> <li>■ In the Sequence Checking section, select how the system should sequence check interchanges. Continue with step 11.</li> </ul>
11	<p>Do you want the system to generate a functional acknowledgment to this trading partner when you receive the transaction set defined for this relationship?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, in the Acknowledgments section, select the appropriate transaction set option and continue with step 12.</li> <li>■ If <i>no</i>, continue with step 12.</li> </ul>
12	<p>Do you want the system to generate a functional acknowledgment to this trading partner when you receive the group defined in this relationship?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, in the Acknowledgments section, select the Yes option and continue with step 13.</li> <li>■ If <i>no</i>, continue with step 13.</li> </ul>
13	<p>Do you want the system to generate a functional acknowledgment to this trading partner when you receive the interchange defined in this relationship?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, in the Acknowledgments section, select the Yes option and continue with step 14.</li> <li>■ If <i>no</i>, continue with step 14.</li> </ul>
14	<p>Do you have additional EDI standards you need to define?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, repeat steps 2 through 13 for each additional EDI standard you are using to define relationships.</li> <li>■ If <i>no</i>, click OK to save the inbound relationship information and exit the Quick Partner Inbound Defaults dialog box.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
<b>Setting default values for outbound relationships</b>	
1	Click OUTBOUND.  <b>System Response</b> The Quick Partner Outbound Defaults dialog box is displayed.
2	Select the tab for the EDI standard you are using to establish outbound partner relationships.
3	Do you want the system to expect an acknowledgment from your trading partner when they receive the transaction set defined in this relationship? <ul style="list-style-type: none"> <li>■ If <i>yes</i>, in the Sequence Checking section:               <ol style="list-style-type: none"> <li>a. Select the Yes option.</li> <li>b. Type how many hours must elapse before the expected acknowledgment is considered overdue.</li> <li>c. Continue with step 4.</li> </ol> </li> <li>■ If <i>no</i>, continue with step 4.</li> </ul>
4	Do you want the system to check for duplicate document names and reject those documents? <ul style="list-style-type: none"> <li>■ If <i>yes</i>, select the Duplicate Documents check box and continue with step 5.</li> <li>■ If <i>no</i>, continue with step 5.</li> </ul> <b>Note</b> When you are setting up duplicate document options, the system places any duplicate control numbers that it detects in ?In Documents.
5	Do you want the system to expect an acknowledgment from your trading partner when they receive the group defined in this relationship? <ul style="list-style-type: none"> <li>■ If <i>yes</i>, in the Sequence Checking section, select the Yes option and continue with step 6.</li> <li>■ If <i>no</i>, continue with step 6.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
6	<p>Do you want the system to expect an acknowledgment from your trading partner when they receive the interchange defined in this relationship?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, in the Sequence Checking section, select the Yes option and continue with step 7.</li> <li>■ If <i>no</i>, continue with step 7.</li> </ul>
7	<p>Do you want to manage transaction set control numbering options at the group level?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, complete the following:               <ol style="list-style-type: none"> <li>a. Select Sequence from Group.</li> <li>b. From the list in the Transaction Control Numbers section, select the format of the transaction set control number that the system generates.</li> <li>c. Continue with step 8.</li> </ol> </li> <li>■ If <i>no</i>, continue with step 8.</li> </ul>
8	<ul style="list-style-type: none"> <li>■ Complete the appropriate envelope information, and continue with step 9.</li> </ul> <p><b>Reference</b> For information about envelope definitions, refer to <i>Envelope options</i> on page 3 - 18.</p>
9	<ul style="list-style-type: none"> <li>■ Repeat steps 2 through 8 for each additional EDI standard you are using to define relationships.</li> <li>■ Click OK to save the inbound relationship information and exit the Quick Partner Outbound Defaults dialog box.</li> </ul>
<b>Saving Quick Partner Defaults</b>	
1	<p>Click CLOSE on the Quick Partner Defaults dialog box to exit Quick Partner.</p> <p><b>Note</b> The established default is used by the system when you create a new partner profile/relationship using the Partner Wizard.</p>

## Using the Partner Wizard

---

### Introduction

The Partner Wizard is an easy-to-use method for adding new partners and new partner relationships to the system, and is designed for the novice EDI user. The Partner Wizard walks you through the creation of new partner definitions and profiles, inbound relationships, and outbound relationships. This tool also automatically creates the acknowledgment for inbound and outbound documents.

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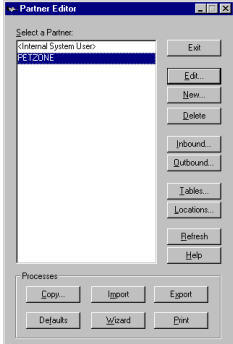
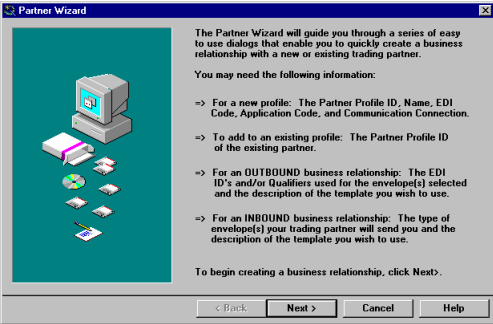
### Before you begin

Before using Partner Wizard to create a new partner, you must have the following information:

- The EDI code for the partner.
  - The application code used to identify the partner in the import file. This application code is needed *only* if the transactions are processed using the file Import facility.
  - The communication profile name you use to communicate with the partner.
-

**Procedure**

To use the Partner Wizard, complete the following steps:

Step	Action
<p>1</p>	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
<p>2</p>	<p>Click WIZARD.</p> <p><b>System Response</b> The Partner Wizard dialog box is displayed.</p> 
<p>3</p>	<p>Click NEXT&gt;.</p> <p><b>System Response</b> The Partner Wizard leads you through the necessary steps to create a new partner profile or partner relationship.</p>

# Creating a New Partner Definition

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## Introduction

The partner definition contains the basic information about the partner that the system needs before you can define the rest of the partner profile.

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## Before you begin

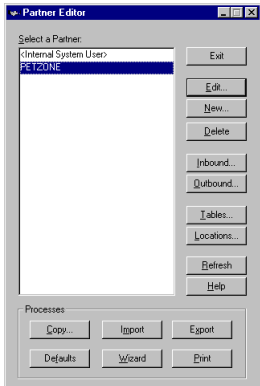
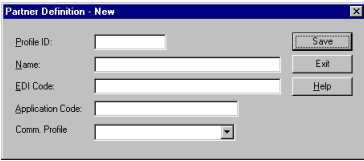
Before setting up a new partner definition, you must have the following information:

- The communication profile name you use to communicate with this partner.
  - The EDI code for this partner.
  - The application code used to identify this partner in the import file. This application code is needed *only* if the transactions are processed using the file Import facility.
-



**Procedure**

To create a new partner definition, complete the following steps:

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<p>Click NEW.</p> <p><b>System Response</b> The Partner Definition - New dialog box is displayed.</p> 
3	<p>In the Profile ID box, type a unique alphanumeric Profile ID for this partner.</p> <p><b>Note</b> Do not use special characters.</p>
4	<p>In the Name box, type the partner name.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
5	<p>In the EDI Code box, type the EDI identifier for this partner.</p> <p><b>Note</b> The system uses the EDI identifier during inbound processing, to select the correct partner.</p>
6	<p>If necessary, in the Application Code box, type an application code to identify this partner.</p> <p><b>Note</b> The system uses this identifier during outbound import processing to select the correct partner.</p>
7	<p>From the Comm. Profile list, select the predefined communications setup that you are using for inbound and outbound processing.</p>
8	<p>Click SAVE.</p>
9	<p>Click EXIT.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> <p><b>Note</b> To complete the partner profile you need to define an inbound or outbound relationship, or both.</p> <ul style="list-style-type: none"> <li>■ If you are receiving and processing information from this trading partner, you need to define an appropriate inbound relationship. For more information, see <i>Creating a New Inbound Relationship</i> on page 3 - 31.</li> <li>■ If you are sending information to this trading partner, you need to define an outbound relationship. For more information, see <i>Creating a New Outbound Relationship</i> on page 3 - 43.</li> </ul>

# Creating a New Inbound Relationship

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## Introduction

To correctly receive and process information from a trading partner, you must have an inbound relationship established that defines the parameters for receiving data files. Each inbound relationship defines which business documents are received from a partner.

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## Required parameters

Parameters are required when you create an inbound relationship. These parameters provide the system with the following information:

- The type of data which is received.
- The criteria the system uses to validate the information it receives.
- The functional groups and interchanges in which you expect to receive the documents.

---

## Translation objects

Each inbound relationship must have one or more associated inbound translation objects. These translation objects determine how the received data is processed. You need to specify which translation objects are used to define the rules for exporting, printing, and creating turnaround documents. At a minimum, one translation object must be available.

### Note

If this relationship requires a new translation object, you *must* register that translation object with the system before creating the inbound relationship. For instructions on how to register translation objects, See *Registering (Installing) a New Translation Object* on page 2 - 3.

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## Inbound groups and interchanges

You must define or select an inbound interchange and/or inbound functional group before the system allows you to complete the setup of an inbound relationship. The inbound functional group defines the format of the functional group and the parameters that are used to verify it. The inbound interchange defines the format of the interchange and the parameters that are used to verify it.

However, for some transactions, the functional group or interchange is optional. If your trading partner has chosen not to use it, then it is not necessary for you to select one. Refer to the standards discussed below to determine whether or not you are required to select an inbound functional group or interchange.

- For some **ANSI X12** documents, the interchange is optional and the functional group is *required*. However, for most documents, both an interchange and functional group are required.
- For **TDCC**, the interchange is optional and the functional group is *required*.
- For **UCS**, the interchange is *required* and the functional group is also *required*.
- For **EDIFACT**, the interchange is *required* and the functional group is optional.
- For **ODETTE**, the interchange is *required* and the functional group is optional.
- For **TRADACOMS**, the Interchange is *required* and there is no functional group.

### Note

If you do not want to use an optional functional group or interchange, you must select <none> from the appropriate dialog box to alert the system that you are not using a group.

---

**Before you begin**

Before setting up an inbound relationship, you must have the following information:

- The EDI standard that you expect from this trading partner. For example, ANSI.
  - The standard version that you expect from this trading partner. For example, 003020 for ANSI or 090001 for EDIFACT.
  - The code for the transaction set you expect from this trading partner. For example, “INVOIC” represents an EDIFACT invoice.
  - The type of functional group and interchange the transaction set is wrapped in when it is received from this partner.
- 

**Inbound  
relationship  
dialog box**

After you complete your implementation planning for this partner, you can set up the inbound relationship by using the Inbound Relationship dialog box. The Inbound Relationship dialog box controls other subordinate dialog boxes, which are used to define everything that is necessary to establish the relationship.

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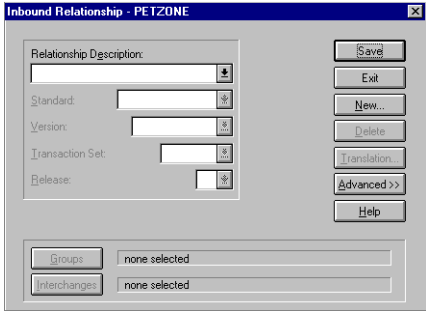
## Defining an inbound relationship

The process used to define an inbound relationship is explained in the following table:

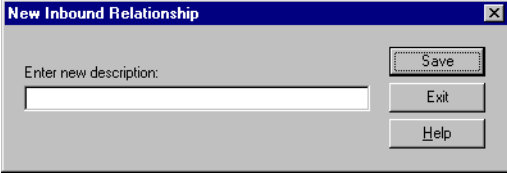
Stage	Description
1	Create a new inbound relationship. For more information, see page 3 - 35.
2	Select at least one inbound translation object.
3	<p>Create and select at least one inbound group to define how the document is received from this partner.</p> <p><b>Note</b></p> <p>Depending on the standards you are using, either the functional group or interchange may be optional. To determine what is optional for the standard you are using, see <i>Inbound groups and interchanges</i> on page 3 - 32.</p>
4	<p>Create and select at least one inbound interchange to define how the document is received from this partner.</p> <p><b>Note</b></p> <p>Depending on the standards you are using, either the functional group or interchange may be optional. To determine what is optional for the standard you are using, see <i>Inbound groups and interchanges</i> on page 3 - 32.</p>
5	<p>If you are generating functional acknowledgments as a result of receiving documents for an inbound relationship, you must set up the corresponding outbound relationship to generate the acknowledgments your partner requests.</p> <p><b>Reference</b></p> <p>For information about establishing an outbound relationship, see <i>Creating a New Outbound Relationship</i> on page 3 - 43.</p>

**Procedure**

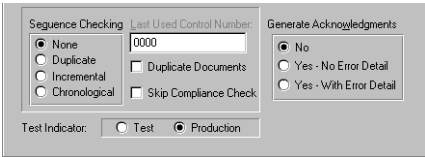
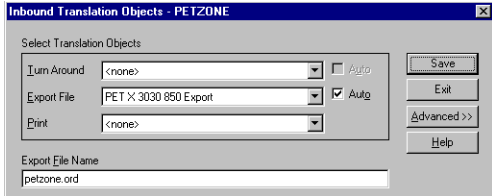
To create an inbound relationship, complete the following steps:

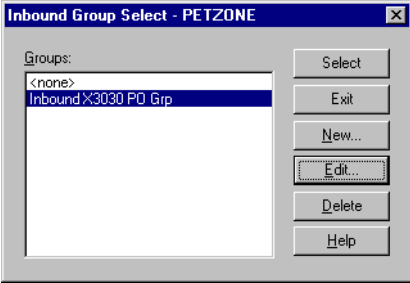
Step	Action
<b>Creating a new inbound relationship</b>	
1	From the Tools menu, select Partner Editor. <b>System Response</b> The Partner Editor dialog box is displayed.
2	<ul style="list-style-type: none"> <li>■ Select the partner profile for which you want to create an inbound relationship.</li> <li>■ Click INBOUND.</li> </ul> <b>System Response</b> The Inbound Relationship dialog box is displayed. <div style="text-align: center; margin: 10px 0;">  </div> <b>Note</b> You must have already created a partner definition for this partner. For more information, see <i>Creating a New Partner Definition</i> on page 3 - 28.

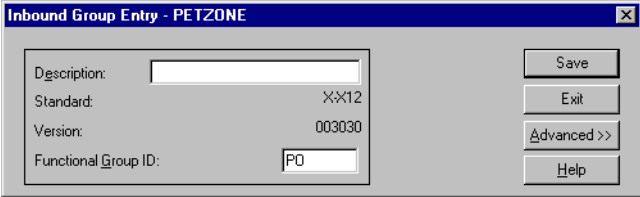
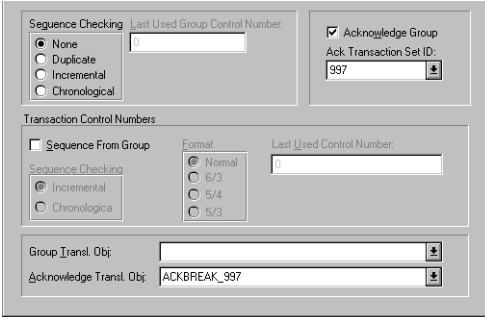
*Continued on next page*

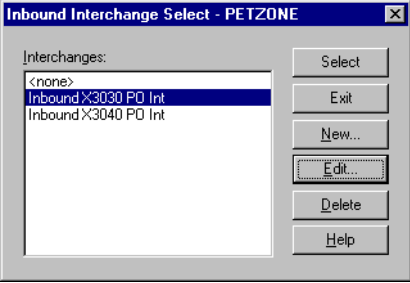
<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click NEW.</p> <p><b>System Response</b> The New Inbound Relationship dialog box is displayed.</p> 
4	<p>In the description box, type a unique relationship name. For example, Inbound Invoice.</p>
5	<p>Click SAVE.</p> <p><b>System Response</b> A new inbound relationship is created and the Inbound Relationship dialog box is displayed.</p>
6	<p>From the appropriate lists on the Inbound Relationship dialog box, select the following:</p> <ul style="list-style-type: none"> <li>■ Standard</li> <li>■ Version</li> <li>■ Transaction Set</li> <li>■ Release -- select for TRADACOMS only</li> </ul> <p><b>Note</b> The information required for this dialog box should be provided to you by your trading partner when they define the details of the transactions they send to you.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

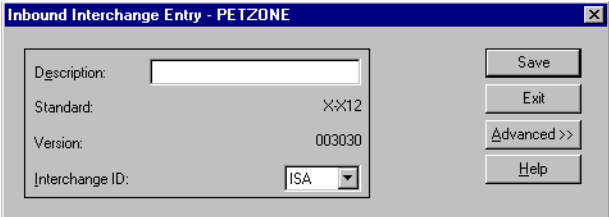
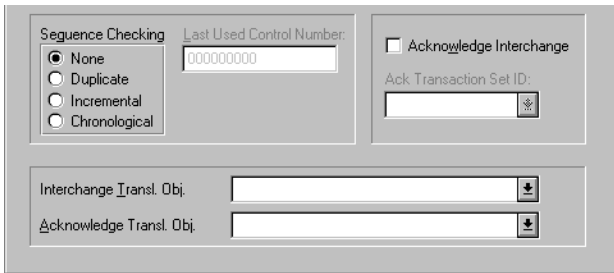


<b>(Cont.) Step</b>	<b>Action</b>
7	<p>Click <b>ADVANCED&gt;&gt;</b> to define parameters that comply with the processing needs of your partner. These parameters include Sequence Checking, Last Used Control, Duplicate Documents, or Generate Acknowledgment.</p> <p><b>System Response</b> The Inbound Relationship dialog box is extended.</p> 
<b>Selecting an inbound translation object</b>	
1	<p>On the Inbound Relationship dialog box, click <b>TRANSLATION</b>.</p> <p><b>System Response</b> The Inbound Translation Object dialog box is displayed.</p> 
2	<p>From the lists, select the translation objects that are required for this inbound relationship.</p> <p><b>Note</b> The lists display all the translation objects registered in the system that are appropriate for the type of translation object, such as Export or Print, and the transaction set.</p> <p>If there are no translation objects displayed in the lists, no translation objects are registered for the document defined in the relationship.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>If you selected an Export File translation object and you want to export to a specific file, type the mapped path of that file in the Export File Name box.</p> <p><b>Note</b> Do not use Universal Naming Convention (UNC) paths.</p>
4	<p>Click SAVE.</p> <p><b>System Response</b> Your selections are saved and the Inbound Relationship dialog box is displayed.</p>
<b>Selecting an inbound functional group</b>	
1	<p>On the Inbound Relationship dialog box, click GROUPS to display a list of existing groups.</p> <p><b>System Response</b> The Inbound Group Select dialog box is displayed.</p> 
2	<p>Is the required group in the Groups list?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, select the group and click SELECT. Select &lt;none&gt; if you are not using groups. Continue with the <i>Selecting an inbound interchange</i> section of this table.</li> </ul> <p><b>System Response</b> The highlighted group is selected and the Inbound Relationship dialog box is displayed.</p> <ul style="list-style-type: none"> <li>■ If <i>no</i>, continue with step 3 to create the group.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>On the Inbound Group Select dialog box, click NEW.</p> <p><b>System Response</b> The Inbound Group Entry dialog box is displayed.</p> 
4	<p>In the Description box, type the group description.</p>
5	<p>In the Functional Group ID box, type the identification of the functional group you are specifying.</p> <p><b>Note</b> The EDI standards define which functional group ID should be used for each type of document.</p>
6	<p>If you have more complex requirements for processing the functional group, click ADVANCED&gt;&gt; to display the full list of functional group setup options.</p> <p><b>System Response</b> The Inbound Group Entry dialog box is extended.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
7	<p>After you set up the required parameters in this dialog box, click <b>SAVE</b>.</p> <p><b>System Response</b> The information is stored and the Inbound Group Select dialog box is displayed.</p>
8	<ul style="list-style-type: none"> <li>■ Highlight the new group.</li> <li>■ Click <b>SELECT</b>.</li> </ul> <p><b>System Response</b> The group is selected and the Inbound Relationship dialog box is displayed.</p>
<b>Selecting an inbound interchange</b>	
1	<p>On the Inbound Relationship dialog box, click <b>INTERCHANGES</b>.</p> <p><b>System Response</b> The Inbound Interchange Select dialog box is displayed, showing a list of existing interchanges.</p> 
2	<p>Is the required interchange in the Interchanges list?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, select the interchange and click <b>SELECT</b>. Select <i>&lt;none&gt;</i> if you are not using groups. Continue with the <i>Finalizing the inbound relationship</i> section of this table.</li> </ul> <p><b>System Response</b> The highlighted interchange is selected and the Inbound Relationship dialog box is displayed.</p> <ul style="list-style-type: none"> <li>■ If <i>no</i>, continue with step 3 to create the interchange.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>On the Inbound Interchange Select dialog box, click NEW.</p> <p><b>System Response</b> The Inbound Interchange Entry dialog box is displayed.</p> 
4	<p>In the Description box, type the interchange description.</p>
5	<p>In the Interchange ID box, type the identification of the interchange you are specifying.</p> <p><b>Note</b> The EDI standards define which interchange ID should be used for each type of document.</p>
6	<p>If you have more complex requirements for processing the interchange, click ADVANCED&gt;&gt; to display the full list of interchange setup options.</p> <p><b>System Response</b> The Inbound Interchange Entry dialog box is extended.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
7	<p>After you set up the required parameters in this dialog box, click <b>SAVE</b>.</p> <p><b>System Response</b> The information is stored and the Inbound Interchange Select dialog box is displayed.</p>
8	<ul style="list-style-type: none"> <li>■ Highlight the new interchange.</li> <li>■ Click <b>SELECT</b>.</li> </ul> <p><b>System Response</b> The interchange is selected and the Inbound Relationship dialog box is displayed.</p>
<b>Finalizing the inbound relationship</b>	
1	On the Inbound Relationship dialog box, click <b>SAVE</b> .
2	<p>Click <b>EXIT</b>.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>

# Creating a New Outbound Relationship

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## Introduction

To correctly send information to a trading partner, you need to define an outbound relationship. Outbound relationships define the parameters needed to send a data file to a trading partner. Each outbound relationship defines the format of a single business document, and how that business document is formatted and sent to the specified trading partner.

---

## Required parameters

Parameters are required when you create an outbound relationship. These parameters provide the system with the following information:

- How to create the required message.
- The criteria that the system uses to validate the information entered.
- How to create the functional group and interchange envelopes in preparation for sending.

---

## Translation objects

Each outbound relationship must have one or more associated outbound translation objects. These translation objects determine how the sent data is formatted. You need to specify which translation objects are used to define the rules for screen entry or file import. At a minimum, one translation object must be available.

### Note

If this relationship requires a new translation object, you *must* register that translation object with the system before creating the outbound relationship. For instructions on how to register translation objects, see *Registering (Installing) a New Translation Object* on page 2 - 3.

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## Outbound groups and interchanges

You must define or select an outbound interchange and/or outbound functional group before the system allows you to complete the setup of an outbound relationship. The outbound functional group defines the format of the functional group and the parameters that should be used to verify it. The outbound interchange defines the format of the interchange and the parameters that should be used to verify it.

For some transactions, the functional group or interchange is optional. If your trading partner has chosen not to use it, then it is not necessary for you to select one. Refer to the standards discussed below to determine whether or not you are required to select an outbound functional group or interchange.

- For some **ANSI X12** documents, the interchange is optional and the functional group is *required*. However, for most documents, both an interchange and functional group are required.
- For **TDCC**, the interchange is optional and the functional group is *required*.
- For **UCS**, the interchange is *required* and the functional group is also *required*.
- For **EDIFACT**, the interchange is *required* and the functional group is optional.
- For **ODETTE**, the interchange is *required* and the functional group is optional.
- For **TRADACOMS**, the Interchange is *required* and there is no functional group.

### Note

If you do not want to use an optional functional group or interchange, select <none> from the appropriate dialog box to alert the system that you are not using a group.

---



## Before you begin

Before setting up an outbound relationship, you must have the following information:

- The EDI standard that this trading partner expects. For example, ANSI X12.
  - The standard version that this partner expects. For example, 003020 for ANSI or 090001 for EDIFACT.
  - The code for the transaction set you use. For example, “INVOIC” represents an EDIFACT invoice.
  - The type of functional group and interchange envelope the transaction set is wrapped in when it is sent to this partner.
- 

## Outbound relationship dialog box

After you complete your implementation planning for this partner, you can set up the outbound relationship by using the Outbound Relationship dialog box. The Outbound Relationship dialog box controls other subordinate dialog boxes, where you define everything that is necessary to establish the relationship.

---

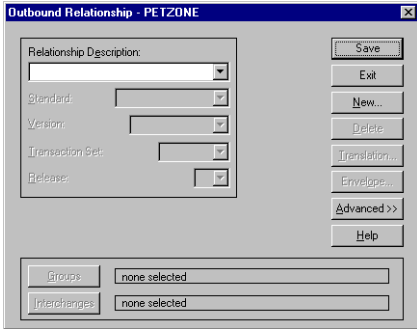
## Defining an outbound relationship

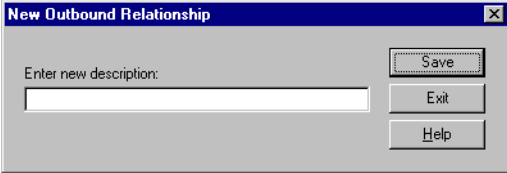
The process you use when defining an outbound relationship is explained in the following table:

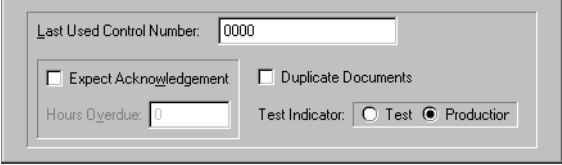
Stage	Description
1	Create a new outbound relationship. For more information, see page 3 - 47.
2	If you are using the EDIFACT, ODETTE, or TRADACOMS standard, you must complete the envelope (header) information for this type of document.
3	Select at least one outbound translation object.
4	<p>Create and select at least one outbound group (including enveloping information) to define how the document is received from this partner.</p> <p><b>Note</b></p> <p>Depending on the standards you are using, either the functional group or interchange may be optional. To determine what is optional for the standard you are using, see <i>Outbound groups and interchanges</i> on page 3 - 44.</p>
5	<p>Create and select at least one outbound interchange (including enveloping information) to define how the document is received from this partner.</p> <p><b>Note</b></p> <p>Depending on the standards you are using, either the functional group or interchange may be optional. To determine what is optional for the standard you are using, see <i>Outbound groups and interchanges</i> on page 3 - 44.</p>
6	<p>If you are receiving functional acknowledgments as a result of sending documents for an outbound relationship, part of establishing that outbound relationship is setting up the corresponding inbound relationship to receive the acknowledgments from your partner.</p> <p><b>Reference</b></p> <p>For information on how to establish an inbound relationship, see <i>Creating a New Inbound Relationship</i> on page 3 - 31.</p>

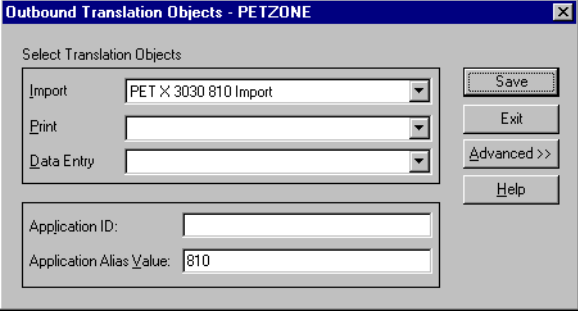
**Procedure**

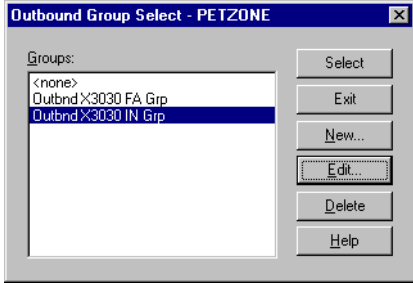
To create an outbound relationship, complete the following steps:

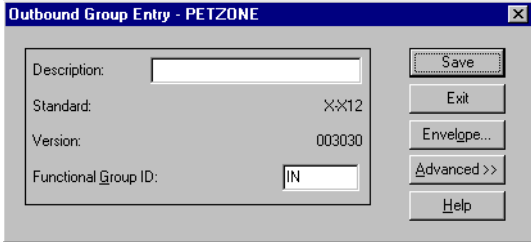
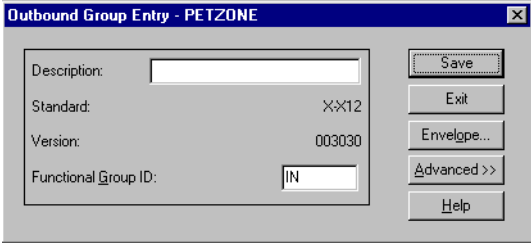
Step	Action
<b>Creating a new outbound relationship</b>	
1	From the Tools menu, select Partner Editor. <b>System Response</b> The Partner Editor dialog box is displayed.
2	<ul style="list-style-type: none"> <li>■ Select the partner profile for which you want to create an outbound relationship.</li> <li>■ Click OUTBOUND.</li> </ul> <b>System Response</b> The Outbound Relationship dialog box is displayed. <div style="text-align: center; margin: 10px 0;">  </div> <b>Note</b> You must have already created a partner definition for this partner. For more information, see <i>Creating a New Partner Definition</i> on page 3 - 28. <p style="text-align: right; margin-top: 20px;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click NEW.</p> <p><b>System Response</b> The New Outbound Relationship dialog box is displayed.</p> 
4	<p>In the description box, type a unique relationship name.</p>
5	<p>Click SAVE.</p> <p><b>System Response</b> A new outbound relationship is created and the Outbound Relationship dialog box is displayed.</p>
6	<p>From the appropriate lists on the Outbound Relationship dialog box, select the following:</p> <ul style="list-style-type: none"> <li>■ Standard</li> <li>■ Version</li> <li>■ Transaction Set</li> <li>■ Release -- select for TRADACOMS only</li> </ul> <p><b>Note</b> The information required for this dialog box should be provided to you by your trading partner when they define the details of the transactions they send to you.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
7	<p>Click <b>ADVANCED&gt;&gt;</b> if you need to define parameters that comply with the processing needs of your partner. These parameters include Last Used Control Number, Expect Acknowledgment, Hours Overdue, Duplicate Documents, or Test Indicator.</p> <p><b>System Response</b> The Outbound Relationship dialog box is extended.</p> 
<p><b>Selecting a transaction envelope (EDIFACT, ODETTE, and TRADACOMS standards only)</b></p>	
1	<p>If you are using the EDIFACT, ODETTE, or TRADACOMS standard, click <b>ENVELOPE</b> to complete the envelope (header) information.</p> <p><b>System Response</b> One of the following dialog boxes is displayed:</p> <ul style="list-style-type: none"> <li>■ Outbound UNH Envelope dialog box</li> <li>■ Outbound MHD Envelope dialog box</li> </ul>
2	<ul style="list-style-type: none"> <li>■ Enter the appropriate information.</li> <li>■ Click <b>SAVE</b>.</li> </ul> <p><b>System Response</b> The information is saved and the Outbound Relationship dialog box is displayed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

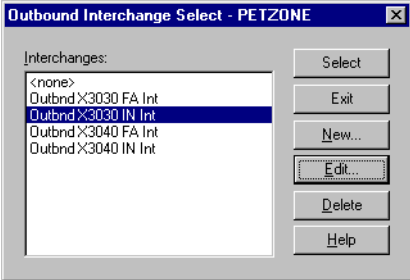
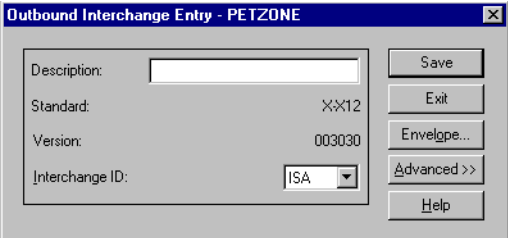
<b>(Cont.) Step</b>	<b>Action</b>
<b>Selecting an outbound translation object</b>	
<p>1</p>	<p>On the Outbound Relationship dialog box, click TRANSLATION.</p> <p><b>System Response</b> The Outbound Translation Object dialog box is displayed.</p> 
<p>2</p>	<p>From the lists, select the translation objects that are required for this outbound relationship.</p> <p><b>Note</b> The lists display all translation objects registered in the system that are appropriate for the type of translation object, such as Import or Print, and the transaction set.</p> <p>If there are no translation objects displayed in the lists, no translation objects of that type are registered for the document defined in the relationship.</p>
<p>3</p>	<p>If you selected an Import translation object, you may need to define the following:</p> <ul style="list-style-type: none"> <li>■ In the Application ID box, type the application identifier that indicates the destination for the documents.</li> <li>■ In the Application Alias Value box, type criteria that the system uses to distinguish this relationship from others during the application import function.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
4	<p>Click SAVE.</p> <p><b>System Response</b></p> <p>The selections are saved and the Outbound Relationship dialog box is displayed.</p>
<b>Selecting an outbound functional group</b>	
1	<p>On the Outbound Relationship dialog box, click GROUPS.</p> <p><b>System Response</b></p> <p>The Outbound Group Select dialog box is displayed, showing a list of existing groups.</p> 
2	<p>Is the required group in the Groups list?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, select the group, and click SELECT. Select &lt;none&gt; if you are not using groups. Continue with the <i>Selecting an outbound interchange</i> section of this table.</li> </ul> <p><b>System Response</b></p> <p>The highlighted group is selected and the Outbound Relationship dialog box is displayed.</p> <ul style="list-style-type: none"> <li>■ If <i>no</i>, continue with step 3 to create the group.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>On the Outbound Group Select dialog box, click NEW.</p> <p><b>System Response</b> The Outbound Group Entry dialog box is displayed.</p> 
4	<p>In the Description box, type the group description.</p>
5	<p>In the Functional Group ID box, type the identification of the functional group you are specifying.</p> <p><b>Note</b> The EDI standards define which functional group ID should be used for each type of document.</p>
6	<p>If you have more complex requirements for processing the functional group, click ADVANCED&gt;&gt; to display the full list of functional group setup options.</p> <p><b>System Response</b> The Outbound Group Entry dialog box is displayed.</p>  <p><b>Recommendation</b> Do <i>not</i> change the translation objects in the Group Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason to do so.</p> <p style="text-align: right;"><i>Continued on next page</i></p>



<b>(Cont.) Step</b>	<b>Action</b>
7	<p>Click ENVELOPE to set up the parameters for the generation of the Functional Group segment.</p> <p><b>System Response</b></p> <p>The Outbound Functional Group dialog box that is displayed is determined by the standard selected on the Outbound Relationship dialog box. It is one of the following:</p> <ul style="list-style-type: none"> <li>■ Outbound GS Functional Group</li> <li>■ Outbound UNG Functional Group</li> <li>■ Outbound BAT Functional Group</li> </ul>
8	<p>After you set up the required parameters in the enveloping dialog box, click SAVE.</p> <p><b>System Response</b></p> <p>The information is stored and the Outbound Group Entry dialog box is displayed.</p>
9	<p>Click SAVE.</p> <p><b>System Response</b></p> <p>The information on the Outbound Group Entry dialog box is stored and the Outbound Group Select dialog box is displayed.</p>
10	<ul style="list-style-type: none"> <li>■ Highlight the new group.</li> <li>■ Click SELECT.</li> </ul> <p><b>System Response</b></p> <p>The group is selected and the Outbound Relationship dialog box is displayed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
<b>Selecting an outbound interchange</b>	
<p>1</p>	<p>On the Outbound Relationship dialog box, click INTERCHANGES.</p> <p><b>System Response</b></p> <p>The Outbound Interchange Select dialog box is displayed, showing a list of existing interchanges.</p> 
<p>2</p>	<p>Is the required interchange in the Interchanges list?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, select the interchange and click SELECT. Select &lt;none&gt; if you are not using groups. Continue with the <i>Finalizing the outbound relationship</i> section of this table.</li> <li>■ If <i>no</i>, continue with step 3 to create the interchange.</li> </ul> <p><b>System Response</b></p> <p>The highlighted interchange is selected and the Outbound Relationship dialog is displayed.</p>
<p>3</p>	<p>On the Outbound Interchange Select dialog box, click NEW.</p> <p><b>System Response</b></p> <p>The Outbound Interchange Entry dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
4	In the Description box, type the interchange description.
5	<p>In the Interchange ID box, type the identification of the interchange you are specifying.</p> <p><b>Note</b> The EDI standards define which interchange ID should be used for each type of document.</p>
6	<p>If you have more complex requirements for processing the interchange, click <b>ADVANCED&gt;&gt;</b> to display the full list of interchange setup options.</p> <p><b>System Response</b> The Outbound Interchange Entry dialog box is extended.</p> <div data-bbox="584 716 1060 1003" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p><input type="checkbox"/> Set Max Number of Documents per Interchange Max Number of Documents per Interchange: <input type="text" value="0"/></p> <p>Last Used Control Number: <input type="text" value="000000000"/>      <input type="checkbox"/> Expect Acknowledgement Hours Overdue: <input type="text" value="0"/></p> <p>Interchange Transl. Obj.: <input type="text" value="ISA Build Template - ANSI"/> ▼</p> <p>Acknowledge Transl. Obj.: <input type="text" value=""/> ▼</p> </div> <p><b>Recommendation</b> Do <i>not</i> change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason to do so.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
7	<p>Click ENVELOPE to set up parameters for generating the interchange segment.</p> <p><b>System Response</b> The Outbound Interchange dialog box that is displayed, is determined by the standard you selected on the Outbound Relationship dialog box. It is one of the following:</p> <ul style="list-style-type: none"> <li>■ Outbound ISA Envelope</li> <li>■ Outbound ICS Envelope</li> <li>■ Outbound BG Envelope</li> <li>■ Outbound UNB Envelope</li> <li>■ Outbound UNA Envelope</li> <li>■ Outbound STX Envelope</li> </ul>
8	<p>After you set up the required parameters in the enveloping dialog box, click SAVE.</p> <p><b>System Response</b> The information is stored and the Outbound Interchange Entry dialog box is displayed.</p>
9	<p>Click SAVE.</p> <p><b>System Response</b> The information on the Outbound Interchange Entry dialog box is stored and the Outbound Interchange Select dialog box is displayed.</p>
10	<p>Highlight the new interchange and click SELECT.</p> <p><b>System Response</b> The interchange is selected and the Outbound Relationship dialog box is displayed.</p>
<b>Finalizing the outbound relationship</b>	
1	<p>On the Outbound Relationship dialog box, click SAVE.</p>
2	<p>Click EXIT.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>

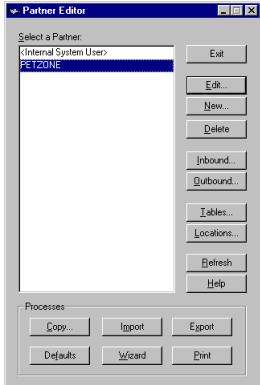
# Editing or Deleting a Partner Definition

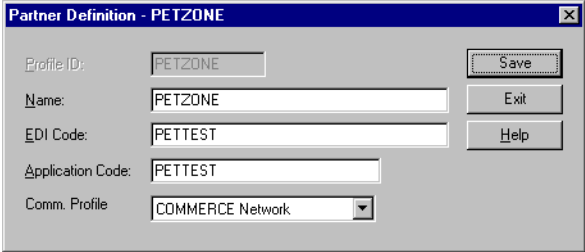
## Introduction

The partner definition contains the basic profile information about that partner to which the system associates the rest of that partner’s records. You can edit or delete the partner definition from the Partner Editor dialog box.

## Editing a partner profile

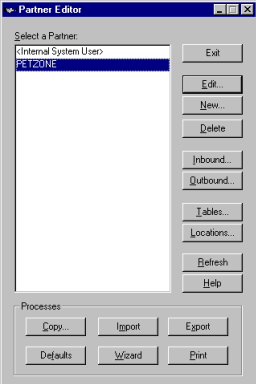
To edit a partner profile, complete the following steps:

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
<p>2</p>	<ul style="list-style-type: none"> <li>■ Select the appropriate partner from the Select a Partner list.</li> <li>■ Click EDIT.</li> </ul> <p><b>System Response</b></p> <p>The Partner Definition dialog box is displayed for that partner.</p> 
<p>3</p>	<p>Make the necessary changes and click SAVE.</p> <p><b>System Response</b></p> <p>The Partner Editor dialog box is displayed.</p> <p><b>Note</b></p> <p>You can also edit other aspects of a partner relationship by clicking the appropriate button on the Partner Editor dialog box. For example, if you want to edit an inbound or outbound relationship, click INBOUND or OUTBOUND.</p> <p>You are not able to edit any boxes that are unavailable; these are the “keys” to the relationship. In this case, you must create a new inbound or outbound relationship for that partner.</p> <p><b>Reference</b></p> <ul style="list-style-type: none"> <li>■ For more information on creating a new inbound relationship, see <i>Creating a New Inbound Relationship</i> on page 3 - 31.</li> <li>■ For more information on creating a new outbound relationship, see <i>Creating a New Outbound Relationship</i> on page 3 - 43.</li> </ul>

## Deleting a partner profile

To delete a partner profile, complete the following steps:

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<ul style="list-style-type: none"> <li>■ Select the appropriate partner from the Select a Partner list.</li> <li>■ Click DELETE.</li> </ul> <p><b>System Response</b> You are prompted to confirm the deletion.</p> <p><b>Caution</b> When you delete a partner relationship, the documents and interchanges associated with that partner are also deleted. You are warned before the actual deletion.</p>
3	<p>Click YES to delete the selected partner profile.</p> <p><b>System Response</b> The partner profile and all associated records are deleted.</p>

# Routing Partner Profiles

## Importing a Partner Profile

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### Introduction

The partner profile defines the parameters that control the processing and structure of inbound and outbound data. As a result, the partner profiles may become complex and may require you to define a significant number of parameters.

To simplify this process, Gentran:Director includes the import partner feature, which enables you to import partner details from a file. The file of partner details can originate from a partner profile that was exported from another copy of the Gentran:Director system.

You can also use the import facility to update information for existing partners. If you import to an existing partner profile, you can add new trading relationships. Existing relationships are not modified.

#### Note

Any tables attached to the partner profile, such as cross-reference, lookup, or location, are also imported.

---

### Before you begin

You must register any translation objects required for the partner before loading a partner profile. Only those profiles for which one or more of the necessary translation objects are available is imported. Any relationships in the import file that are not loaded can be imported once you obtain and register the translation objects.

#### Reference

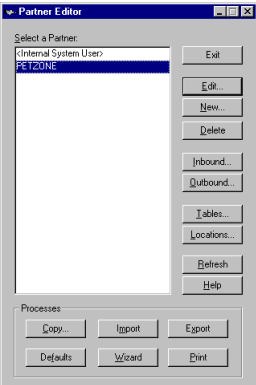
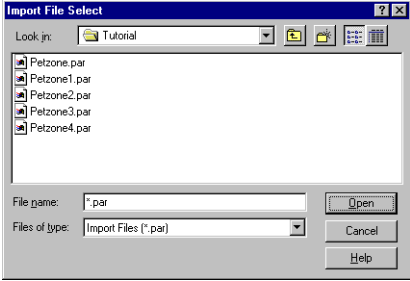
For more information on registering translation objects, see *Registering (Installing) a New Translation Object* on page 2 - 3.

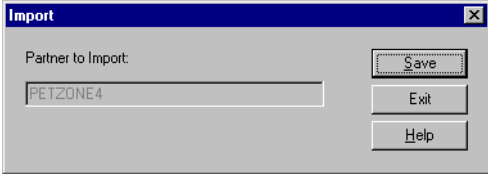
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**Procedure**

To import a partner profile, complete the following steps:

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<p>Click IMPORT.</p> <p><b>System Response</b> The Import File Select dialog box is displayed.</p> 
3	<p>Select the location of the partner file by doing one of the following:</p> <ul style="list-style-type: none"> <li>■ Selecting it from the Look in list</li> <li>■ Typing it in the File name box</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
4	<p>Click OPEN.</p> <p><b>System Response</b> The Import dialog box is displayed. This dialog box allows you verify that this partner is the correct one.</p> 
5	Click SAVE to continue.
6	<p>If you are prompted to enter additional partner information, enter that information and click SAVE.</p> <p><b>System Response</b> The system imports the partner details if they do not already exist on the system, and any relationships for which there are translation objects.</p> <p>During this process, the system prompts you for any additional information it needs by displaying the appropriate Partner Editor dialog box. You are prompted with dialog boxes when you would normally be required to provide information about your site. This is usually restricted to your EDI identifiers which the system uses to generate outbound EDI envelopes. The system continues displaying Partner Editor dialog boxes until it has all the information it needs.</p> <p>Once the import is complete, the system displays the message "Import process completed. Note any warnings or errors."</p>
7	<p>Click OK.</p> <p><b>System Response</b> The Import dialog box is displayed.</p>
8	<p>Click EXIT.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>

# Exporting a Partner Profile

## Introduction

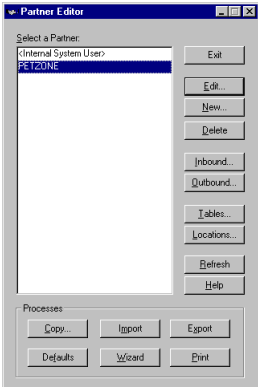
Gentran:Director includes a feature that enables you to export existing partner details to a file. You can also export your partners to diskette to use as a backup of your partner system.

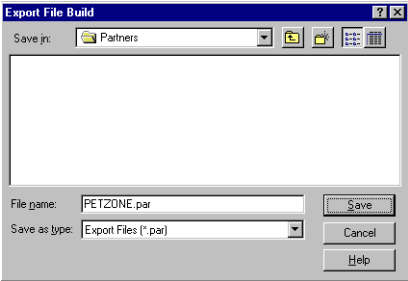
### Note

Any tables attached to the partner profile, such as cross-reference, lookup, or location, are also exported.

## Procedure

To export a partner profile, complete the following steps:

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
2	<ul style="list-style-type: none"> <li>■ Select a partner.</li> <li>■ Click EXPORT.</li> </ul> <p><b>System Response</b></p> <p>The Export File Build dialog box is displayed.</p> 
3	<p>Name the export file by doing one of the following:</p> <ul style="list-style-type: none"> <li>■ Selecting it from the Look in list</li> <li>■ Typing it in the File name box</li> </ul> <p><b>Note</b></p> <p>The system automatically prompts you to name the export file with the name of the partner and the .PAR extension.</p>
4	<p>Click SAVE.</p> <p><b>System Response</b></p> <p>The partner is exported.</p>

# Copying a Partner Profile

---

## Introduction

The partner copy function enables you to select a partner profile to copy. This means that you do not need to type in similar partner profiles from scratch. Instead, you can copy from an existing profile, enter unique partner definition, and key enveloping information for the copied partner.

The partner copy function is designed to provide you with a quick method for establishing partners that, generally, have similar or identical trading relationships.

### Note

You must export the partner profile before you copy it. If you do not know which EDI standard that partner profile uses, check the profile information before you export and copy it.

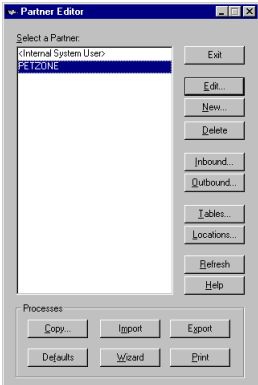
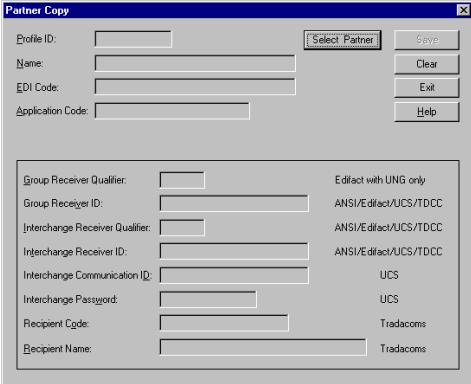
### Reference

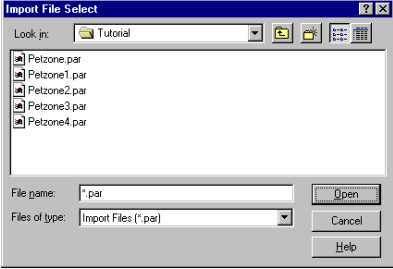
For more information, see *Exporting a Partner Profile* on page 3 - 63.

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**Procedure**

To copy a partner profile, complete the following steps:

Step	Action
<p>1</p>	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
<p>2</p>	<p>Click COPY.</p> <p><b>System Response</b> The Partner Copy dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click SELECT PARTNER.</p> <p><b>System Response</b></p> <p>The Import File Select dialog box is displayed.</p> 
4	<p>Select the file you want to copy by doing one of the following:</p> <ul style="list-style-type: none"> <li>■ Selecting it from the Look in list</li> <li>■ Typing it in the File name box</li> </ul>
5	<p>Click OPEN to copy that partner.</p> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>■ The model partner profile name is displayed in the title bar of the Partner Copy dialog box.</li> <li>■ The default file extension for exported partners is “.PAR.”</li> </ul>
6	<p>On the Partner Copy dialog box Profile ID box, type a unique profile identifier.</p>
7	<p>In the Name box, type the partner name.</p>
8	<p>In the EDI Code box, type the EDI identifier for this partner.</p> <p><b>Note</b></p> <p>The system uses the EDI identifier during inbound processing to select the correct partner.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
9	<p>If necessary, in the Application Code box, type an application code to identify this partner.</p> <p><b>Note</b> The system uses this identifier during outbound import processing to select the correct partner.</p>
10	<p>Complete the appropriate boxes in the enveloping section of the dialog box.</p> <p><b>Note</b> You should only complete those boxes that are necessary for the standard used by the partner profile you copied. The standards are listed to the right of each box.</p> <p>If the partner profile you copied uses a standard, you must complete all the necessary enveloping boxes for that standard. If you do <i>not</i> complete the necessary boxes for the standard, the system takes the necessary information from the copied partner profile envelope.</p> <p><b>Example</b> If the copied partner profile uses the UCS standard, you must complete the Interchange Communication ID box, among others.</p>
11	After you enter all the partner information, click <b>SAVE</b> .
12	<p>Click <b>EXIT</b>.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>



---

# Setting up Partner Tables

## Overview

---

---

### Introduction

The translation process allows you to set up tables to use information in the Partner database when a document is entered into the system, either from a file or from the Document Editor facility.

---

### Table use

The Partner Editor also allows you to use an internal system partner (<Internal System User>) to define your company to the system. Tables can be set up for use with either a trading partner or with the special system partner.

- Tables that you establish under a specific partner are valid only for that partner.
- Tables that you set up under the internal system user can be used globally.

---

### Using tables

The use of partner or system partner tables is defined in the translation objects at design time. This allows commonly used items such as names and addresses to be inserted into the outbound data without the need to type it. It also allows you to use Lookup and Cross-reference tables to supplement or convert data you enter or receive inbound.

You can create cross-reference and lookup tables in *Gentran:Director*, or you can import and export existing tables to and from your system.

#### Note

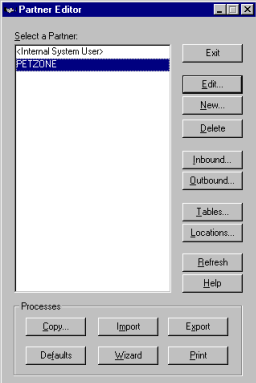
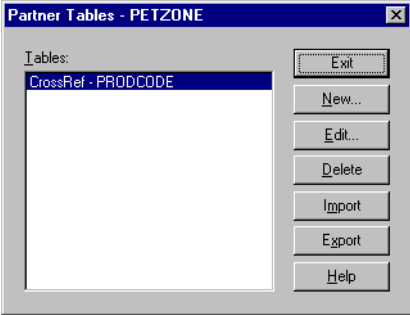
Tables are used only if you create a translation object that specifically accesses those tables.

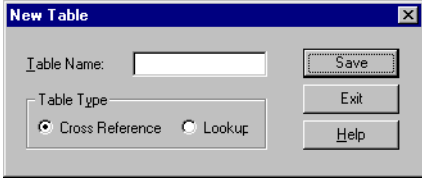
---

# Creating a Table

## Procedure

To create a partner table, complete the following steps:

Step	Action
<p>1</p>	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
<p>2</p>	<ul style="list-style-type: none"> <li>■ Select the partner profile or the system partner (&lt;Internal System User&gt;) for which you want to create a Cross-reference or Lookup table.</li> <li>■ Click TABLES.</li> </ul> <p>The Partner Tables dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click NEW.</p> <p><b>System Response</b> The New Table dialog box is displayed.</p> 
4	<p>In the Table Name box, type the unique table name.</p> <p><b>Note</b> The table name must be the same as the name used in the translation object that requires the table.</p>
5	<p>From the Table Type section, select the Cross-reference or Lookup table option.</p>
6	<p>Click SAVE.</p> <p><b>System Response</b> The information is saved and the CrossRef Select or Lookup Select dialog box is displayed.</p>
7	<p>Click NEW.</p> <p><b>System Response</b> The CrossRef Entry or Lookup Entry dialog box is displayed, depending on the type of table you selected on the New Table dialog box.</p>
8	<p>Type the table values. You can enter the following:</p> <ul style="list-style-type: none"> <li>■ Two values for a cross-reference and one value for a lookup table</li> <li>■ A description</li> <li>■ Any other reference information for the entry</li> </ul> <p><b>Note</b> The way that the data you enter is used depends on how the translation object is defined. Consult with the translation object designer if you are unclear about what is required.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

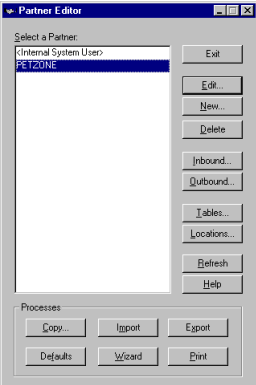
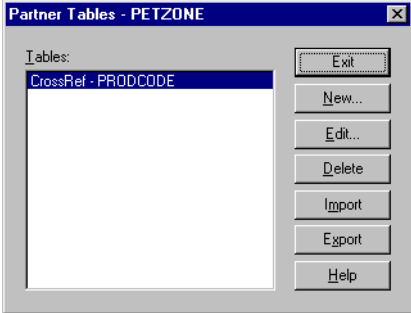
<b>(Cont.) Step</b>	<b>Action</b>
9	Click SAVE after each entry to save the information and enter another table record.
10	Once you finish typing all entries, click EXIT. <b>System Response</b> The Cross-reference (or Lookup) Select dialog box is displayed.
11	Click EXIT. <b>System Response</b> The Partner Editor dialog box is displayed.

---

# Editing a Table

## Procedure

To edit a partner table, complete the following steps:

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<ul style="list-style-type: none"> <li>■ Select the partner profile or the system partner (&lt;Internal System User&gt;) for which you want to modify a Cross-reference or Lookup table.</li> <li>■ Click TABLES.</li> </ul> <p>The Partner Tables dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

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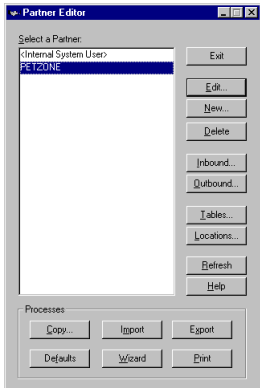

<b>(Cont.) Step</b>	<b>Action</b>
3	<ul style="list-style-type: none"><li>■ Select the table you want to modify.</li><li>■ Click EDIT.</li></ul> <p><b>System Response</b> The CrossRef Select or Lookup Select dialog box is displayed, depending on the type of table.</p>
4	<ul style="list-style-type: none"><li>■ Select the item you want to modify.</li><li>■ Click EDIT.</li></ul> <p><b>System Response</b> The CrossRef Entry or Lookup Entry dialog box is displayed, depending on the type of table.</p>
5	Modify the entry.
6	Once you finish modifying all necessary table entries, click SAVE.  <b>System Response</b> The Cross-reference or Lookup Select dialog box.
7	Click EXIT.  <b>System Response</b> The Partner Editor dialog box is displayed.

---

# Deleting Entries in a Table

## Procedure

To delete entries in a partner table, complete the following steps:

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<ul style="list-style-type: none"> <li>■ Select the partner profile or the system partner (&lt;Internal System User&gt;) for which you want to delete a table entry.</li> <li>■ Click TABLES.</li> </ul> <p>The Partner Tables dialog box is displayed.</p> 

*Continued on next page*

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<b>(Cont.) Step</b>	<b>Action</b>
3	<ul style="list-style-type: none"><li>■ Select the table you want to modify.</li><li>■ Click EDIT.</li></ul> <p><b>System Response</b> The CrossRef Select or Lookup Select dialog box is displayed, depending on the type of table.</p>
4	<ul style="list-style-type: none"><li>■ Select the item you want to modify.</li><li>■ Click DELETE.</li></ul> <p><b>System Response</b> The Confirm Delete dialog box is displayed.</p>
5	Click YES to complete the deletion. <p><b>System Response</b> The CrossRef Select or Lookup Select dialog box is displayed.</p>
6	Click EXIT. <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>

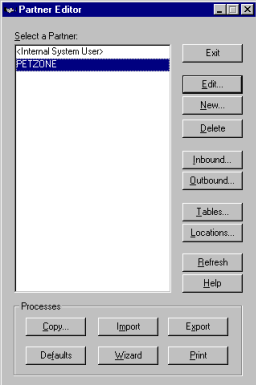

---



# Deleting a Table

## Procedure

To delete a partner table, complete the following steps:

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<ul style="list-style-type: none"> <li>■ Select the partner profile for which you want to delete a table.</li> <li>■ Click TABLES.</li> </ul> <p>The Partner Tables dialog box is displayed.</p> 

*Continued on next page*

<b>(Cont.) Step</b>	<b>Action</b>
3	<ul style="list-style-type: none"><li>■ Select the table you want to delete.</li><li>■ Click DELETE.</li></ul> <p><b>System Response</b> The Confirm Delete dialog box is displayed.</p>
4	Click YES to complete the deletion and return to the Partner Editor dialog box.

---

# Exporting Partner Tables

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## Introduction

The Table Export function enables you to export partner cross-reference and lookup tables to a sequential file. This allows you to define a table for one trading partner and copy that table to another partner profile.

## Export file layout

Typically, you export and then import tables created for another partner profile. However, if necessary, you can build tables outside of Gentran:Director by formatting your data in the export file layout.

The export file layout is a free-format ASCII text file. Each field must be delimited, or separated, with Hex01.

### Note

You can create the file with a text editor such as Notepad. The default file extension for a lookup export file is “.LKP.” The default file extension for a cross-reference file is “.XRF.”

### Lookup table fields

The fields in a lookup table are listed in the following table. Mandatory fields are designated with an asterisk[\*]:

Field	Description
<b>Partner key*</b>	A unique identifier for the partner.
<b>Table name*</b>	The name of the table. Because this field is displayed in the table selection list, the name should be descriptive.
<b>Item*</b>	The value that is found or “looked up” in the data during inbound or outbound processing.
<b>Description</b>	A brief comment about the item.
<b>Text1, Text2, Text3, Text4</b>	Additional reference information required by the translation object using this table.

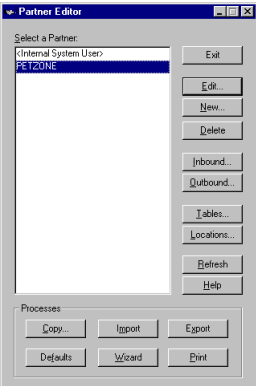

**Cross-reference table fields**

The fields in a cross-reference table are listed in the following table. Mandatory fields are designated with an asterisk (\*):

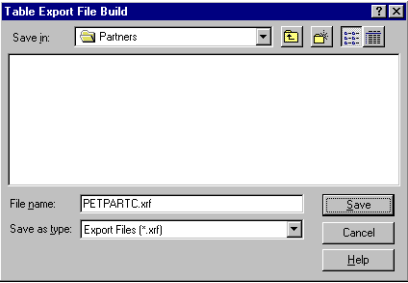
<b>Field</b>	<b>Description</b>
<b>Partner key*</b>	A unique identifier for the partner.
<b>Table name*</b>	The name of the table. Because this field is displayed in the table selection list, the name should be descriptive.
<b>My Item*</b>	Your data value that corresponds to your partner's data value.
<b>Partner Item*</b>	Your partner's data value that corresponds to your data value.
<b>Description</b>	A brief comment about the item.
<b>Text1, Text2, Text3, Text4</b>	Additional reference information required by the translation object using this table.

**Procedure**

To export a partner table, complete the following steps:

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<ul style="list-style-type: none"> <li>■ Select the partner profile or the system partner (&lt;Internal System User&gt;) for which you want to export a Cross-reference or Lookup table.</li> <li>■ Click TABLES.</li> </ul> <p>The Partner Tables dialog box is displayed.</p> 

*Continued on next page*

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click EXPORT.</p> <p><b>System Response</b> The Table Export File Build dialog box is displayed.</p> 
4	<p>From the Save in list, select the location of the exported table file.</p>
5	<p>Do one of the following:</p> <ul style="list-style-type: none"> <li>■ Type the export file name in the File name box.</li> <li>■ Select it from the list.</li> </ul> <p><b>Note</b> The default file extension for cross-reference tables is “.XRF”. The default file extension for lookup tables is “.LKP”.</p>
6	<p>Click SAVE to begin the export process.</p> <p><b>Note</b> When the export process is complete the system displays an informational dialog box.</p>
7	<p>Click OK.</p> <p><b>System Response</b> The Partner Tables dialog box is displayed.</p>
8	<p>Click EXIT.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>

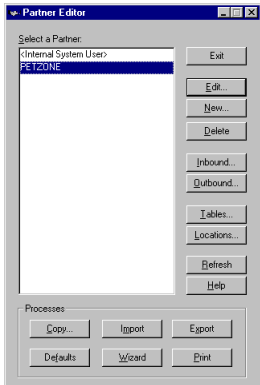
# Importing a Table

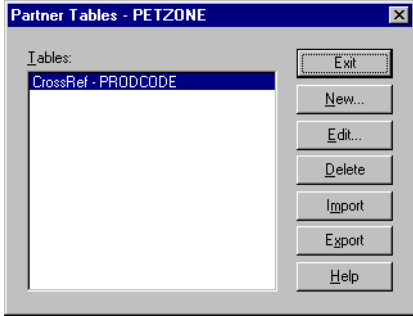
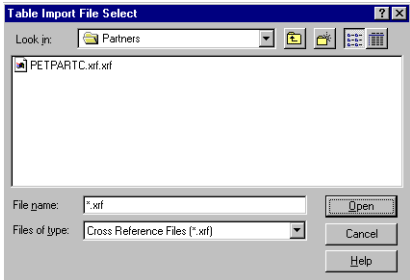
## Introduction

The Table Import function enables you to import partner cross-reference and lookup tables from a sequential file. This allows you to import tables created for another partner profile, or build tables outside of Gentran:Director by formatting your data in the export file layout.

## Procedure

To import a partner table, complete the following steps

Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
2	<ul style="list-style-type: none"> <li>■ Select the partner profile or the system partner (&lt;Internal System User&gt;) for which you want to import a Cross-reference or Lookup table.</li> <li>■ Click TABLES.</li> </ul> <p>The Partner Tables dialog box is displayed.</p> 
3	<p>Click IMPORT.</p> <p><b>System Response</b></p> <p>The Table Import File Select dialog box is displayed.</p> 
4	<p>From the Look in list, select the location of the table file.</p>
5	<ul style="list-style-type: none"> <li>■ Type the import file name in the File name box.</li> <li>■ Select it from the list.</li> </ul> <p><b>Note</b></p> <p>The default file extension for cross-reference tables is “.XRF”. The default file extension for lookup tables is “.LKP”.</p> <p style="text-align: right;"><i>Continued on next page</i></p>



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<b>(Cont.) Step</b>	<b>Action</b>
6	Click OPEN to begin the import process. <b>Note</b> When the export process is complete the system displays an informational dialog box.
7	Click OK. <b>System Response</b> The Partner Tables dialog box is displayed.
8	Click EXIT. <b>System Response</b> The Partner Editor dialog box is displayed.

---

# Using Partner Locations

## Overview

---

### Introduction

Each partner profile may have many associated location tables. You can use location tables in many different ways. For example, you may need a list of a partner's store addresses, warehouse addresses, or "invoice to" addresses. Any or all of these can be stored in a location table.

Locations are referenced in translation objects through one of the location keys or reference codes. Locations are used only if you use a translation object that specifically accesses those locations.

---

### Required parameters

Parameters are required to tell the system the following information:

- The name of the trading partner location
- The reference codes that the system uses to identify this location

These parameters are used to create a partner location.

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### Before you begin

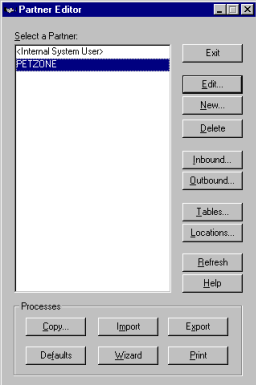
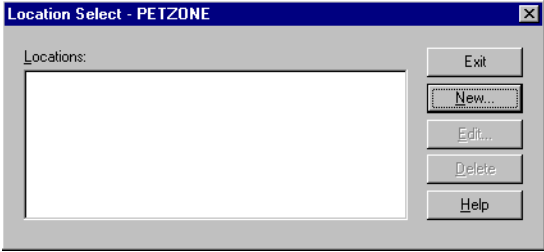
Before setting up a partner location, you must have the following information:

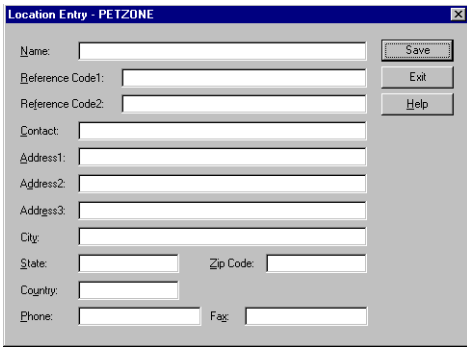
- The unique name that identifies this partner location
  - At least one reference code to identify the location
-

# Creating Partner Locations

## Procedure

To create partner locations, complete the following steps:

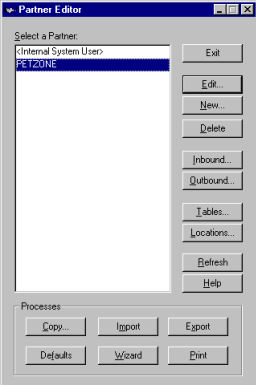
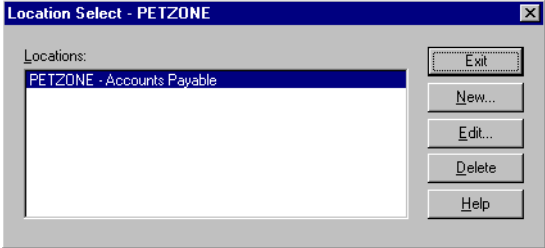
Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<p>Click LOCATIONS.</p> <p><b>System Response</b> The Location Select dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

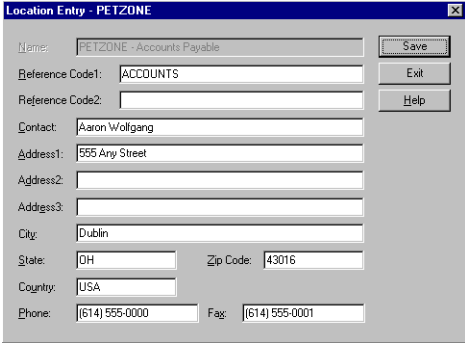
<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click NEW.</p> <p><b>System Response</b> The Location Entry dialog box is displayed.</p> 
4	<p>In the Name box, type a unique identifier that defines this location within the partner.</p>
5	<p>In the Reference Code 1 box, type the unique identifier for the location you are defining. For example, the DUNS number can be defined for the location.</p>
6	<p>Complete the remaining boxes, as necessary.</p> <p><b>Note</b> If you use Reference Code 2, it must also be unique.</p>
7	<p>Click SAVE.</p> <p><b>System Response</b> The location information is saved and a blank Location Entry dialog box is displayed.</p>
8	<p>If you want to enter additional locations for this partner, complete steps 4 through 7 as many times as necessary.</p>
9	<p>Click EXIT.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>

# Editing Partner Locations

## Procedure

To edit a partner location, complete the following steps:

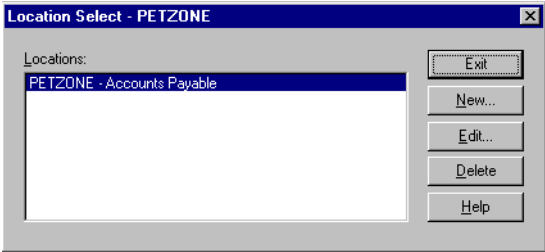
Step	Action
1	<p>From the Tools menu, select Partner Editor.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p> 
2	<p>Click LOCATIONS.</p> <p><b>System Response</b> The Location Select dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
<p>3</p>	<ul style="list-style-type: none"> <li>■ From the Locations list, select a location.</li> <li>■ Click EDIT.</li> </ul> <p><b>System Response</b> The Location Entry dialog box is displayed.</p> 
<p>4</p>	<p>Make any necessary changes.</p> <p><b>Note</b> The Reference Code1 box must be completed.</p>
<p>5</p>	<p>Do one of the following:</p> <ul style="list-style-type: none"> <li>■ Click SAVE to save the location information and return to the Location Select dialog box.</li> <li>■ Click EXIT if you want to return to the Location Select dialog box without saving changes.</li> </ul>
<p>6</p>	<p>Click EXIT.</p> <p><b>System Response</b> The Partner Editor dialog box is displayed.</p>

## Deleting Partner Locations

### Procedure

To delete a partner location and all associated records, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor. <b>System Response</b> The Partner Editor dialog box is displayed.
2	Click LOCATIONS. <b>System Response</b> The Location Select dialog box is displayed. 
3	<ul style="list-style-type: none"> <li>■ From the Locations list, select a location.</li> <li>■ Click DELETE.</li> </ul> <b>System Response</b> The Delete Confirmation dialog box is displayed, and prompts you to confirm the delete.
4	Click YES to confirm the delete.
5	Click EXIT. <b>System Response</b> The Partner Editor dialog box is displayed.





# *Using Documents*

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# Using Documents

## Overview

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### In this chapter

This chapter explains how to use the Gentran:Director document functions, including:

- Creating and editing documents
  - Managing documents
  - Routing documents
- 

### Using the Document Editor

The Document Editor is the Gentran:Director data entry tool that allows you to create, modify, and view documents.

#### Note

To use the Document Editor, you must register the appropriate screen entry translation object with the system and set up a corresponding outbound relationship for the partner.

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# Creating and Editing Documents

## Creating a Document

### Introduction

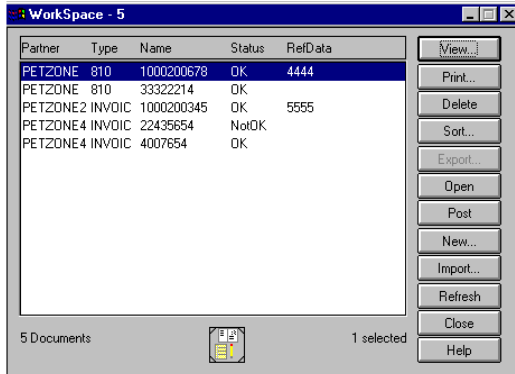
To create a document using the Document Editor, the system must be set up to support screen entry for the partner/transaction set combination you want to enter.

### Note

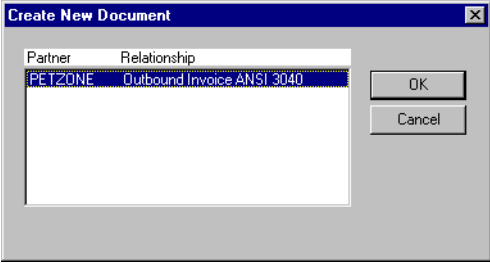
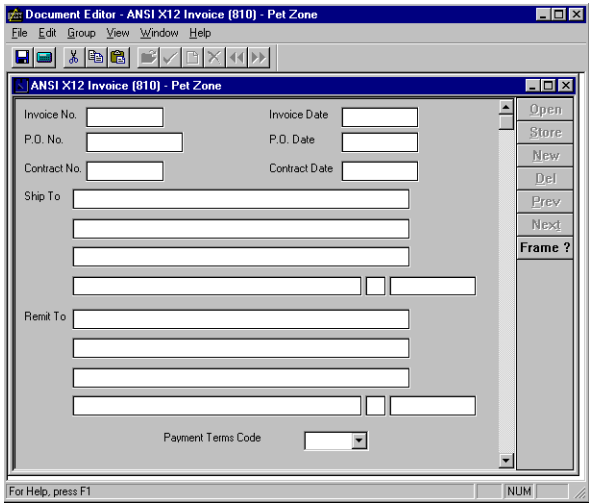
The appropriate Screen Entry translation object must be registered and a corresponding Outbound relationship must be set up for the partner. For more information, see *Registering (Installing) a New Translation Object* on page 2 - 3 and *Creating a New Outbound Relationship* on page 3 - 43.

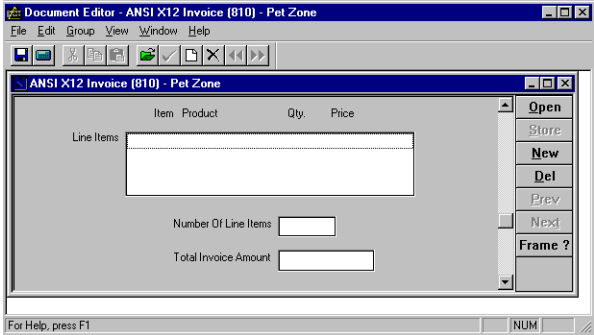
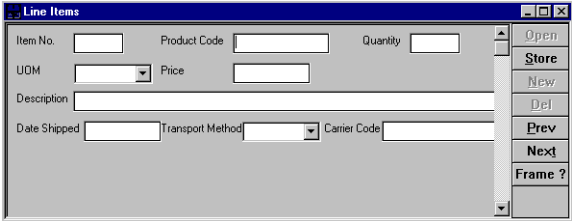
### Procedure

Complete the following steps to create a document:

Step	Action																														
1	<p>From The Desk, select Workspace.</p> <p><b>System Response</b> The Workspace browser is displayed.</p>  <p>The screenshot shows a window titled 'WorkSpace - 5'. It contains a table with the following data:</p> <table border="1"> <thead> <tr> <th>Partner</th> <th>Type</th> <th>Name</th> <th>Status</th> <th>RefData</th> </tr> </thead> <tbody> <tr> <td>PETZONE</td> <td>810</td> <td>1000200678</td> <td>OK</td> <td>4444</td> </tr> <tr> <td>PETZONE</td> <td>810</td> <td>33322214</td> <td>OK</td> <td></td> </tr> <tr> <td>PETZONE2 INVOIC</td> <td></td> <td>1000200345</td> <td>OK</td> <td>5555</td> </tr> <tr> <td>PETZONE4 INVOIC</td> <td></td> <td>22435654</td> <td>NotOK</td> <td></td> </tr> <tr> <td>PETZONE4 INVOIC</td> <td></td> <td>4007654</td> <td>OK</td> <td></td> </tr> </tbody> </table> <p>At the bottom of the window, it says '5 Documents' and '1 selected'. A vertical toolbar on the right side of the window contains buttons for View..., Print..., Delete, Sort..., Export..., Open, Post, New..., Import..., Refresh, Close, and Help.</p>	Partner	Type	Name	Status	RefData	PETZONE	810	1000200678	OK	4444	PETZONE	810	33322214	OK		PETZONE2 INVOIC		1000200345	OK	5555	PETZONE4 INVOIC		22435654	NotOK		PETZONE4 INVOIC		4007654	OK	
Partner	Type	Name	Status	RefData																											
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PETZONE4 INVOIC		22435654	NotOK																												
PETZONE4 INVOIC		4007654	OK																												

*Continued on next page*

<b>(Cont.) Step</b>	<b>Action</b>
2	<p>Click NEW.</p> <p><b>System Response</b> The Create New Document dialog box is displayed.</p> 
3	<ul style="list-style-type: none"> <li>■ Select the appropriate partner/transaction set combination from the list.</li> <li>■ Click OK.</li> </ul> <p><b>System Response</b> The translation object for the selected combination is displayed.</p> <p><b>Example</b> The following illustration is an example of a translation object.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

(Cont.) Step	Action
4	<p>Type all the required data items into the boxes on the document translation object.</p> <p><b>Note</b></p> <p>If the document contains a looping structure, or lower-level detail records such as line items, then the input translation object contains a list, as in the illustration below.</p> 
5	<p>To access items in a list, highlight the first entry and click NEW.</p> 
6	<p>Enter the data for the item.</p> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>■ To enter a second or subsequent item, click NEXT or press <b>ALT + T</b>.</li> <li>■ After all loop items are entered, click STORE to save and exit the loop dialog box.</li> <li>■ If the document contains codes, press <b>SHIFT + F1</b> from each code field to access a list of the codes.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
7	<p>If the document contains calculated fields, select Recalculate from the Document Editor File menu before saving the document.</p> <p><b>System Response</b> The totals are updated, and the document is checked for errors.</p>
8	<p>When you are finished entering data, select Save from the Document Editor File menu.</p> <p><b>System Response</b> The system saves the information and automatically recalculates and check for errors. If errors are found, you are prompted to view the errors.</p>
9	<p>Select Exit from the Document Editor File menu.</p> <p><b>System Response</b> The Document Editor is closed. The system prompts you to save the document before closing.</p> <p><b>Note</b> You can now open and edit this document from the Workspace browser.</p>

# Opening and Editing a Document

## Introduction

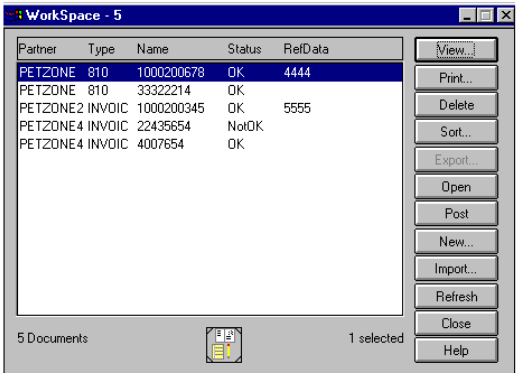
To edit a document using the Document Editor, you need to load the appropriate screen entry translation object for the partner/transaction set combination you want to edit.

## Reference

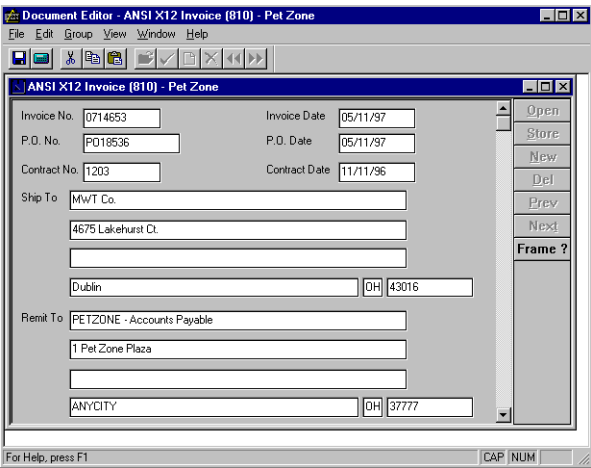
For more information on registering a translation object, see *Registering (Installing) a New Translation Object* on page 2 - 3. For more information on selecting a translation object for a partner relationship, see *Creating a New Outbound Relationship* on page 3 - 43.

## Procedure

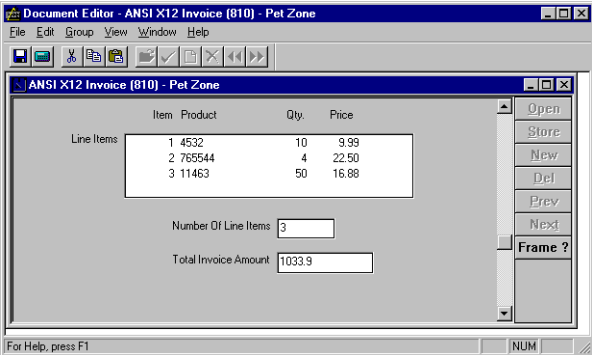
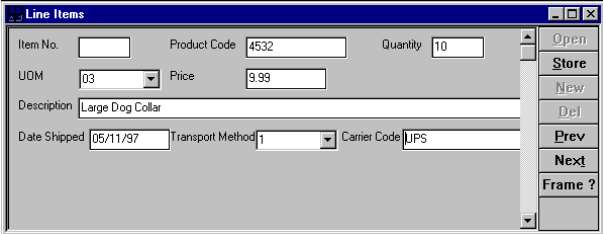
To open and edit a document, complete the following steps:

Step	Action																														
1	<p>From The Desk, select Workspace.</p> <p><b>System Response</b> The Workspace browser is displayed.</p>  <p>The screenshot shows a window titled 'WorkSpace - 5' with a table containing the following data:</p> <table border="1"> <thead> <tr> <th>Partner</th> <th>Type</th> <th>Name</th> <th>Status</th> <th>RefData</th> </tr> </thead> <tbody> <tr> <td>PETZONE</td> <td>810</td> <td>1000200678</td> <td>OK</td> <td>4444</td> </tr> <tr> <td>PETZONE</td> <td>810</td> <td>33322214</td> <td>OK</td> <td></td> </tr> <tr> <td>PETZONE2</td> <td>INVOIC</td> <td>1000200345</td> <td>OK</td> <td>5555</td> </tr> <tr> <td>PETZONE4</td> <td>INVOIC</td> <td>22435654</td> <td>NotOK</td> <td></td> </tr> <tr> <td>PETZONE4</td> <td>INVOIC</td> <td>4007654</td> <td>OK</td> <td></td> </tr> </tbody> </table> <p>At the bottom of the window, it indicates '5 Documents' and '1 selected'.</p>	Partner	Type	Name	Status	RefData	PETZONE	810	1000200678	OK	4444	PETZONE	810	33322214	OK		PETZONE2	INVOIC	1000200345	OK	5555	PETZONE4	INVOIC	22435654	NotOK		PETZONE4	INVOIC	4007654	OK	
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PETZONE4	INVOIC	22435654	NotOK																												
PETZONE4	INVOIC	4007654	OK																												

*Continued on next page*

<b>(Cont.) Step</b>	<b>Action</b>
2	<p>From the Workspace, select the document.</p> <p><b>Note</b>  <i>Only</i> documents in the Workspace can be edited.</p> <ul style="list-style-type: none"> <li>■ If the document has already been moved to the Out Documents and has not been sent, you can move it back to the Workspace using the UnPost function. See <i>UnPosting a Document</i> on page 4 - 37.</li> <li>■ If a document has been sent, it <i>cannot</i> be modified. However, you can move a copy of the document from the Out Drawer to the Workspace, modify the copy, and send it. See <i>Copying a Document (to Reprocess and Resend)</i> on page 4 - 34..</li> </ul>
3	<p>Click OPEN.</p> <p><b>System Response</b>                      The document is displayed in the Document Editor facility.</p>  <p>The screenshot shows a window titled "Document Editor - ANSI X12 Invoice (810) - Pet Zone". The window contains a form with the following fields:</p> <ul style="list-style-type: none"> <li>Invoice No.: 0714653</li> <li>Invoice Date: 05/11/97</li> <li>P.O. No.: PO18536</li> <li>P.O. Date: 05/11/97</li> <li>Contract No.: 1203</li> <li>Contract Date: 11/11/96</li> <li>Ship To: MWT Co., 4675 Lakehurst Ct., Dublin, OH 43016</li> <li>Remit To: PETZONE - Accounts Payable, 1 Pet Zone Plaza, ANYCITY, OH 37777</li> </ul> <p>Buttons on the right side of the form include Open, Store, New, Del, Prev, Next, and Frame ?. The status bar at the bottom indicates "For Help, press F1" and "CAP NUM".</p> <p style="text-align: right;"><i>Continued on next page</i></p>



(Cont.) Step	Action																				
<p>4</p> <p><b>Note</b></p> <p>If the document contains a looping structure, or lower-level detail records such as line items, then the input translation object contains a list, as in the illustration below.</p>	 <p>The screenshot shows a window titled "Document Editor - ANSI X12 Invoice (810) - Pet Zone". It contains a table of line items:</p> <table border="1"> <thead> <tr> <th>Line Items</th> <th>Item</th> <th>Product</th> <th>Qty.</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td></td> <td>1</td> <td>4532</td> <td>10</td> <td>9.99</td> </tr> <tr> <td></td> <td>2</td> <td>765544</td> <td>4</td> <td>22.50</td> </tr> <tr> <td></td> <td>3</td> <td>11463</td> <td>50</td> <td>16.88</td> </tr> </tbody> </table> <p>Below the table, there are input fields for "Number Of Line Items" (value: 3) and "Total Invoice Amount" (value: 1033.9). A vertical toolbar on the right includes buttons for Open, Store, New, Del, Prev, Next, and Frame?.</p>	Line Items	Item	Product	Qty.	Price		1	4532	10	9.99		2	765544	4	22.50		3	11463	50	16.88
Line Items	Item	Product	Qty.	Price																	
	1	4532	10	9.99																	
	2	765544	4	22.50																	
	3	11463	50	16.88																	
<p>5</p>	<ul style="list-style-type: none"> <li>■ To add a new line item, highlight the first entry and click NEW.</li> <li>■ To access items in the list, highlight the entry to be changed and click OPEN. You can also double-click the item.</li> </ul>  <p>The screenshot shows a "Line Items" dialog box with the following fields:</p> <ul style="list-style-type: none"> <li>Item No.: [ ]</li> <li>Product Code: 4532</li> <li>Quantity: 10</li> <li>UDM: 03</li> <li>Price: 9.99</li> <li>Description: Large Dog Collar</li> <li>Date Shipped: 05/11/97</li> <li>Transport Method: 1</li> <li>Carrier Code: UPS</li> </ul> <p>A vertical toolbar on the right includes buttons for Open, Store, New, Del, Prev, Next, and Frame?.</p>																				

*Continued on next page*

<b>(Cont.) Step</b>	<b>Action</b>
6	<p>You can now change or enter data for the item.</p> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>■ To move through the entries, use NEXT and PREV.</li> <li>■ To enter a second or subsequent item, click NEXT or press <b>ALT + T</b>.</li> <li>■ After all loop items are entered, click STORE to save and exit the loop dialog box.</li> <li>■ If the document contains codes, press <b>SHIFT + F1</b> from each code field to access a list of the codes.</li> </ul>
7	<p>If the document contains calculated fields, select Recalculate from the Document Editor File menu before saving the document.</p> <p><b>System Response</b></p> <p>The totals are updated and the document is checked for errors.</p>
8	<p>When you are finished entering data, select Save from the Document Editor File menu.</p> <p><b>System Response</b></p> <p>The information is saved and automatically recalculated and checked for errors. If errors are found, you are prompted to view the errors.</p>
9	<p>From the Document Editor File menu, select Exit.</p> <p><b>System Response</b></p> <p>The Document Editor is closed and the system prompts you to save the document before closing.</p>

# Managing Documents

## Accessing Document Browsers

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### Introduction

You can access document browsers in Gentran:Director in any of the following ways:

- **The Desk** enables you to access the In Documents, ?In Documents, Workspace, Out Documents, ?Out Documents, Interchanges, In Drawer, and Out Drawer.
- The **Main Toolbar** gives you access to the In Documents, ?In Documents, Workspace, Out Documents, ?Out Documents, Interchanges, In Drawer, Out Drawer, and Send Queue.
- The **View menu** gives you access to the In Documents, ?In Documents, Workspace, Out Documents, ?Out Documents, Interchanges, In Drawer, Out Drawer, and Send Queue.

---

### Summary dialog boxes

If you select the In Documents, ?In Documents, Out Documents, ?Out Documents, In Drawer, or Out Drawer browser from any of the three locations above, the appropriate summary dialog box for that browser is displayed.

The summary dialog box displays the number of each type of document for each partner contained in the browser. This enables you to filter the display of documents in the browser to only those of the document type and partner that you want.

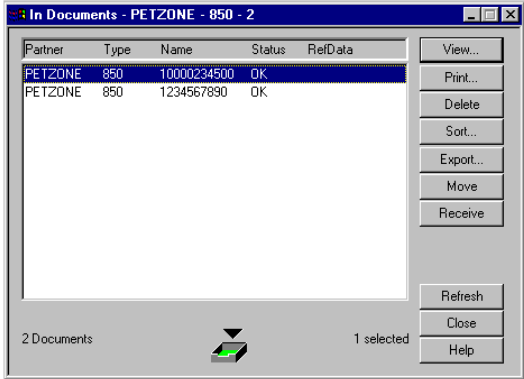
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## Procedure

Complete the following steps to access these browsers:

- In Documents
- ?In Documents
- Out Documents
- ?Out Documents
- In Drawer
- Out Drawer

Step	Action
1	From The Desk, select a browser. <b>System Response</b> The summary dialog box for that browser is displayed.
2	Select the type of document for the appropriate partner. <b>Note</b> <ul style="list-style-type: none"> <li>■ To highlight more than one partner/document type combination, click on the first partner/document type, press <b>SHIFT</b>, and then click the last partner/document type in the group.</li> <li>■ To highlight several partner/document types that are not adjacent to each other in the summary dialog box, press and hold <b>CTRL</b> while clicking each partner/document type.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click VIEW.</p> <p><b>System Response</b> The browser containing those documents is displayed.</p> <p><b>Example</b> The following is an example of the In Documents browser.</p> 

## Viewing a Document

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### View function

The View function enables you to view various types of information, depending on the format selected in the View Choice dialog box. The view types include:

- The raw input data
- EDI-formatted data
- A translator report
- Tracking information

#### Note

The formatted view option is only active if a Screen Entry translation object is available in the Partner Relationship record.

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### Using the View function

The View function can be accessed when one of the following occurs:

- A document browser such as In Documents, Out Documents, Workspace, In Drawer, and Out Drawer is active and a single document is selected.
- The Interchanges or Restored Interchanges browser is active and a single document within an interchange is selected.

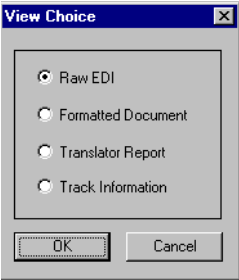
#### Reference

For information on the Interchanges browser, see *Viewing Documents within Interchanges* on page 6 - 11.

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## Viewing a Document from the Document Browsers

To view a document from a document browser, complete the following steps:

Step	Action
1	<p>From the desk, select the In Documents, Out Documents, Workspace, In Drawer, or Out Drawer browser.</p> <p><b>System Response</b> The summary dialog box for that browser is displayed.</p>
2	<ul style="list-style-type: none"> <li>■ Select the type of document for the appropriate partner.</li> <li>■ Click VIEW.</li> </ul> <p><b>System Response</b> The browser containing those documents is displayed.</p>
3	<p>Select a single document from the appropriate browser.</p>
4	<p>Click VIEW.</p> <p><b>System Response</b> The View Choice dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
5	Use the following table to select the option that corresponds to how you want the input data displayed.  <b>Note</b> Some selections may not be available.	
	<b>Select...</b>	<b>To display...</b>
	Raw EDI	The data in EDI format.
	Formatted Document	The data formatted with a screen entry translation object.  <b>Note</b> This option is not available if no screen entry translation object exists for the document.
	Translator Report	A report of the actions the translator took on this document and lists any EDI- or translation object-based compliance errors.  <b>Reference</b> For a detailed explanation of translator reports, see “Appendix C, Error Messages” in the <i>Administrator’s Guide</i> .
Track Information	The document tracking information that is available for a single document.  <b>Note</b> This function is not available if document level auditing is disabled.  <b>Reference</b> For more information on enabling document level auditing, see “System Administrator Functions” in the <i>Administrator’s Guide</i> .	
6	Click OK to access the view that you specified.	



## Viewing a Document from the Interchange Browser

To view a document from the Interchanges or Restored Interchanges browser, complete the following steps:

<b>Step</b>	<b>Action</b>
1	From the appropriate area of The Desk, select the Interchanges browser.
2	Select a single document.
3	Click the Data icon on the Toolbar. <b>System Response</b> The raw EDI data view of the Interchange is displayed in the Data View window on the Interchanges or Restored Interchanges browser.

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## Viewing Currently Processing Documents

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### **Processing browser**

The Processing browser displays any document that is currently being processed in the Gentran:Director system. The Processing browser allows you to find which documents are currently being processed by you or other users in the Gentran:Director system.

#### **Note**

Any document that is currently being processed in the Gentran:Director system is displayed in the browser as unavailable. You are not permitted to access that document until processing is complete and the document has been released to the system.

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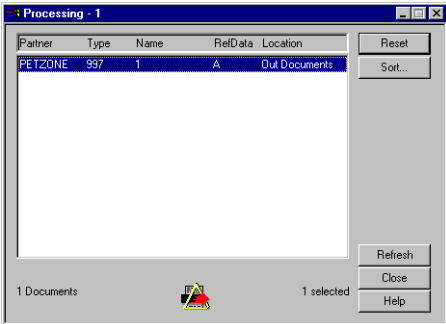
### **Reset function**

The Processing browser enables you to use the Reset function and return any documents that are displayed in the browser, but for which processing has terminated, to their previous location. Typically, you use this function for exception cases when the processing of a document terminated improperly.

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## Procedure

To view the documents that are currently being processed, complete the following steps:

Step	Action							
1	<p>From the View menu, select Processing.</p> <p><b>System Response</b> The Processing browser is displayed.</p> 							
2	<p>You can perform the following functions on the Processing browser:</p> <table border="1" data-bbox="559 986 1244 1487"> <thead> <tr> <th data-bbox="559 986 844 1041">Function</th> <th data-bbox="844 986 1244 1041">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="559 1041 844 1124">Sort</td> <td data-bbox="844 1041 1244 1124">Arranges the columns of the documents in the active browser.</td> </tr> <tr> <td data-bbox="559 1124 844 1487">Reset</td> <td data-bbox="844 1124 1244 1487"> <p>Returns any documents that are displayed in the Processing browser, but for which processing has terminated, to their previous location.</p> <p><b>Note</b> This function is typically used for exception cases when the processing of a document terminated improperly.</p> </td> </tr> </tbody> </table>		Function	Action	Sort	Arranges the columns of the documents in the active browser.	Reset	<p>Returns any documents that are displayed in the Processing browser, but for which processing has terminated, to their previous location.</p> <p><b>Note</b> This function is typically used for exception cases when the processing of a document terminated improperly.</p>
Function	Action							
Sort	Arranges the columns of the documents in the active browser.							
Reset	<p>Returns any documents that are displayed in the Processing browser, but for which processing has terminated, to their previous location.</p> <p><b>Note</b> This function is typically used for exception cases when the processing of a document terminated improperly.</p>							

## Finding Specific Text in a Document

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### Find function

The Find function enables you to find specified text in the active data-view window.

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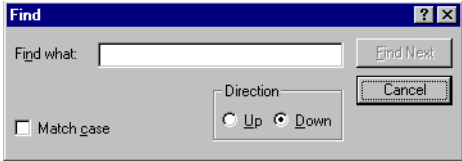
### Using the Find function

The Find function is available when a data-view is the active window. The following are the data-view windows:

- Audit Log
  - Document Tracking
  - Interchange Tracking
  - Raw Data-View of an Interchange
  - Raw Data-View of a Document
-

**Procedure**

To find specified text, complete the following steps:

Step	Action												
1	<p>Access one of the following data-view windows:</p> <table border="1" data-bbox="272 435 1236 1104"> <thead> <tr> <th data-bbox="272 435 552 487">Window</th> <th data-bbox="552 435 1236 487">Access by...</th> </tr> </thead> <tbody> <tr> <td data-bbox="272 487 552 539">Audit Log</td> <td data-bbox="552 487 1236 539">selecting Audit Log from the View menu.</td> </tr> <tr> <td data-bbox="272 539 552 661">Document Tracking</td> <td data-bbox="552 539 1236 661"> <ul style="list-style-type: none"> <li>■ selecting a document in a browser</li> <li>■ selecting View from the Commands menu</li> <li>■ clicking the Tracking information option and OK</li> </ul> </td> </tr> <tr> <td data-bbox="272 661 552 782">Interchange Tracking</td> <td data-bbox="552 661 1236 782"> <ul style="list-style-type: none"> <li>■ selecting an interchange in the Interchanges browser</li> <li>■ selecting View from the Commands menu</li> <li>■ clicking the Tracking information option and OK</li> </ul> </td> </tr> <tr> <td data-bbox="272 782 552 965">Raw Data View of an Interchange</td> <td data-bbox="552 782 1236 965"> <ul style="list-style-type: none"> <li>■ selecting Interchanges from The Desk</li> <li>■ selecting an interchange from the Interchanges browser</li> <li>■ selecting Interchanges from the View menu</li> <li>■ selecting Data from the Interchanges cascading menu to display the raw EDI data</li> </ul> </td> </tr> <tr> <td data-bbox="272 965 552 1104">Raw Data View of a Document</td> <td data-bbox="552 965 1236 1104"> <ul style="list-style-type: none"> <li>■ selecting a document in the Interchanges browser</li> <li>■ selecting View from the Commands menu</li> <li>■ clicking OK on the View Choice dialog box to display the raw EDI data</li> </ul> </td> </tr> </tbody> </table>	Window	Access by...	Audit Log	selecting Audit Log from the View menu.	Document Tracking	<ul style="list-style-type: none"> <li>■ selecting a document in a browser</li> <li>■ selecting View from the Commands menu</li> <li>■ clicking the Tracking information option and OK</li> </ul>	Interchange Tracking	<ul style="list-style-type: none"> <li>■ selecting an interchange in the Interchanges browser</li> <li>■ selecting View from the Commands menu</li> <li>■ clicking the Tracking information option and OK</li> </ul>	Raw Data View of an Interchange	<ul style="list-style-type: none"> <li>■ selecting Interchanges from The Desk</li> <li>■ selecting an interchange from the Interchanges browser</li> <li>■ selecting Interchanges from the View menu</li> <li>■ selecting Data from the Interchanges cascading menu to display the raw EDI data</li> </ul>	Raw Data View of a Document	<ul style="list-style-type: none"> <li>■ selecting a document in the Interchanges browser</li> <li>■ selecting View from the Commands menu</li> <li>■ clicking OK on the View Choice dialog box to display the raw EDI data</li> </ul>
Window	Access by...												
Audit Log	selecting Audit Log from the View menu.												
Document Tracking	<ul style="list-style-type: none"> <li>■ selecting a document in a browser</li> <li>■ selecting View from the Commands menu</li> <li>■ clicking the Tracking information option and OK</li> </ul>												
Interchange Tracking	<ul style="list-style-type: none"> <li>■ selecting an interchange in the Interchanges browser</li> <li>■ selecting View from the Commands menu</li> <li>■ clicking the Tracking information option and OK</li> </ul>												
Raw Data View of an Interchange	<ul style="list-style-type: none"> <li>■ selecting Interchanges from The Desk</li> <li>■ selecting an interchange from the Interchanges browser</li> <li>■ selecting Interchanges from the View menu</li> <li>■ selecting Data from the Interchanges cascading menu to display the raw EDI data</li> </ul>												
Raw Data View of a Document	<ul style="list-style-type: none"> <li>■ selecting a document in the Interchanges browser</li> <li>■ selecting View from the Commands menu</li> <li>■ clicking OK on the View Choice dialog box to display the raw EDI data</li> </ul>												
2	<p>From the Edit menu, select Find.</p> <p><b>System Response</b> The Find dialog box is displayed.</p> 												
3	<p>In the Find What box, type the text you want to locate.</p> <p style="text-align: right;"><i>Continued on next page</i></p>												

<b>(Cont.) Step</b>	<b>Action</b>
4	Do you want the system to search for case-sensitive text? <ul style="list-style-type: none"> <li>■ If yes, select the Match Case check box and continue with step 5.</li> <li>■ If no, continue with step 5.</li> </ul>
5	Click FIND NEXT to find the first occurrence of the specified text. <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>■ If the system locates that text, it is highlighted in the data-view window.</li> <li>■ If the system does not find the specified text, the system beeps. If this is the case, skip to step 6.</li> </ul>
6	If the system finds the specified text, continue clicking FIND NEXT to find each subsequent occurrence of that text. <p><b>Note</b></p> When the system has located the last occurrence of that text in the direction you specified, the system beeps.
7	Click CANCEL. <p><b>System Response</b></p> The data-view window is displayed.

# Sorting Documents

---

## Introduction

The Sort function can be used when the In Documents, ?In Documents, In Drawer, Workspace, Out Documents, ?Out Documents, or Send Queue browser is open. This function arranges the columns of the documents in the active browser into one of the following sequences:

- Partner/Type/Name
- Partner/Name/Type
- Type/Partner/Name
- Name/Type/Partner

The Sort function can also be used when the Out Drawer is active. The Sort function allows you to arrange the Out Drawer columns and filter the display of documents by status.

---

## Changing the default sort method

To change the default method that Gentran:Director uses to sort columns in the document browsers, complete the following steps:

Step	Action
1	From the Options menu, select Preferences. <b>System Response</b> The Preferences dialog box is displayed.
2	Click the Sort Columns tab. <b>System Response</b> The default sort order is displayed.
3	Select the option that corresponds to the appropriate sort order.
4	Click OK. <b>System Response</b> The change is saved globally.

---

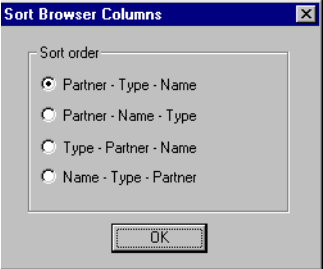
## Sorting document columns in browsers

To sort the columns of documents in these browsers, complete the following steps:

- In Documents
- ?In Documents
- In Drawer
- Workspace
- Out Documents
- ?Out Documents
- Send Queue

Step	Action
1	From The Desk, select the browser where the documents are located.  <b>System Response</b> If you select the In Documents, ?In Documents, Out Documents, ?Out Documents, In Drawer, Out Drawer, or Send Queue browser, the summary dialog box for that browser is displayed.
2	If a summary dialog box is displayed: <ul style="list-style-type: none"> <li>■ Select the type of document for the appropriate partner.</li> <li>■ Click VIEW.</li> </ul> <b>System Response</b> The browser containing those documents is displayed.  <i>Continued on next page</i>

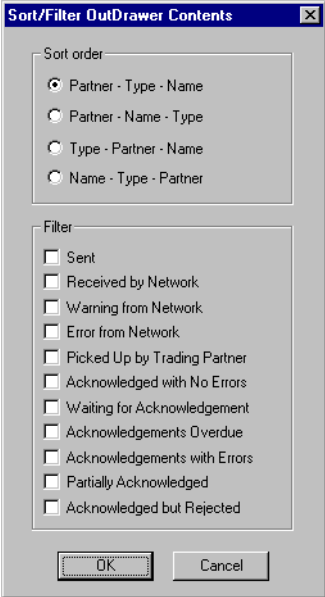


<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click SORT.</p> <p><b>System Response</b> The Sort Browser Columns dialog box is displayed.</p> 
4	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select the appropriate option for the desired sort order.</li> <li>■ Click OK.</li> </ul> <p><b>System Response</b> The list of documents is sorted in the specified sort order.</p>

## Sorting with Out Drawer browser

Complete the following steps to sort the columns of the documents or filter the document display in the Out Drawer browser:

<b>Step</b>	<b>Action</b>
1	<p>From The Desk, select the Out Drawer.</p> <p><b>System Response</b> The Out Drawer Summary dialog box is displayed.</p>
2	<ul style="list-style-type: none"> <li>■ Select the type of document for the appropriate partner.</li> <li>■ Click VIEW.</li> </ul> <p><b>System Response</b> The Out Drawer browser is displayed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click SORT.</p> <p><b>System Response</b> The Sort/Filter Out Drawer Contents dialog box is displayed.</p> 
4	<p>Do you want to sort the browser columns?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, click the appropriate option for the desired sort order and continue with step 5.</li> <li>■ If <i>no</i>, continue with step 5.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
5	<p>If you want to filter the display of documents in the Out Drawer by document status, you can choose not to display documents with certain statuses. Select the check box next to each status that you do not want displayed.</p> <p><b>Note</b> When you clear a check box, the display of that status is turned “off.” The default is to display documents regardless of status.</p> <p>Use the following table to determine which check boxes to select:</p>	
	<b>Status Code</b>	<b>Description</b>
	Sent	Indicates that the document was successfully transmitted.
	OnNet	<p>Indicates that the document was successfully delivered to a value-added network.</p> <p><b>Note</b> To obtain this status using Commerce:Network, you must have your mailbox configured to receive the 20 report in data format.</p>
	NetWarn	<p>Indicates that the document was delivered to a value-added network and the network detected non-critical errors in the data. The data is available to be picked up by the designated trading partner.</p> <p><b>Note</b> To obtain this status using Commerce:Network, you must have your mailbox configured to receive the 20 report in data format.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
5 (cont.)	<b>Status Code</b>	<b>Description</b>
	NetErr	<p>Indicates that the document was delivered to a value-added network and the network detected critical errors in the data. The data is available to be picked up by the designated trading partner.</p> <p><b>Note</b> To obtain this status using Commerce:Network, you must have your mailbox configured to receive the 20 report in data format.</p>
	PickedUp	<p>Indicates that the document was successfully delivered to a trading partner via a value-added network.</p> <p><b>Note</b> To obtain this status using Commerce:Network, you must have your mailbox configured to receive the 70 report in data format.</p>
	Ack'd	<p>Indicates that the document was acknowledged by your partner and there were no errors.</p>
	Waiting	<p>Indicates that the document is waiting to be reconciled with an inbound functional acknowledgment.</p>
Overdue	<p>Indicates that the document is waiting to be reconciled with an inbound functional acknowledgment but has exceeded the number of hours by which that acknowledgment is deemed late.</p> <p style="text-align: right;"><i>Continued on next page</i></p>	

<b>(Cont.) Step</b>	<b>Action</b>	
5 (cont.)	<b>Status Code</b>	<b>Description</b>
	AckErr	Indicates that the document was acknowledged by your partner and there were errors, but it was accepted by your partner in spite of the errors.
	~Ack	<p>This status is only displayed if there were no acknowledgments expected for this document and either the group or the interchange was partially acknowledged.</p> <p><b>Note</b> If your partner is going to issue partial acknowledgments at the interchange or group level, they should also indicate acceptance or rejection at the transaction level.</p>
	Reject	Indicates that the document was acknowledged by your partner and there were errors. The document was rejected by your partner.
	<p>Click OK.</p> <p><b>System Response</b> The contents of the Out Drawer is sorted or filtered as specified.</p>	

# Deleting a Document

## Introduction

The Delete function is used to remove a document or group of documents from the system.

### Notes

- When a document is deleted, all the associated document information, tracking information, and translation report information is also deleted.
- When the last document in an interchange is deleted, the interchange entry is also deleted.

## Procedure

To delete a document or group of documents, complete the following steps:

Step	Action
1	From The Desk, select the current location of the document. <b>System Response</b> If you select the In Documents, ?In Documents, Out Documents, ?Out Documents, In Drawer, or Out Drawer browser, the summary dialog box for that browser is displayed.
2	If a summary dialog box is displayed, select the type of document for the appropriate partner and click VIEW. <b>System Response</b> The browser containing those documents is displayed.
3	Click DELETE. <b>System Response</b> The confirmation dialog box is displayed.
4	Click YES. <b>System Response</b> The document is deleted.

# Printing a Document

## Introduction

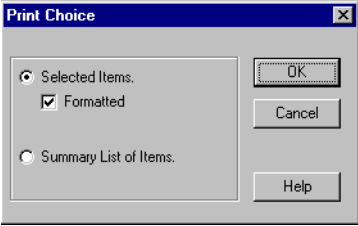
If no documents are selected, the Print function prints a summary list of all documents in the browser. For selected documents, the Print function prints one of the following:

- Raw EDI data
- Formatted version of the documents using the print translation object established (partner relationship)
- Summary list of those documents

## Procedure

To print a document or group of documents, complete the following steps:

Step	Action
1	From The Desk, select the current location of the document. <b>System Response</b> If you select the In Documents, ?In Documents, Out Documents, ?Out Documents, In Drawer, or Out Drawer browser, the summary dialog box for that browser is displayed.
2	Do the following: <ul style="list-style-type: none"> <li>■ Select the type of document for the appropriate partner.</li> <li>■ Click VIEW.</li> </ul> <b>System Response</b> The browser containing those documents is displayed.
3	Do you want to print a summary list of all documents? <ul style="list-style-type: none"> <li>■ If <i>yes</i>, click PRINT to access the Print dialog box. Continue with step 6.</li> <li>■ If <i>no</i>, continue with step 4.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
4	<p>Do you want to print selected documents, either formatted or unformatted, or a summary list of selected documents?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, select a document or group of documents and click PRINT. Continue with step 5.</li> </ul> <p><b>System Response</b> The Print Choice dialog box is displayed.</p>  <ul style="list-style-type: none"> <li>■ If <i>no</i>, continue with step 6.</li> </ul>
5	<p>Select the appropriate option on the Print Choice dialog box and click OK.</p> <ul style="list-style-type: none"> <li>■ To print selected unformatted documents, select the Selected Items option.</li> <li>■ If you want the selected documents printed as formatted, select the Selected Items option <i>and</i> the Formatted check box. A print translation object must exist for the documents to be printed as formatted.</li> <li>■ To print a summary list of selected documents, select the Summary List of Items option.</li> </ul> <p><b>System Response</b> The Print dialog box is displayed.</p>
6	<p>On the Print dialog box, set the appropriate options and click OK.</p> <p><b>Note</b> The system displays the Print dialog box if you either selected no documents from the browser and clicked PRINT, or if you chose Summary List of Items from the Print Choice dialog box.</p>



# Routing Documents

## Moving a Document to the In Drawer

### Introduction

The routing function moves a selected document or group of documents to the In Drawer. Documents are automatically moved from the In Documents or ?In Documents to the In Drawer by the system at the completion of a successful Export or Print. However, you might want to manually move a document to the In Drawer so that you could create a turnaround (response) document.

### Note

You can only move documents to the In Drawer when In Documents or the ?In Documents is the active browser.

### Procedure

To move a document or group of documents, complete the following steps:

Step	Action
1	From The Desk, select the In Documents or ?In Documents. <b>System Response</b> The summary dialog box for that browser is displayed.
2	Do the following: <ul style="list-style-type: none"> <li>■ Select the type of document for the appropriate partner.</li> <li>■ Click VIEW.</li> </ul> <b>System Response</b> The browser containing those documents is displayed.
3	Select the documents that you want to move to the In Drawer.
4	Click MOVE. <b>System Response</b> The selected documents are moved to the In Drawer.

## Copying a Document (to Reprocess and Resend)

---

### Introduction

The Copy function copies a document that was already sent successfully to the Workspace, so you can modify the document and resend it. The Copy function can only be used when Out Drawer is active.

### Note

This function can result in sending duplicate documents to a trading partner.

### Reference

After you modify the documents, you may want to resend them. For more information on resending, see *Resending a Document* on page 5 - 9.

### Procedure

Complete the following steps to copy a document or group of documents:

Step	Action
1	From The Desk, select the Out Drawer. <b>System Response</b> The Out Drawer Summary dialog box is displayed.
2	Select the type of document for the appropriate partner and click VIEW. <b>System Response</b> The Out Drawer browser is displayed.
3	Select the documents that you want to copy to the Workspace.
4	Click COPY. <b>System Response</b> The selected documents are copied to the Workspace.

# Posting a Document

## Introduction

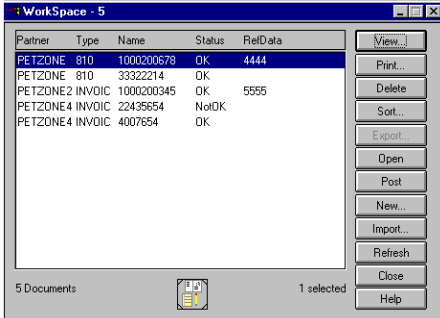
The Post function moves a selected compliant document or group of compliant documents to the Out Documents. A document is compliant if it conforms to the validation rules as defined by the translation object. A document is designated compliant if the Status column contains “OK.” If the Status column contains “NotOk,” the document is *not* compliant and is not posted.

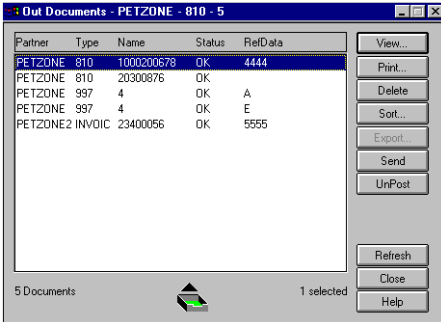
### Note

The Post function can only be used when the Workspace is active.

## Procedure

Complete the following steps to post a document or group of documents:

Step	Action
1	<p>From The Desk, select the Workspace.</p> <p><b>System Response</b> The Workspace browser is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>																														
2	<p>Select the compliant documents that you want to move to the Out Documents.</p> <p><b>Note</b> A document is designated compliant if the Status column contains “OK.” If the Status column contains “NotOk,” the document is <i>not</i> compliant and is not posted.</p>																														
3	<p>Click POST.</p> <p><b>System Response</b> The selected documents are moved to the Out Documents.</p>  <table border="1"><thead><tr><th>Partner</th><th>Type</th><th>Name</th><th>Status</th><th>RefData</th></tr></thead><tbody><tr><td>PETZONE</td><td>810</td><td>1000200678</td><td>OK</td><td>4444</td></tr><tr><td>PETZONE</td><td>810</td><td>203008976</td><td>OK</td><td></td></tr><tr><td>PETZONE</td><td>997</td><td>4</td><td>OK</td><td>A</td></tr><tr><td>PETZONE</td><td>997</td><td>4</td><td>OK</td><td>E</td></tr><tr><td>PETZONE2</td><td>INVOIC</td><td>23400056</td><td>OK</td><td>5555</td></tr></tbody></table>	Partner	Type	Name	Status	RefData	PETZONE	810	1000200678	OK	4444	PETZONE	810	203008976	OK		PETZONE	997	4	OK	A	PETZONE	997	4	OK	E	PETZONE2	INVOIC	23400056	OK	5555
Partner	Type	Name	Status	RefData																											
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PETZONE	810	203008976	OK																												
PETZONE	997	4	OK	A																											
PETZONE	997	4	OK	E																											
PETZONE2	INVOIC	23400056	OK	5555																											

# UnPosting a Document

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## Introduction

The UnPost function moves a selected document or group of documents back to the Workspace. You can use UnPost to prevent a document from being sent to a trading partner or to allow the document to be modified before it is sent. The UnPost function can only be used when Out Documents is the active browser.

### Note

If you modify the document, you must repost before the system can send it.

## Procedure

Complete the following steps to UnPost a document or group of documents:

Step	Action
1	From The Desk, select the Out Documents. <b>System Response</b> The Out Documents Summary dialog box is displayed.
2	Do the following: ■ Select the type of document for the appropriate partner. ■ Click VIEW. <b>System Response</b> The Out Documents browser is displayed.
3	Select the documents that you want to move back to the Workspace.
4	Click UNPOST. <b>System Response</b> The selected documents are moved back to the Workspace.

# Responding to a Document

---

---

## Introduction

The Respond function automatically generates a response document by transferring data from an inbound source document. The Respond function is only available when the In Drawer is the currently selected browser, one or more documents are selected, and Turn Around translation objects exist for the selected documents.

---

## Turnaround documents

The Respond function creates a turnaround document, using the Turn Around translation object from the Partner relationship, in response to the currently selected documents. For instructions, see *Creating a New Inbound Relationship* on page 3 - 31. You can create a turnaround document for non-compliant documents, or documents with a “NotOK” status, as well as compliant documents.

---

## Modifying documents

The documents generated by the turnaround process are placed in the Workspace, where you can modify them prior to sending.

### Note

To modify a document, a Screen Entry translation object must be set up in the outbound relationship for the created document.

### Reference

For instructions on setting up an appropriate screen entry translation object, see *Creating a New Outbound Relationship* on page 3 - 43.

---

---

## Procedure

To respond to one or more documents, complete the following steps:

Step	Action
1	From The Desk, select In Drawer. <b>System Response</b> The In Drawer Summary dialog box is displayed.
2	<ul style="list-style-type: none"> <li>■ Select the type of document for the appropriate partner.</li> <li>■ Click VIEW.</li> </ul> <b>System Response</b> The In Drawer browser is displayed.
3	Select the document or documents for which you want to create a turnaround document.
4	Click RESPOND. <b>System Response</b> <ul style="list-style-type: none"> <li>■ The system automatically creates a turnaround document in response to each document you selected by using the Turn Around translation object that you specified in the Partner relationship.</li> <li>■ The turnaround documents produced are displayed in the Workspace for you to modify, if necessary, before posting to the Out Documents.</li> </ul> <b>Reference</b> For instructions on posting documents, see <i>Posting a Document</i> on page 4 - 35.

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# Importing a Document

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## Introduction

Gentran:Director allows you to import data from data files as an alternative to using the Document Editor to enter data directly into the system. To import a document, you must have a system import and/or import translation object for the transaction set that is imported, registered with the system.

## Reference

For more information on translation object registration, see *Registering (Installing) a New Translation Object* on page 2 - 3.

---

## Additional configuration task

Additionally, for each type of import file, you need to define an import specification on the Import tab in the System Configuration program that indicates which import or system import translation object is used to begin translation during the import process.

Have your system administrator map to a shared folder where the files that you want to import are located.

## Note

Do not use Universal Naming Convention (UNC) paths.

## Reference

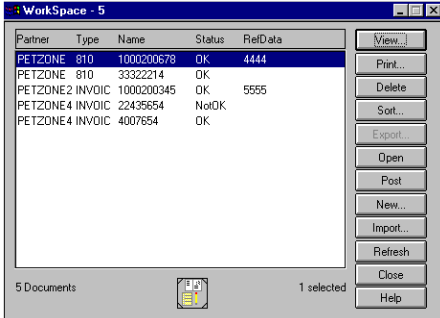
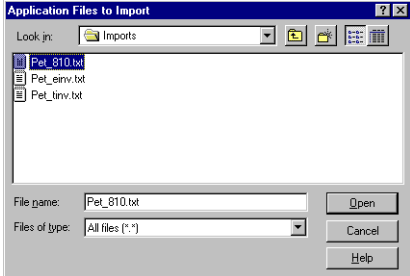
For more information on adding import specifications, see the “Imports Tab” section in the *Administrator's Guide*.

---



**Procedure**

To import a document, complete the following steps:

Step	Action																														
1	<p>From The Desk, select the Workspace.</p> <p><b>System Response</b> The Workspace browser is displayed.</p>  <p>The screenshot shows a window titled 'WorkSpace - 5' with a table containing the following data:</p> <table border="1"> <thead> <tr> <th>Partner</th> <th>Type</th> <th>Name</th> <th>Status</th> <th>RefData</th> </tr> </thead> <tbody> <tr> <td>PETZONE</td> <td>810</td> <td>1000200678</td> <td>OK</td> <td>4444</td> </tr> <tr> <td>PETZONE</td> <td>810</td> <td>33322214</td> <td>OK</td> <td></td> </tr> <tr> <td>PETZONE2</td> <td>INVOIC</td> <td>1000200345</td> <td>OK</td> <td>5555</td> </tr> <tr> <td>PETZONE4</td> <td>INVOIC</td> <td>22435554</td> <td>NotOK</td> <td></td> </tr> <tr> <td>PETZONE4</td> <td>INVOIC</td> <td>4007654</td> <td>OK</td> <td></td> </tr> </tbody> </table> <p>5 Documents      1 selected</p>	Partner	Type	Name	Status	RefData	PETZONE	810	1000200678	OK	4444	PETZONE	810	33322214	OK		PETZONE2	INVOIC	1000200345	OK	5555	PETZONE4	INVOIC	22435554	NotOK		PETZONE4	INVOIC	4007654	OK	
Partner	Type	Name	Status	RefData																											
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PETZONE	810	33322214	OK																												
PETZONE2	INVOIC	1000200345	OK	5555																											
PETZONE4	INVOIC	22435554	NotOK																												
PETZONE4	INVOIC	4007654	OK																												
2	<p>Click IMPORT.</p> <p><b>System Response</b> The Application Files to Import dialog box is displayed.</p>  <p>The screenshot shows a dialog box titled 'Application Files to Import'. The 'Look in:' field is set to 'Imports'. The file list contains:</p> <ul style="list-style-type: none"> <li>Pet_810.txt (selected)</li> <li>Pet_einv.txt</li> <li>Pet_urinv.txt</li> </ul> <p>The 'File name:' field contains 'Pet_810.txt' and the 'Files of type:' dropdown is set to 'All files (*.*)'. Buttons for 'Open', 'Cancel', and 'Help' are visible.</p>																														

*Continued on next page*

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Select the file or files to be imported and click OPEN.</p> <p><b>System Response</b> The documents are imported into the Workspace.</p> <p>The documents either have an “OK” status to indicate that the documents were successfully read and compliance checked or, if the documents failed compliance checking, they are marked as “NotOK.”</p> <p><b>Note</b> You may not send non-compliant documents – either delete those documents and re-process them from the data file, or correct the documents in the Document Editor if you have Screen Entry translation objects for them.</p> <p><b>Reference</b> For more information on correcting the documents in the Document Editor, see <i>Opening and Editing a Document</i> on page 4 - 7.</p> <p><b>Important</b> If you import a file and no documents are displayed in the Workspace, check the Audit Log.</p>

# Exporting a Document

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## Introduction

To export a document to a data file, an export translation object for the transaction set must be loaded into the system and registered, and set up as the Export translation object in the inbound relationship record for the partner.

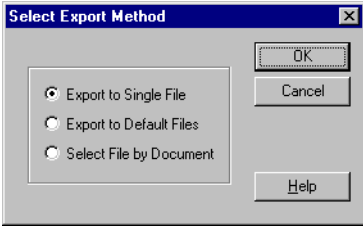
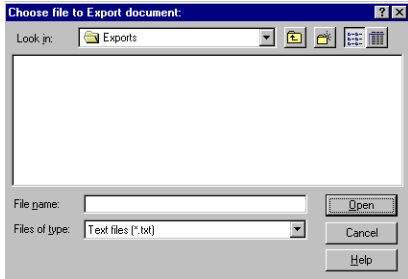
## Reference

- For more information on translation object registration, see *Registering (Installing) a New Translation Object* on page 2 - 3.
- For more information on setting up the Export translation object, see *Creating a New Inbound Relationship* on page 3 - 31.

## Procedure

To export a document, complete the following steps:

Step	Action
1	From The Desk, Select the In Documents, ?In Documents, or In Drawer.  <b>System Response</b> The summary dialog box is displayed for the selected browser.
2	<ul style="list-style-type: none"> <li>■ Select the type of document for the appropriate partner.</li> <li>■ Click VIEW.</li> </ul> <b>System Response</b> The appropriate document browser is displayed.  <i>Continued on next page</i>

<b>(Cont.) Step</b>	<b>Action</b>
3	<ul style="list-style-type: none"><li>■ Select the document or documents that are to be exported.</li><li>■ Click EXPORT.</li></ul> <p><b>System Response</b> The Select Export Method dialog box is displayed.</p> 
4	<p>Select one of the following options and click OK.</p> <ul style="list-style-type: none"><li>■ To convert all selected documents to data and write them to a single file, select the Export to Single File option.</li><li>■ To write selected documents to the files set up in the partner inbound relationship, select the Export to Default Files option.</li><li>■ To rename selected documents, select the Select File by Document option.</li></ul> <p><b>System Response</b> The Choose file to Export document dialog box is displayed.</p> 

# Using Communications

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# Using Communications

## In this chapter

This chapter explains how to use communications with Gentran:Director. For information about stand-alone communications, see *Using Stand-alone Communications* on page 5 - 19.

## Communications feature

The Communications feature enables you to send and receive data from your trading partners. Gentran:Director uses the *Communicator* to handle your communication needs.

## Send process

The following table describes the system process that occurs when you send an interchange:

Stage	Description
1	The documents in the selected interchange are batched into EDI envelopes, and the required control numbers are generated from the information in the partner profile.
2	After the interchange is built, it is listed in the Interchange browser. For instructions on viewing an interchange, see <i>Viewing Interchanges</i> on page 6 - 6.
3	<p>If the communication fails because there is no profile set up, the interchange and documents are left in a “Ready to send” status.</p> <p>If communication fails because there is no modem, the interchange and documents are left in a “Queued” status.</p> <p><b>Note</b></p> <p>No user action is required at this point. Interchanges that failed to send are automatically sent as part of the next transmission session.</p>
4	After communication is successful, the documents are moved to the Out Drawer and the interchange status is set to “Sent.”

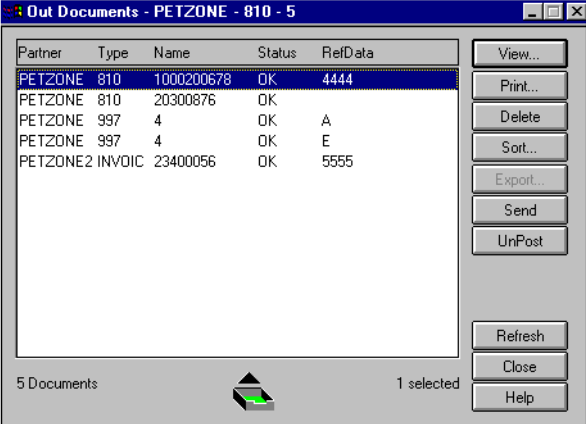
# Sending a Document

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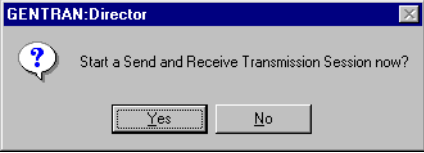
## Procedure

To send a selected document or set of documents, complete the following steps:

<b>Step</b>	<b>Action</b>
1	<p>From The Desk, select Out Documents.</p> <p><b>System Response</b> The Out Documents Summary dialog box is displayed.</p> <p><b>Note</b> If the documents to be sent are not in Out Documents, you must post the documents from the Workspace to Out Documents.</p> <p><b>Reference</b> For instructions on posting, see <i>Posting a Document</i> on page 4 - 35.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

(Cont.) Step	Action																														
<p>2</p>	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select the type of document for the partner.</li> <li>■ Click VIEW.</li> </ul> <p><b>System Response</b></p> <p>The Out Documents browser is displayed.</p>  <table border="1" data-bbox="557 520 1001 841"> <thead> <tr> <th>Partner</th> <th>Type</th> <th>Name</th> <th>Status</th> <th>RefData</th> </tr> </thead> <tbody> <tr style="background-color: #e0e0e0;"> <td>PETZONE</td> <td>810</td> <td>1000200678</td> <td>OK</td> <td>4444</td> </tr> <tr> <td>PETZONE</td> <td>810</td> <td>20300876</td> <td>OK</td> <td></td> </tr> <tr> <td>PETZONE</td> <td>997</td> <td>4</td> <td>OK</td> <td>A</td> </tr> <tr> <td>PETZONE</td> <td>997</td> <td>4</td> <td>OK</td> <td>E</td> </tr> <tr> <td>PETZONE2</td> <td>INVOIC</td> <td>23400056</td> <td>OK</td> <td>5555</td> </tr> </tbody> </table>	Partner	Type	Name	Status	RefData	PETZONE	810	1000200678	OK	4444	PETZONE	810	20300876	OK		PETZONE	997	4	OK	A	PETZONE	997	4	OK	E	PETZONE2	INVOIC	23400056	OK	5555
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PETZONE	997	4	OK	E																											
PETZONE2	INVOIC	23400056	OK	5555																											
<p>3</p>	<p>Select the document or documents that need to be sent.</p> <p><b>Note</b></p> <p>To select a group of documents click the first document, press <b>SHIFT</b>, and click the last document. To select several documents that are not adjacent to each other in the Out Documents list, press and hold <b>CTRL</b> while clicking each document.</p> <p style="text-align: right;"><i>Continued on next page</i></p>																														



<b>(Cont.) Step</b>	<b>Action</b>
4	<p>Click SEND.</p> <p><b>System Response</b> The Gentrans:Director dialog box is displayed.</p> 
5	Click YES to start the transmission session.

# Sending All Documents

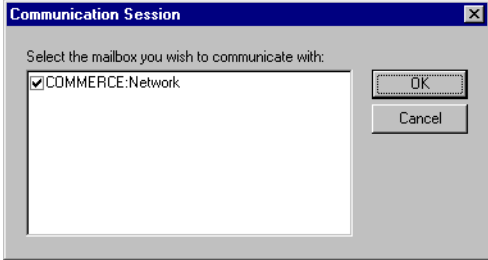
## Introduction

You can send all the documents in Out Documents using one of the following methods:

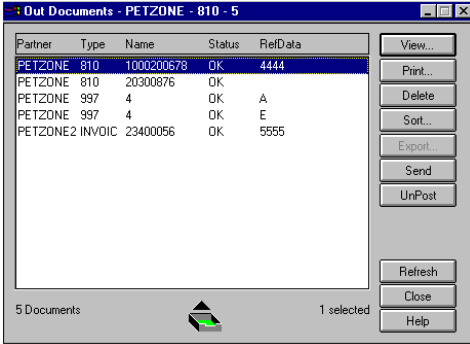
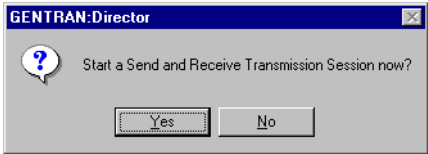
- Selecting the Transmit icon on The Desk.
- Accessing the Out Drawer browser and clicking SEND.

## Procedure

To send all documents, complete one of the following sets of instructions:

Step	Action
<b>Method 1</b>	
1	<p>From The Desk, click the Transmit icon.</p> <p><b>System Response</b> The Communication Session dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
2	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select one or more profiles for which you want to send data.</li> <li>■ Click OK to start a communication session to send data. Click CANCEL if you want to cancel the transmission session.</li> </ul> <p><b>Note</b></p> <p>All documents currently located in the Out Documents, for which the partner is using one of the selected profiles, is sent.</p> <p>If there are no documents in the Out Documents or interchanges with a “Ready” status in the Interchanges browser, a receive-only session is performed and the In Documents and ?In Documents are updated with any data received.</p>
<b>Method 2</b>	
1	<p>From The Desk, select Out Documents.</p> <p><b>System Response</b></p> <p>The Out Documents Summary dialog box is displayed.</p> <p><b>Note</b></p> <p>If the documents to be sent are not in Out Documents, you must post the documents from the Workspace to Out Documents.</p> <p><b>Reference</b></p> <p>For instructions on posting, see <i>Posting a Document</i> on page 4 - 35.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

(Cont.) Step	Action
<p>2</p>	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select the type of document for the partner.</li> <li>■ Click VIEW.</li> </ul> <p><b>System Response</b></p> <p>The Out Documents browser is displayed.</p> 
<p>3</p>	<p>Do not select any documents. If any documents are selected, press <b>CTRL</b> and click on the documents to deselect them.</p>
<p>4</p>	<p>Click SEND.</p> <p><b>System Response</b></p> <p>The Gentrans:Director dialog box is displayed.</p> 
<p>5</p>	<p>Click YES to start the transmission session.</p> <p><b>Note</b></p> <p>All the documents in the Out Documents are sent to the appropriate profiles.</p>

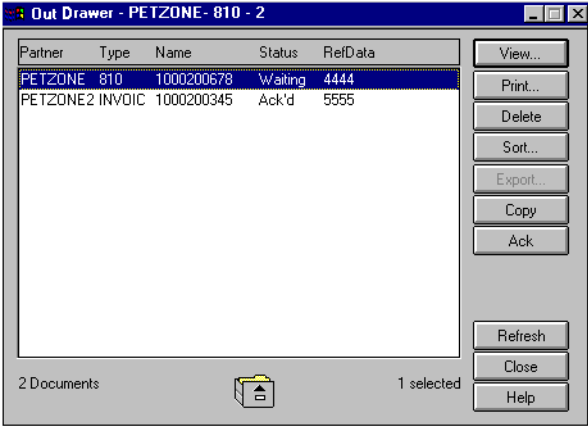
# Resending a Document

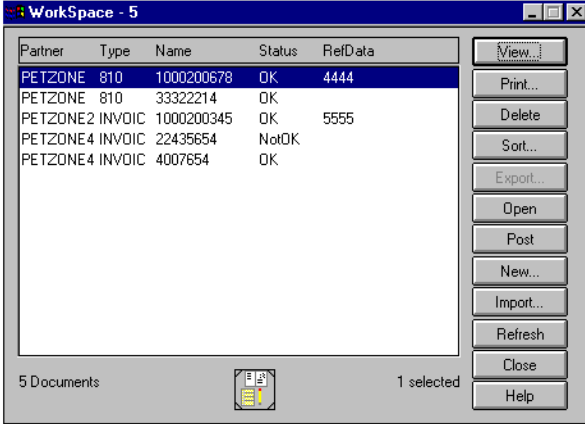
## Introduction

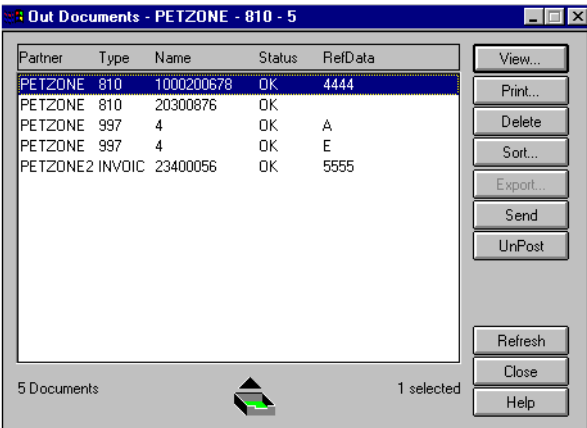
After a document is successfully enveloped and sent, it is stored in the Out Drawer. If you need to resend the document, you must make a new copy of the document and execute the Send process again.

## Procedure

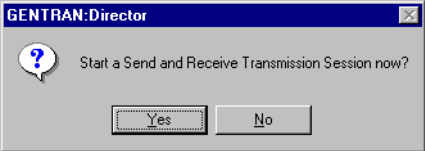
To resend a document, complete the following steps:

Step	Action															
1	From The Desk, select Out Drawer. <b>System Response</b> The Out Drawer Summary dialog box is displayed.															
2	Do the following: <ul style="list-style-type: none"> <li>■ Select the type of document for the partner.</li> <li>■ Click VIEW.</li> </ul> <b>System Response</b> The Out Drawer browser is displayed. <div data-bbox="596 1055 1184 1482" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  <p>The screenshot shows a window titled "Out Drawer - PETZONE- 810 - 2". It contains a table with the following data:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Partner</th> <th>Type</th> <th>Name</th> <th>Status</th> <th>RefData</th> </tr> </thead> <tbody> <tr> <td>PETZONE</td> <td>810</td> <td>1000200678</td> <td>Waiting</td> <td>4444</td> </tr> <tr> <td>PETZONE2 INVOIC</td> <td></td> <td>1000200345</td> <td>Ack'd</td> <td>5555</td> </tr> </tbody> </table> <p>Below the table, it says "2 Documents" and "1 selected". To the right of the table are several buttons: View..., Print..., Delete, Sort..., Export..., Copy, Ack, Refresh, Close, and Help.</p> </div> <p style="text-align: right;"><i>Continued on next page</i></p>	Partner	Type	Name	Status	RefData	PETZONE	810	1000200678	Waiting	4444	PETZONE2 INVOIC		1000200345	Ack'd	5555
Partner	Type	Name	Status	RefData												
PETZONE	810	1000200678	Waiting	4444												
PETZONE2 INVOIC		1000200345	Ack'd	5555												

<b>(Cont.) Step</b>	<b>Action</b>																														
3	<p>Select the document or documents that need to be resent.</p> <p><b>Note</b></p> <p>To select a group of documents click the first document, press <b>SHIFT</b>, and click the last document. To select several documents that are not adjacent to each other in the Out Drawer list, press and hold <b>CTRL</b> while clicking each document.</p>																														
4	<p>Click <b>COPY</b>.</p> <p>A copy of the documents is made and placed in the Workspace.</p>																														
5	<p>From The Desk, select Workspace.</p> <p><b>System Response</b></p> <p>The Workspace browser is displayed.</p>  <p>The screenshot shows a window titled "WorkSpace - 5" with a table of documents and a list of actions on the right. The table has columns: Partner, Type, Name, Status, and RefData. The first row is selected.</p> <table border="1" data-bbox="568 835 1009 1156"> <thead> <tr> <th>Partner</th> <th>Type</th> <th>Name</th> <th>Status</th> <th>RefData</th> </tr> </thead> <tbody> <tr> <td>PETZONE</td> <td>810</td> <td>1000200678</td> <td>OK</td> <td>4444</td> </tr> <tr> <td>PETZONE</td> <td>810</td> <td>33322214</td> <td>OK</td> <td></td> </tr> <tr> <td>PETZONE2</td> <td>INVOIC</td> <td>1000200345</td> <td>OK</td> <td>5555</td> </tr> <tr> <td>PETZONE4</td> <td>INVOIC</td> <td>22435654</td> <td>NotOK</td> <td></td> </tr> <tr> <td>PETZONE4</td> <td>INVOIC</td> <td>4007654</td> <td>OK</td> <td></td> </tr> </tbody> </table> <p>5 Documents      1 selected</p> <p>Actions: View..., Print..., Delete, Sort..., Export..., Open, Post, New..., Import..., Refresh, Close, Help</p>	Partner	Type	Name	Status	RefData	PETZONE	810	1000200678	OK	4444	PETZONE	810	33322214	OK		PETZONE2	INVOIC	1000200345	OK	5555	PETZONE4	INVOIC	22435654	NotOK		PETZONE4	INVOIC	4007654	OK	
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PETZONE4	INVOIC	22435654	NotOK																												
PETZONE4	INVOIC	4007654	OK																												
6	<p>Make any necessary changes to the documents.</p> <p><b>Note</b></p> <p>You can modify a document only if there is a Data Entry translation object for the partner relationship.</p> <p style="text-align: right;"><i>Continued on next page</i></p>																														

<b>(Cont.) Step</b>	<b>Action</b>																														
7	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select the documents.</li> <li>■ Click POST.</li> </ul> <p><b>System Response</b> The documents are posted to the Out Documents browser.</p>																														
8	<p>From The Desk, select Out Documents.</p> <p><b>System Response</b> The Out Documents Summary dialog box is displayed.</p>																														
9	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select the type of document for the partner.</li> <li>■ Click VIEW.</li> </ul> <p><b>System Response</b> The Out Documents browser is displayed.</p>  <p>The screenshot shows a window titled "Out Documents - PETZONE - 810 - 5". Inside, there is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Partner</th> <th>Type</th> <th>Name</th> <th>Status</th> <th>RefData</th> </tr> </thead> <tbody> <tr> <td>PETZONE</td> <td>810</td> <td>1000200678</td> <td>OK</td> <td>4444</td> </tr> <tr> <td>PETZONE</td> <td>810</td> <td>20300876</td> <td>OK</td> <td></td> </tr> <tr> <td>PETZONE</td> <td>997</td> <td>4</td> <td>OK</td> <td>A</td> </tr> <tr> <td>PETZONE</td> <td>997</td> <td>4</td> <td>OK</td> <td>E</td> </tr> <tr> <td>PETZONE2</td> <td>INVOIC</td> <td>23400056</td> <td>OK</td> <td>5555</td> </tr> </tbody> </table> <p>Below the table, it indicates "5 Documents" and "1 selected". On the right side of the window, there are buttons for View..., Print..., Delete, Sort..., Export..., Send, and UnPost. At the bottom right, there are buttons for Refresh, Close, and Help.</p>	Partner	Type	Name	Status	RefData	PETZONE	810	1000200678	OK	4444	PETZONE	810	20300876	OK		PETZONE	997	4	OK	A	PETZONE	997	4	OK	E	PETZONE2	INVOIC	23400056	OK	5555
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PETZONE	997	4	OK	A																											
PETZONE	997	4	OK	E																											
PETZONE2	INVOIC	23400056	OK	5555																											

*Continued on next page*

<b>(Cont.) Step</b>	<b>Action</b>
10	<p>Do the following:</p> <ul style="list-style-type: none"><li>■ Select the documents.</li><li>■ Click SEND.</li></ul> <p><b>System Response</b></p> <p>The Gentran:Director dialog box is displayed.</p> 
11	Click YES to start the transmission session.



# Receiving a Document

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## Introduction

Any time a Send session is executed, the system automatically checks your Mailbox for any information waiting to be received. If any data is in the Mailbox, it is received without any action from you.

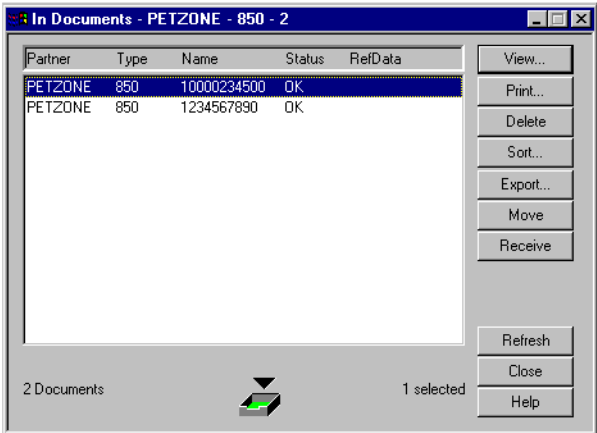
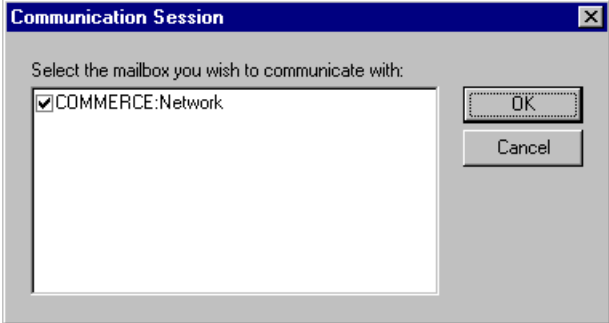
If you need to receive information without first sending anything, you must initiate a receive-only session using one of the following methods:

- Selecting the Receive command from the Commands menu.
- Accessing the In Documents browser and clicking RECEIVE.

## Procedure

To start a receive-only session, complete one of the following sets of instructions.:

Step	Action
<b>Method 1</b>	
1	From the Commands menu, select Receive. <b>System Response</b> The system initiates a receive-only session.
<b>Method 2</b>	
1	From the Tools menu, select In Documents. <b>System Response</b> The In Documents Summary dialog box is displayed.
<i>Continued on next page</i>	

(Cont.) Step	Action
<p>2</p>	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select the type of document for the partner.</li> <li>■ Click VIEW.</li> </ul> <p><b>System Response</b> The In Documents browser is displayed.</p> 
<p>3</p>	<p>Click RECEIVE.</p> <p><b>System Response</b> The Communication Session dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
4	<p>Do the following:</p> <ul style="list-style-type: none"><li>■ Select one or more profiles for which you want to send data.</li><li>■ Click OK to start a communication session to send data. Click CANCEL if you want to cancel the transmission session.</li></ul> <p><b>Note</b></p> <p>This action initiates a receive-only session and updates the In Documents or ?In Documents with any data received as a result of that session.</p>

---

# Viewing the Send Queue

## Introduction

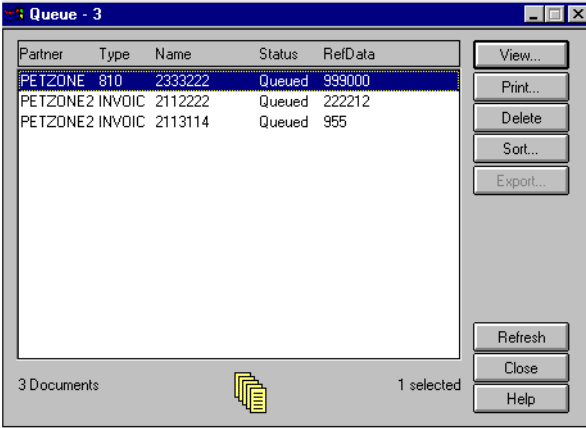
The Send Queue displays a list of documents that are currently queued to be sent, and enables you to perform document-based tasks similar to those available in the main system browsers.

### Note

The Send Queue contains documents only if a transmission session failed. The documents remain in the Send Queue until a successful transmission session occurs; no user intervention is required.

## Procedure

To view the Send Queue, complete the following steps:

Step	Action
1	<p>From the View menu, select Send Queue.</p> <p><b>System Response</b> The Send Queue browser is displayed.</p> 
2	<p>Select a document or a group of documents.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
3	Use the command buttons on the Send Queue browser to perform the following functions:	
	<b>IF you want to...</b>	<b>THEN click...</b>
	view the content of a <ul style="list-style-type: none"> <li>■ single selected document in raw EDI data,</li> <li>■ formatted document,</li> <li>■ translation report,</li> </ul>	VIEW
	print the selected documents or summary of the documents,	PRINT
	delete the selected documents,	DELETE
	sort the displayed columns in the document list,	SORT

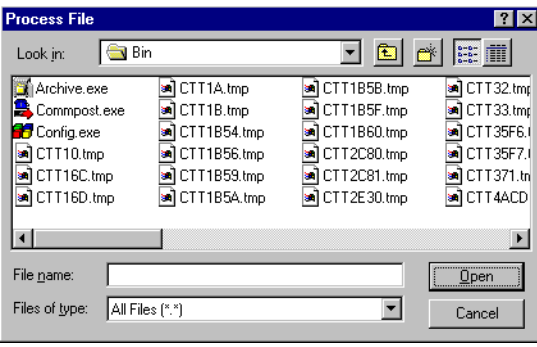
# Processing Data Files

## Introduction

The Process File feature invokes the post-communications process with any data file, just as if the file was received through a communication session. This enables you to process a data file from a diskette or anywhere on your system.

## Procedure

To send a data file to the Communicator, complete the following steps:

Step	Action
1	<p>From the Commands menu, select Process File.</p> <p><b>System Response</b> The Process File dialog box is displayed.</p>  <p>The screenshot shows a 'Process File' dialog box with a 'Look in:' field set to 'Bin'. The file list contains various files including Archive.exe, Compost.exe, Config.exe, and several CTT*.tmp files. At the bottom, there is a 'File name:' field, a 'Files of type:' dropdown set to 'All Files (*.*)', and 'Open' and 'Cancel' buttons.</p>
2	<p>Select the data file, and then click OPEN.</p> <p><b>System Response</b> The system immediately invokes the post-communications process with the file, just as if the file was received through a communication session.</p>

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# Using Stand-alone Communications

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## Introduction

A stand-alone communications module is provided with Gentran:Director. The program SENDFILE.exe is used to browse and select a communications profile, such as Commerce:Exchange. It can also be used to test communications, and is recommended for use when changing a password or getting quick reports.

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## SENDFILE.exe program

The SENDFILE.exe program can be run from Gentran:Director program group. To launch the program, from the Windows start menu select **Programs>Commerce:Connection>Send file**. The Communication Options dialog box is displayed.

The screenshot shows the 'Communication Options' dialog box. It features a title bar with a close button. The main area contains the following elements:

- Filename to send:** A text input field followed by a 'Browse...' button.
- Profile to use:** A dropdown menu.
- Required if sending to Advantis:** A group box containing two text input fields: 'Receiver's Advantis ACCOUNTID:' and 'Receiver's Advantis USERID:'.
- Required if sending to an OFTP network:** A group box containing one text input field: 'Receiver's OFTP ID:'.
- Buttons:** 'OK' and 'Cancel' buttons are located at the bottom right of the dialog.

# Managing Communication Port Profiles

## Creating and Editing Communication Port Profiles

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### Introduction

A *communication port* is the physical serial port on your PC to which your modem is connected. You must have at least one port definition on your system for the Communicator to run. However, you can configure as many definitions of the four communication ports (COM1, COM2, COM3, and COM4) on your system as necessary. The port profiles you establish can also be copied and modified, if necessary.

### Note

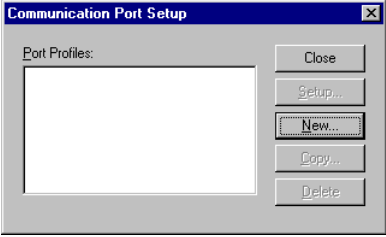
If you have one modem, you can only configure the physical port to which the modem is attached. However, Gentran:Director enables you to set up multiple port profiles for each physical communication port. This enables you to define:

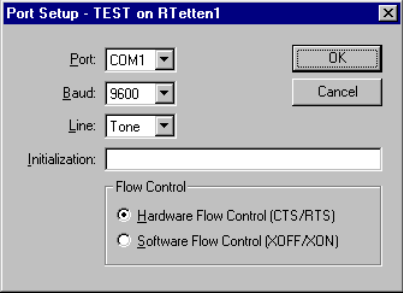
- Different modem speeds and initialization strings for the same port.
  - Specific definitions for each network you will be accessing.
-



**Procedure**

To create or edit a communication port profile, complete the following steps:

Step	Action
1	<p>From the Tools menu:</p> <ul style="list-style-type: none"> <li>■ Select Communications.</li> <li>■ Select Ports from the Communications submenu.</li> </ul> <p><b>System Response</b> The Communication Port Setup dialog box is displayed.</p> 
2	<p>Do you want to create or modify a new port profile?</p> <ul style="list-style-type: none"> <li>■ If you want to create a new profile, click NEW and continue with step 3.</li> </ul> <p><b>System Response</b> The New Port Profile dialog box is displayed.</p> <ul style="list-style-type: none"> <li>■ If you want to edit an existing profile, select the port profile you want to modify, click SETUP, and continue with step 4.</li> </ul> <p><b>System Response</b> The Port Setup dialog box is displayed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.</b>	<b>Action</b>
<p>3</p>	<ul style="list-style-type: none"> <li>■ In the Name box, type a unique name for the new port profile.</li> <li>■ Click OK and continue with step 4.</li> </ul> <p><b>System Response</b></p> <p>The Port Setup dialog box is displayed.</p> 
<p>4</p>	<p>From the Port drop-down list, select the serial port to which your modem is connected on this communication controller.</p> <p><b>Values</b></p> <ul style="list-style-type: none"> <li>■ COM1</li> <li>■ COM2</li> <li>■ COM3</li> <li>■ COM4</li> </ul> <p><b>Note</b></p> <p>The system uses this port to send data to and from your modem.</p>
<p>5</p>	<p>From the Baud drop-down list, select the baud rate of your modem.</p> <p><b>Values</b></p> <ul style="list-style-type: none"> <li>■ 1200</li> <li>■ 2400</li> <li>■ 9600</li> <li>■ 19200</li> <li>■ 28400</li> </ul> <p><b>Note</b></p> <p>The baud rate is the transmission speed of the modem line. The default baud rate is “19200.” If you are unsure about the rate at which your modem operates, refer to the operations manual for your modem.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

---

<b>(Cont.)</b>	<b>Action</b>
6	<p>From the Line drop-down list, select the telephone dialing method that your modem will use.</p> <p><b>Values</b></p> <ul style="list-style-type: none"><li>■ <b>Tone</b> - touch tone leased dialing. This is the default.</li><li>■ <b>Pulse</b> - pulse dialing.</li></ul>
7	<p>In the Initialization box, type the command(s) to initialize your modem.</p> <p><b>Note</b></p> <p>These commands will vary depending on your modem's type. If you do not know the modem initialization command(s), refer to the operations manual for your modem.</p>
8	<p>Select the flow control option that corresponds to the flow control commands you set on your modem.</p> <p><b>Note</b></p> <p>These options control the flow of information from your PC to your modem, and from your modem to your PC.</p>
9	<p>Click OK.</p> <p><b>System Response</b></p> <p>The port profile setup is saved and the Communication Port Setup dialog box is displayed.</p> <p>Click CLOSE to exit the Communication Port Setup dialog box</p>

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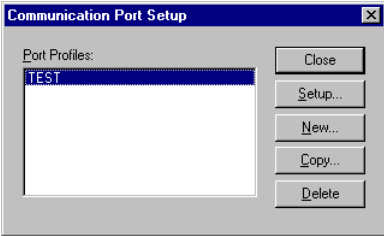
# Copying Communication Port Profiles

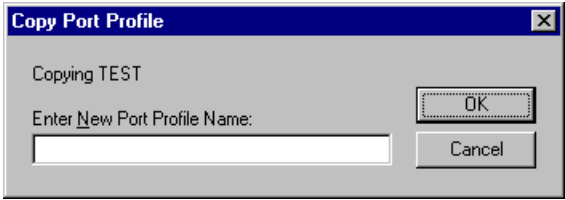
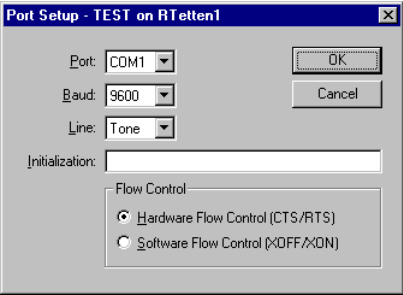
## Introduction

The copy port profile feature allows you to save a port profile as a different name and make modifications to that port profile. This keeps you from having to create a new port profile from scratch.<sup>7</sup>

## Procedure

To copy a communication port profile, complete the following steps:

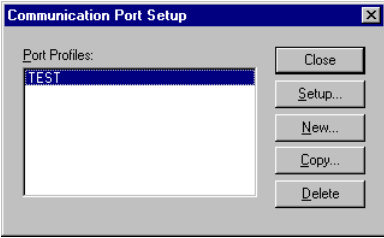
Step	Action
1	<p>From the Tools menu:</p> <ul style="list-style-type: none"> <li>■ Select Communications.</li> <li>■ Select Ports from the Communications submenu.</li> </ul> <p><b>System Response</b> The Communication Port Setup dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
2	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select the port profile you want to copy.</li> <li>■ Click COPY.</li> </ul> <p><b>System Response</b></p> <p>The Copy Port Profile dialog box is displayed.</p> 
3	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Type a new port profile name.</li> <li>■ Click OK.</li> </ul> <p><b>System Response</b></p> <p>The port is copied under the new name and the Port Setup dialog box is displayed.</p> 
4	<p>Make the appropriate modification to the port profile.</p> <p><b>Reference</b></p> <p>For more information on modifying communication port profiles, see <i>Procedure</i> on page 5 - 21.</p>

# Deleting Communication Port Profiles

## Procedure

To delete a communication port profile, complete the following steps:

Step	Action
1	<p>From the Tools menu:</p> <ul style="list-style-type: none"> <li>■ Select Communications.</li> <li>■ Select Ports from the Communications submenu.</li> </ul> <p><b>System Response</b> The Communication Port Setup dialog box is displayed.</p> 
2	<ul style="list-style-type: none"> <li>■ Select the port profile you want to delete.</li> <li>■ Click DELETE.</li> </ul> <p><b>System Response</b> The system prompts you to confirm the delete operation.</p>
3	<p>Click YES to remove the port profile.</p>

# Using Communication Profiles

## Creating and Editing Communication Profiles

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### Introduction

The *communication profile* contains all of the relevant information needed to establish a communication session. You must define at least one communication profile on your system, but you can define multiple communication profiles, if necessary.

You need to create a new communication profile if you will be using another network or communicating directly with your trading partners.

A communication profile must be linked to a partner profile in Partner Editor before the Communicator can use that profile to communicate.

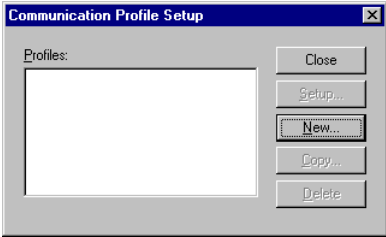
### Reference

For more information on linking a communication profile to a partner profile, see *Creating a New Partner Definition* on page 3 - 28.

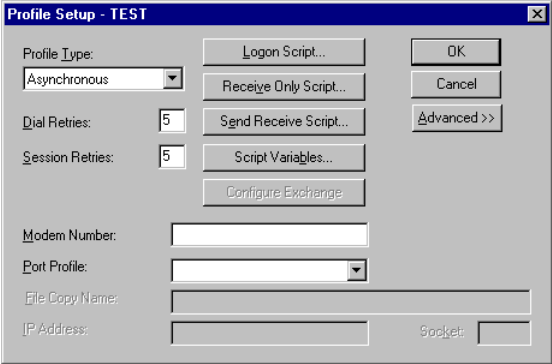
---

**Procedure**

To create or edit a communication profile, complete the following steps:

Step	Action
1	<p>From the Tools menu:</p> <ul style="list-style-type: none"> <li>a. Select Communications.</li> <li>b. Select Profile from the Communications submenu.</li> </ul> <p><b>System Response</b> The Communication Profile Setup dialog box is displayed.</p> 
3	<p>Do you want to create or modify a communication profile?</p> <ul style="list-style-type: none"> <li>■ If you want to create a new profile, click NEW and continue with step 3.</li> </ul> <p><b>System Response</b> The New Profile dialog box is displayed.</p> <ul style="list-style-type: none"> <li>■ If you want to edit an existing profile, select the profile you want to modify, click SETUP and continue with step 4.</li> </ul> <p><b>System Response</b> The Profile Setup dialog box is displayed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>



<b>(Cont.) Step</b>	<b>Action</b>
4	<p>In the Name box, type the unique name of the new communication profile. Then, click OK and continue with step 4.</p> <p><b>System Response</b> The Profile Setup dialog box is displayed.</p> 
5	<p>From the Profile Type drop-down list, select a type for the communication profile.</p> <p><b>Values</b></p> <ul style="list-style-type: none"> <li>■ Asynchronous - this is the default.</li> <li>■ Bisynchronous</li> <li>■ Commerce:Exchange</li> <li>■ File Copy</li> <li>■ TCP/IP</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
6	Complete the boxes that are activated. Fields on this dialog box are activated or deactivated depending on which Profile Type you select. The following list describes the fields on the Profile Setup dialog box.	
	<b>Field</b>	<b>Definition</b>
	Dial Retries	Allows you to specify the number of times you want the system to redial the host (network) modem number if the host modem is busy or does not respond.  <b>Note</b> You can specify any number of redial times up to 99.
	Session Retries	Allows you to specify the number of times you want the system to initiate a host (network) session if a session-related error occurs.  <b>Note</b> You can specify any number of redial times up to 99.
	Modem Number	Allows you to specify the phone number of the host (network) modem.  <b>Note</b> You will need to define the exact number that the system needs to dial. Therefore, if the system must dial a 9 (or other number) to reach an outside phone line, you must include that prefix in this field. Follow the prefix with a comma before the phone number. For example, 9,16145550000.
	Port Profile	Allows you to select the port profile.
	File Copy Name	Allows you to specify the path and filename of the file to which the output of the communication session is written.
	IP Address	Allows you to type the destination IP Address in dotted decimal notation. For example, 199.3.19.29.
	Socket	Allows you to type the socket number for the destination network. For example, 3244.  <i>Continued on next page</i>

<b>(Cont.) Step</b>	<b>Action</b>
7	<p>Did you select a Profile Type of Asynchronous, Bisynchronous, or TCP/IP?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, continue with the “Creating a logon script” section of this table.</li> <li>■ If <i>no</i>, continue with the “Configuring Commerce:Exchange” section of this table.</li> </ul>
<b>Creating a logon script</b>	
1	<p>For Asynchronous, Bisynchronous, or TCP/IP profile types, click LOGON SCRIPT.</p> <p><b>System Response</b> The Logon Script window is displayed.</p>
2	<p>Do you currently have a logon script on your system that you could import and modify, instead of creating a new script?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, click IMPORT! to import the logon script.</li> <li>■ If <i>no</i>, type the necessary script commands and variables in the Logon Script window.</li> </ul> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>■ Sterling Commerce provides predefined scripts when you install Gentran:Director. You can continue importing scripts until you find the script with appropriate comments. The system overlays the previous script each time you import. You can modify the chosen script (if necessary) and save it, instead of creating your own script.</li> <li>■ If you are going to be creating your own script, see <i>Communicator Script Language</i> in the online Help for more information.</li> <li>■ If the predefined script contains substitution variables, you only need to provide the variable values on the Script Variable Substitution dialog box. For more information, see <i>Substituting Script Variables</i> on page 5 - 44.</li> </ul>
3	<p>When you finish creating or importing the script, click SAVE!.</p> <p><b>Note</b> When you modify a predefined script, we strongly recommend that you use the Save As! function to save it as a different name. Otherwise, the script could be overwritten when you install a new version of Gentran:Director. The default file extension for scripts is “.SCR”.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
<b>Creating a receive only script</b>	
1	<p>For Asynchronous, Bisynchronous, or TCP/IP profile types, click RECEIVE ONLY SCRIPT.</p> <p><b>System Response</b> The Receive Only Script window is displayed.</p>
2	<p>Do you have a receive only script on your system that you could import and modify, instead of creating a new script?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, click IMPORT! to import the receive only script.</li> <li>■ If <i>no</i>, type the necessary script commands and variables in the Receive Only Script window.</li> </ul> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>■ Sterling Commerce provides predefined scripts when you install Gentran:Director. You can continue importing scripts until you find the script with appropriate comments. The system overlays the previous script each time you import. You can modify the chosen script if necessary and save it, instead of creating your own script.</li> <li>■ If you are going to be creating your own script, see <i>Communicator Script Language</i> in the online Help for more information.</li> <li>■ If the predefined script contains substitution variables, you only need to provide the variable values on the Script Variable Substitution dialog box. For more information, see <i>Substituting Script Variables</i> on page 5 - 44.</li> </ul>
3	<p>When you finish creating or importing the script, click SAVE!.</p> <p><b>Note</b> When you modify a predefined script, we strongly recommend that you use the Save As! function to save it as a different name. Other wise, the script could be overwritten when you install a new version of Gentran:Director. The default file extension for scripts is “.SCR”.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
<b>Creating a send receive script</b>	
1	<p>For Asynchronous, Bisynchronous, or TCP/IP profile types, click SEND RECEIVE SCRIPT.</p> <p><b>System Response</b> The Send Receive Script window is displayed.</p>
2	<p>Do you have a send receive script on your system that you could import and modify, instead of creating a new script?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, click IMPORT! to import the send receive script.</li> <li>■ If <i>no</i>, type the necessary script commands and variables in the Send Receive Script window.</li> </ul> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>■ Sterling Commerce provides predefined scripts when you install Gentran:Director. You can continue importing scripts until you find the script with appropriate comments. The system overlays the previous script each time you import. You can modify the chosen script (if necessary) and save it, instead of creating your own script.</li> <li>■ If you are going to be creating your own script, see <i>Communicator Script Language</i> in the online Help for more information.</li> <li>■ If the predefined script contains substitution variables, you only need to provide the variable values on the Script Variable Substitution dialog box. For more information, see <i>Substituting Script Variables</i> on page 5 - 44.</li> </ul>
3	<p>When you finish creating or importing the script, click SAVE! to save the script for this profile.</p> <p><b>Note</b></p> <p>When you modify a predefined script, we strongly recommend that you use the Save As! function to save it as a different name. Otherwise, the script could be overwritten when you install a new version of Gentran:Director. The default file extension for scripts is “.SCR”.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

(Cont.) Step	Action					
<b>Configuring Commerce:Exchange</b>						
1	<p>Did you select a Profile Type of Commerce:Exchange?</p> <ul style="list-style-type: none"> <li>■ If <i>no</i>, continue with the “Setting advanced options” section of this table.</li> </ul> <p><b>System Response</b> The Commerce:Exchange dialog box is displayed.</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, click CONFIGURE EXCHANGE to configure those options.</li> </ul> <p><b>Reference</b> For more information, see the Mailboxes section in chapter 7 (Connection Manager) of the <i>Commerce:Connection<sup>®</sup> for the Internet User Guide</i>.</p>					
<b>Setting advanced options (processor and tracing)</b>						
1	<p>On the Profile Setup dialog box, click ADVANCED&gt;&gt;.</p> <p><b>System Response</b> The fields defined below are appended to the Profile Setup dialog box.</p> <p><b>Note</b> If your data needs to be in a specific format, you can use the XPROCESS utility program to manipulate the data you send. For information on how to use the XPROCESS program, see <i>XPROCESS Utility Program</i> on page 5 - 37.</p>					
	<table border="1"> <thead> <tr> <th data-bbox="224 1015 537 1060">Field</th> <th data-bbox="542 1015 1185 1060">Definition</th> </tr> </thead> <tbody> <tr> <td data-bbox="224 1060 537 1444">Pre-Processor</td> <td data-bbox="542 1060 1185 1444"> <p>Enables you to specify a program name with arguments that are called for every file to be sent. Each send filespec will be appended to the command line.</p> <p><b>Example</b> You can specify a program to be run against every file to be sent before communication starts.</p> <p><b>Note</b> This option will not work if you have selected Commerce:Exchange as the Profile Type.</p> <p style="text-align: right;"><i>Continued on next page</i></p> </td> </tr> </tbody> </table>	Field	Definition	Pre-Processor	<p>Enables you to specify a program name with arguments that are called for every file to be sent. Each send filespec will be appended to the command line.</p> <p><b>Example</b> You can specify a program to be run against every file to be sent before communication starts.</p> <p><b>Note</b> This option will not work if you have selected Commerce:Exchange as the Profile Type.</p> <p style="text-align: right;"><i>Continued on next page</i></p>	
Field	Definition					
Pre-Processor	<p>Enables you to specify a program name with arguments that are called for every file to be sent. Each send filespec will be appended to the command line.</p> <p><b>Example</b> You can specify a program to be run against every file to be sent before communication starts.</p> <p><b>Note</b> This option will not work if you have selected Commerce:Exchange as the Profile Type.</p> <p style="text-align: right;"><i>Continued on next page</i></p>					

<b>(Cont.) Step</b>	<b>Action</b>	
1 (cont.)	Pre-Post Processor	<p>Enables you to specify a program name with arguments that will be called for every file received. Each receive filespec will be appended to the command line.</p> <p><b>Example</b> You can specify a program that will be run against every file received before the post-processor processes it.</p> <p><b>Note</b> This option will not work if you have selected Commerce:Exchange as the Profile Type.</p>
	Post Processor	<p>Enables you to specify the program that will process the received data.</p> <p><b>Example</b> You can specify a program that will process all received data in the system and update the status.</p> <p><b>Caution</b> Do <i>not</i> change the default value “commpost.exe” unless you are instructed to do so by Gentran:Director Customer Support.</p>
	Trace1	<p>Enables a “datascope” trace that shows every byte sent or received during a session.</p> <p><b>Warning</b> If Trace1 or Trace2 is enabled, the trace information is written to the communication log file. You should <i>only</i> select the Trace1 and/or Trace2 check box to debug communication problems. Clear these check boxes once the problem is resolved.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
1 (cont.)	Trace2	<p>Enables a function level trace to show every function called during a session.</p> <p><b>Warning</b> If Trace1 or Trace2 is enabled, the trace information will be written to the communication log file. You should <i>only</i> select the Trace1 and/or Trace2 check box to debug communication problems. You should clear these check boxes once the problem is resolved.</p> <p><b>Note:</b> Windows NT and 2000 users must select Trace 2 for the communication session to run properly.</p>
<b>Saving the communication profile</b>		
1	<p>Click OK.</p> <p><b>System Response</b> The profile setup is saved and the Communication Profile Setup dialog box is displayed.</p>	
2	<p>Click CLOSE.</p> <p><b>System Response</b> The Communication Profile Setup dialog box is closed.</p>	



# XPROCESS Utility Program

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## Introduction

The XPROCESS utility program enables you to manipulate data that you send or receive into a specific format.

If you specify this program in the **Pre-Processor field** of the Profile Setup dialog box (Advanced section), it will manipulate the data you send based on the specified options.

If you specify this program in the **Pre-Post Processor field** of the Profile Setup dialog box (Advanced section), it will manipulate the data that was received based on the specified options.

When you specify the XPROCESS program in either the Pre-Processor or Pre-Post Processor field, you must also specify an option using the following format: XPROCESS - n (n = value from 0 to 13). See below for a list of options.

## XPROCESS Options

The available XPROCESS program options are listed in the following table:

### Note

For the options listed below, you only need to specify a **[filename]** if you are running XPROCESS from a command line.

Option	Definition	What you type
-0	Converts any specified hex character to any other specified hex character.  The syntax for the hex values is "0x" followed by the hex code. For example, for hexadecimal A, you would type "0x41".	<b>XPROCESS -0</b> <b>[hexValue1] [hexValue2]</b> <b>[filename]</b>
-1	Appends the file you specify to the beginning of the data.	<b>XPROCESS -1</b> <b>[filename]</b>  <i>Continued on next page</i>

<b>(Cont.) Option</b>	<b>Definition</b>	<b>What you type</b>
<b>-2</b>	Replaces tilde (~)/carriage return (0D)/line feeds (0A) with carriage returns (0D).	<b>XPROCESS -2 [filename]</b>
<b>-3</b>	Replaces all carriage returns (0D) with tildes (~) and drops any line feeds (0A).	<b>XPROCESS -3 [filename]</b>
<b>-4</b>	Drops all carriage returns (0D) and line feeds (0A).	<b>XPROCESS -4 [filename]</b>
<b>-5</b>	Drops all carriage returns (0D) and line feeds (0A) and adds hex 0x1A to the end of the file.	<b>XPROCESS -5 [filename]</b>
<b>-6</b>	Removes all hex 0x1A from the file.	<b>XPROCESS -6 [filename]</b>
<b>-7</b>	Adds GM header/trailer records and drops all carriage returns (0D) and line feeds (0A).	<b>XPROCESS -7 [filename]</b>
<b>-8</b>	Replaces every tilde (~), carriage return (0D), and line feed (0A) with line feed (0A).	<b>XPROCESS -8 [filename]</b>
<b>-9</b>	Replaces every line feed (0A) with tilde (~).	<b>XPROCESS -9 [filename]</b>
<b>-10</b>	Replaces all carriage returns (0D) with carriage return (0D) and line feed (0A).	<b>XPROCESS -10 [filename]</b>
<b>-11</b>	Replaces a string of hexadecimal characters with another string of hexadecimal characters.	<b>XPROCESS -11 [hexString1] [hexString2] [filename]</b>
<b>-12</b>	Removes all occurrences of a hexadecimal string from a file.	<b>XPROCESS -12 [hexString] [filename]</b>
<b>-13</b>	Inserts a hexadecimal string at a specified increment (number of bytes) in the input file.	<b>XPROCESS -13 [#bytes][hexString1] [hexString2] [filename]</b>

## Using the VATPRINT Utility Program

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### Introduction

The VATPRINT utility is an external data processor used to generate Value Added Tax (VAT) Transmission Reports when sending or receiving TRADACOMS or UK EDIFACT data. This report is generated in the format defined by UK Customs and Excise and the UK Article Number Association (ANA).

### Using VATPRINT

You invoke the VATPRINT utility by entering the utility name and parameters in the Pre-Processor and/or Pre-Post Processor fields of the Communication Profile Setup screen. The Pre-Processor is used for sending and the Pre-Post Processor is used for receiving.

### Syntax

The syntax of the VATPRINT utility is:

VATPRINT [option] [Print\_filename] [Attachment\_filename]

### Parameters

The VATPRINT utility has the following parameters:

Item	Description
Option	<ul style="list-style-type: none"> <li>■ /p Writes the report to the printer.</li> <li>■ /f Creates or appends the report to a file.</li> </ul>
Print_filename	<p>The name of the file to create or append. Used only with the /f option. If the Print_filename contains an asterisk (*), then the asterisk will be replaced with the current date and time in the format YYYYMMDDHHMMSS.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Item	Description
Attachment_filename	The name of the file containing the EDI messages that you want the VAT Report for. Used only when the utility is invoked manually from a Command Prompt. When used as a Pre-Processor or Pre-Post Processor within a Communication Profile, the currently processing file name is substituted dynamically each time the utility is run.

### Example

In this example, you want to generate a VAT report from Interoffice Ltd., a Trading Partner in the UK who uses the UK EDIFACT standards. You enter the command line shown below in the Pre-Post Processor field on the Communication Profile assigned to Interoffice. When messages are received from Interoffice, a VAT report is generated and appended to a file in the C:\Reports directory.

**Command line:**

```
VATPRINT.EXE /f C:\Reports\VATreport.txt
```

### Error Handling

The VATPRINT utility records processing errors in the file Vat.err. This file is stored in the bin directory where you installed Gentran:Director. Errors are time and date stamped, and the most recent error is located at the end of the file.

### Supported Standards Versions

The following standards versions are supported with this release of Gentran:Director:

- TRADACOMS V9
- EDIFACT 90.1

### Supported Messages

TRADACOMS Credit Notes and TRADACOMS and EDIFACT INVOIC messages are the only messages that are supported with this release of Gentran:Director.

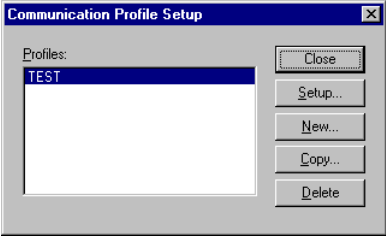
# Copying Communication Profiles

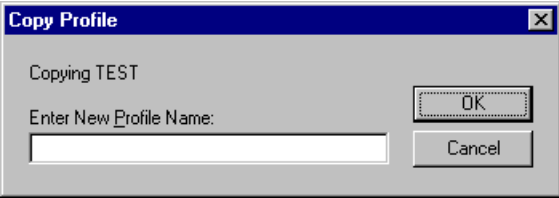
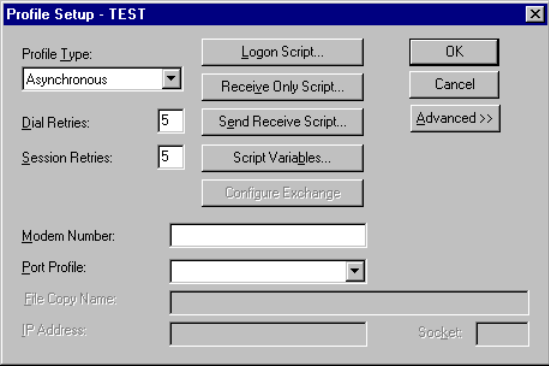
## Introduction

The copy profile feature enables you to save a profile as a different name and make modifications to the profile, instead of creating a new profile from scratch.

## Procedure

To copy a communication profile, complete the following steps:

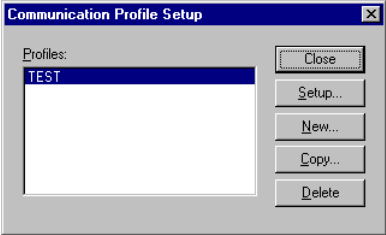
Step	Action
1	<p>From the Tools menu:</p> <ul style="list-style-type: none"> <li>■ Select Communications.</li> <li>■ Select Profile from the Communications submenu.</li> </ul> <p><b>System Response</b></p> <p>The Communication Profile Setup dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

(Cont.) Step	Action
2	<ul style="list-style-type: none"> <li>■ Select the profile you want to copy.</li> <li>■ Click COPY.</li> </ul> <p><b>System Response</b></p> <p>The Copy Profile dialog box is displayed.</p> 
3	<ul style="list-style-type: none"> <li>■ Type the new profile name.</li> <li>■ Click OK.</li> </ul> <p><b>System Response</b></p> <p>The profile is copied under the new name and the Profile Setup dialog box is displayed.</p> 
4	<p>Make any necessary changes to the profile.</p> <p><b>Reference</b></p> <p>For more information on modifying communication profiles, see <i>Creating and Editing Communication Profiles</i> on page 5 - 27.</p>

## Deleting Communication Profiles

### Procedure

To delete a communication profile, complete the following steps:

Step	Action
1	<p>From the Tools menu:</p> <ul style="list-style-type: none"> <li>■ Select Communications.</li> <li>■ Select Profile from the Communications submenu.</li> </ul> <p><b>System Response</b> The Communication Profile Setup dialog box is displayed.</p> 
2	<ul style="list-style-type: none"> <li>■ Select the profile you want to delete.</li> <li>■ Click DELETE.</li> </ul> <p><b>System Response</b> The system prompts you to confirm the delete operation.</p>
3	Click YES to remove the profile.

# Substituting Script Variables

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## Introduction

Script variables are used mainly in the predefined scripts that Sterling Commerce provides to you, but you can also use script variables to create new scripts. If you use a predefined script, you must define the correct value for each variable used in the script. Each variable can be used in all the scripts for a communication profile. These scripts include Logon, Receive Only, and Send Receive.

You can edit a variable in a predefined communication script in the following ways:

- Manually edit a variable in the actual scripts.
- Override the value assigned to a variable by defining the variable on the Script Variable Substitution dialog box.

## Example

If you send data to a trading partner via Commerce:Network, you can manually type in your network mailbox and password into the actual scripts. You can also access the Script Variable Substitution dialog box, type your mailbox in the %var1% (variable 1) field, and type your password in the %var2% (variable 2) field.

## Recommendation

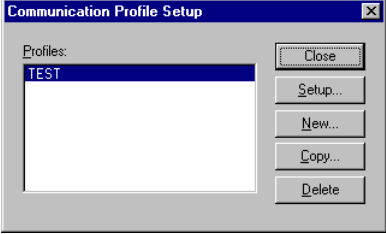
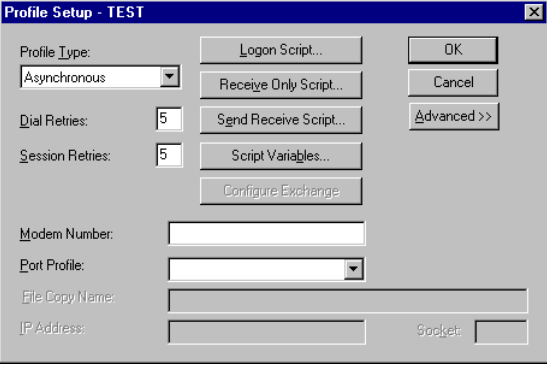
We recommend that you use the Script Variable Substitution dialog box instead of editing the actual scripts whenever possible.

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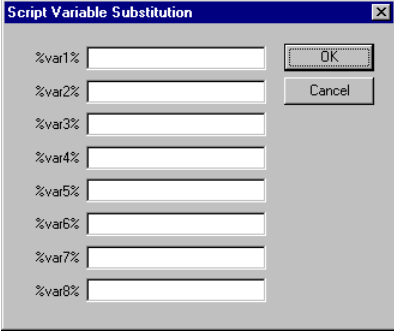


## Procedure

To substitute script variables, complete the following steps:

Step	Action
1	<p>From the Tools menu:</p> <ul style="list-style-type: none"> <li>■ Select Communications.</li> <li>■ Select Profile from the Communications submenu.</li> </ul> <p><b>System Response</b> The Communication Profile Setup dialog box is displayed.</p> 
2	<ul style="list-style-type: none"> <li>■ Select the profile you want to modify.</li> <li>■ Click SETUP.</li> </ul> <p><b>System Response</b> The Profile Setup dialog box is displayed.</p> 

*Continued on next page*

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Click SCRIPT VARIABLES.</p> <p><b>System Response</b> The Script Variable Substitution dialog box is displayed.</p> 
4	<p>Type the actual value of the variable(s) you want to define.</p> <p><b>Note</b> The %var% fields enable you to override the value assigned to a variable (%var1% through %var8%) by defining the variable on this dialog box.</p>
5	Click OK to exit the Script Variable Substitution dialog box.
6	Click OK to exit the Profile Setup dialog box.

# Using the Communication Log

## Overview

---

### Log Summary

The *Log Summary* enables you to view, print, delete, purge, or reprocess communication log entries. You can view information for all completed communication sessions, including the following:

- Status of the session
- Finish date and time
- Profile name
- Name of the application that requested the communication session
- Session control number

### Log Detail

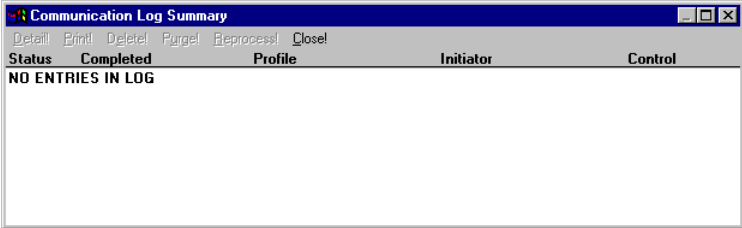
The *Log Detail* function enables you to view the complete communication log for a selected session, including trace information if the Trace function is enabled.

---

# Using the Log Summary

## Procedure

To use the log summary, complete the following steps:

Step	Action
1	<p>From the Tools menu:</p> <ul style="list-style-type: none"> <li>■ Select Communications.</li> <li>■ Select Log from the submenu.</li> </ul> <p><b>System Response</b></p> <p>The Communication Log Summary window is displayed.</p>  <p><b>Note</b></p> <p>This window contains the available session control records for the completed communication sessions.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
2	Do one of the following: <ul style="list-style-type: none"> <li>■ View the summary information for completed session control records.</li> <li>■ Use the following table to determine your next step.</li> </ul>	
	<b>IF you want to...</b>	<b>THEN...</b>
	view the complete communication log for a selected session,	click LOG DETAIL
	print the log summary,	click PRINT!
	purge session control records older than the number of days you specify,	<ul style="list-style-type: none"> <li>■ select a session control record or records and click DELETE!</li> </ul>
	delete a selected document,	click PURGE!
	restart the post-communications process for any files that were received,	<ul style="list-style-type: none"> <li>■ select a session control record and click REPROCESS!</li> </ul>
3	Click CLOSE! to exit the Log Summary window.	

## Status information

The following table describes the status options that can be displayed for a communication session.

<b>Status</b>	<b>Description</b>
<b>Success</b>	Indicates that the communication session was a success.
<b>Failure</b>	Indicates that the communication session failed.

*Continued on next page*

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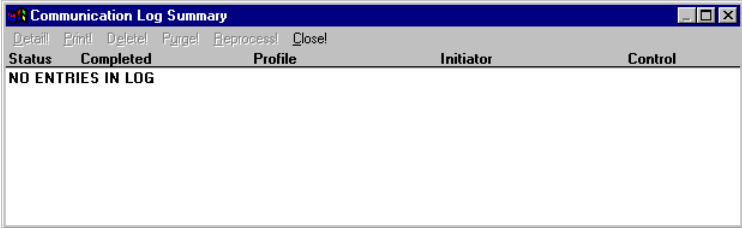
Status	Description
<b>Snd Fail</b>	<ul style="list-style-type: none"><li>■ Refers to a Send/Receive session. A Send/Receive session consists of a Send sub-process and Receive sub-process.</li><li>■ Indicates that the Send sub-process failed, but the Receive sub-process succeeded.</li></ul> <p><b>Note</b> If both sub-processes succeed, the status is Success. If both sub-processes fail, the status is Failure.</p>
<b>Rcv Fail</b>	<ul style="list-style-type: none"><li>■ Refers to a Send/Receive session. A Send/Receive session consists of a Send sub-process and Receive sub-process.</li><li>■ Indicates that the Send sub-process succeeded, but the Receive sub-process failed.</li></ul> <p><b>Note</b> If both sub-processes succeed, the status is Success. If both sub-processes fail, the status is Failure.</p>

---

## Using the Log Detail

### Procedure

To use the log detail, complete the following steps:

Step	Action
1	<p>From the Tools menu:</p> <ul style="list-style-type: none"> <li>■ Select Communications.</li> <li>■ Select Log from the submenu.</li> </ul> <p><b>System Response</b></p> <p>The Communication Log Summary window is displayed.</p>  <p><b>Note</b></p> <p>This window contains the available session control records for the completed communication sessions.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
2	<ul style="list-style-type: none"> <li>■ Select a log summary record.</li> <li>■ Click <b>DETAIL!</b></li> </ul> <p><b>System Response</b> The Communication Log Detail window is displayed.</p> <p><b>Note</b> The Communication Log Detail window displays the details for each action from the selected communication session record.</p>	
3	Use the following table to determine your next step.	
	<b>IF you want to...</b>	<b>THEN...</b>
	print the log details,	click <b>PRINT!</b>
	return to the Log Summary Window,	click <b>SUMMARY!</b>
exit the Log Detail window,	click <b>CLOSE!</b>	
4	Click <b>CLOSE!</b> to exit the Log Summary window.	



# Using the Communicator

## Overview

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### Introduction

The *Communicator* is the Gentran:Director communication feature. The Communicator window lists the currently executing communication session and all sessions waiting to execute.

The Communicator gives you access to all the communications functions available in Gentran:Director, enables you to view the currently queued communication sessions, and delete communication jobs from the queue.

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### How to access

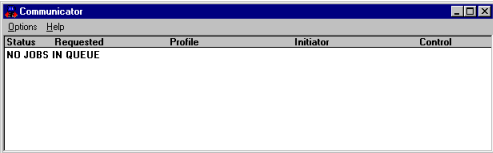
You can access the Communicator by selecting Gentran Director Communicator from the Start menu, or by selecting the Communicator icon from your taskbar when a communication session is executing.

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## Viewing a Communication Session

### Procedure

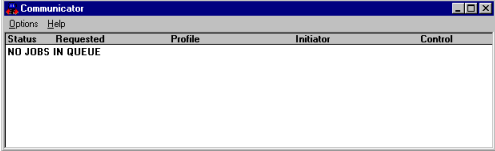
To view the currently executing and queued communication sessions, complete the following steps:

Step	Action
1	<p>From the Start menu:</p> <ul style="list-style-type: none"> <li>■ Select Gentran Director.</li> <li>■ Select Gentran Director Communicator.</li> </ul> <p><b>System Response</b></p> <p>The Communicator window is displayed.</p>  <p><b>Note</b></p> <p>This window enables you to view information for all queued communication sessions. The available information includes the following:</p> <ul style="list-style-type: none"> <li>■ Status of the session</li> <li>■ Requested date and time</li> <li>■ Profile name</li> <li>■ Name of the application that requested the communication session</li> <li>■ Session control number</li> </ul>

## Deleting a Communication Session

### Procedure

To delete a currently queued communication session, complete the following steps:

Step	Action
1	<p>From the Start menu:</p> <ul style="list-style-type: none"> <li>■ Select Gentrans Director.</li> <li>■ Select Gentrans Director Communicator.</li> </ul> <p><b>System Response</b> The Communicator window is displayed.</p> 
2	Select the communication session you want to remove from the queue.
3	<p>From the Options menu, select Delete Job.</p> <p><b>System Response</b> The communication session is removed from the queue.</p> <p><b>Note</b> You can only delete jobs that are queued; not jobs that are currently executing.</p>



# *Using Interchanges*

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## **Contents**

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■ Understanding the Interchanges Browser .....	6 - 3
■ Viewing Interchanges .....	6 - 6
■ Sorting Interchanges .....	6 - 8
■ Viewing Documents within Interchanges .....	6 - 11
■ Attaching Interchanges to a Partner .....	6 - 13
■ Resending Interchanges .....	6 - 16

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# Overview

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## In this chapter

This chapter explains how to use interchanges with Gentran:Director.

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## Interchange feature

The Interchange feature enables you to:

- View a hierarchical list of all the interchanges that were sent or received.
  - View status information for the interchanges. For example, whether or not a functional acknowledgment was received and the status of that acknowledgment.
  - Filter the display of interchanges.
  - Access the documents within the interchanges.
-

# Understanding the Interchanges Browser

## Introduction

The Interchanges browser enables you to view a list of all the interchanges, groups, and documents that were sent or received. This browser contains status information about the interchanges. For example, whether or not a functional acknowledgment was received and the status of that acknowledgment.

### Note

The Interchanges browser can always be accessed.

## Information organization

The information on the Interchanges browser is organized in a hierarchical manner. The following table describes the hierarchical organization of the information on the Interchanges browser:

Level	How to access	Information displayed
Interchange	Open Interchanges browser	<ul style="list-style-type: none"> <li>■ The direction of the interchange</li> <li>■ Control number</li> <li>■ Partner name</li> <li>■ Date and time the interchange was created</li> <li>■ Process status</li> <li>■ Network status</li> <li>■ Interchange acknowledgment status</li> </ul> <p><b>Note</b> Any components that are missing or not appropriate for a particular interchange, are not displayed.</p>
Group	Double-click an interchange	<ul style="list-style-type: none"> <li>■ The group control number</li> <li>■ Group type</li> <li>■ Group acknowledgment status</li> </ul> <p><b>Note</b> Any components that are missing or not appropriate for a particular group, are not displayed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Level</b>	<b>How to access</b>	<b>Information displayed</b>
Document	Double-click a group	<ul style="list-style-type: none"> <li>■ The document status</li> <li>■ Document control number</li> <li>■ Document typ</li> <li>■ Document name</li> <li>■ Reference data</li> <li>■ Transaction acknowledgment status</li> </ul> <p><b>Note</b> Any components that are missing or not appropriate for a particular document, are not displayed.</p>
EDI data	Double-click a document  <p><b>Note</b> A screen entry translation object for that document must be available on your system.</p>	EDI data

**Browser functions**

You can perform the following functions on the Interchanges browser:

- Filter the display of interchanges from the Interchanges Filter dialog box by date, partner, and direction (inbound and outbound).
- Display the raw-EDI data or translator report data for the selected interchange or document, in the Data view and Translator Report view windows.
- Toggle the status of interchanges between “Ready to Send” and “Hold”.
- Print or delete a selected item.

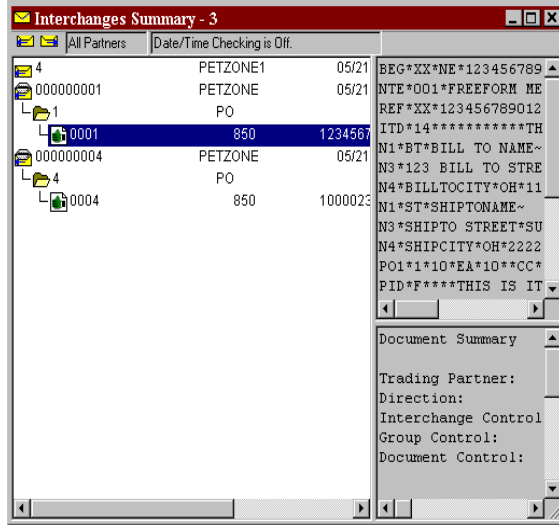
**Note**

Use the toggle function if you do not want to send an interchange right away.



## How to access

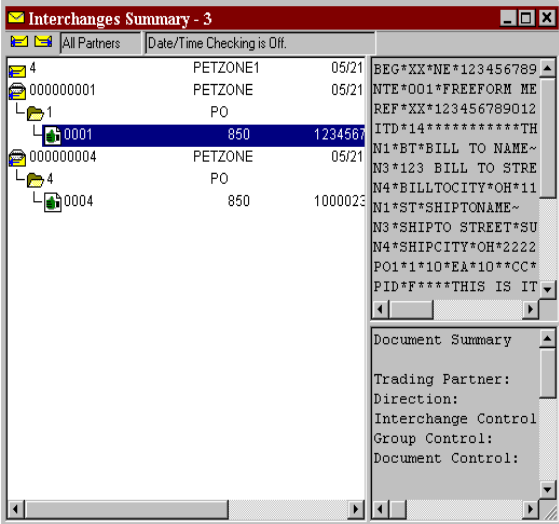
To access the Interchange Browser, select Interchanges from The Desk. The Interchanges browser is displayed.



# Viewing Interchanges

## Procedure

To view interchanges, complete the following steps:

Step	Action
1	<p>From The Desk, select Interchanges.</p> <p><b>System Response</b></p> <p>The Interchanges browser is displayed.</p> 
2	<p>Do you want to filter the display of interchanges by status?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, see <i>Sorting Interchanges</i> on page 6 - 8.</li> <li>■ If <i>no</i>, continue with step 3.</li> </ul> <p><b>Note</b></p> <p>The Sort function enables you to filter the display of interchanges by date, partner, and direction (inbound and outbound).</p>
3	<p>Select an interchange, or a group of interchanges if allowed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
4	Use the following table to determine your next step.	
	<b>IF you want to...</b>	<b>THEN select...</b>
	view a translator report of the actions the translator took on this interchange,	<ul style="list-style-type: none"> <li>■ View from the Commands menu, and then Translator Report.</li> </ul>
	view the content of a single selected interchange in raw EDI data format,	<ul style="list-style-type: none"> <li>■ Interchanges from the View menu.</li> <li>■ Data from the View submenu.</li> </ul>
	print a selected interchange or a summary of interchanges,	Print from the File menu.
	view the translator report for a single selected interchange,	<ul style="list-style-type: none"> <li>■ Interchanges from the View menu.</li> <li>■ Translator Report from the View submenu.</li> </ul>
	delete a selected interchange and all associated documents,	<p>Delete from the Document menu.</p> <p><b>Notes</b></p> <ul style="list-style-type: none"> <li>■ If you delete an interchange with a status of “Queued,” you receive a warning that you must remove specified messages from Out Documents and from your trading partner’s Inbox. If you proceed, you are warned that if your partner bases processing results on control number sequencing, you should modify the transaction, group, and interchange control numbers.</li> <li>■ If you delete an interchange with a status of “Ready to send,” you are warned that if your partner bases processing results on control number sequencing, you should modify the transaction, group, and interchange control numbers.</li> </ul>
attach an interchange to a partner	Attach from the Document menu.	

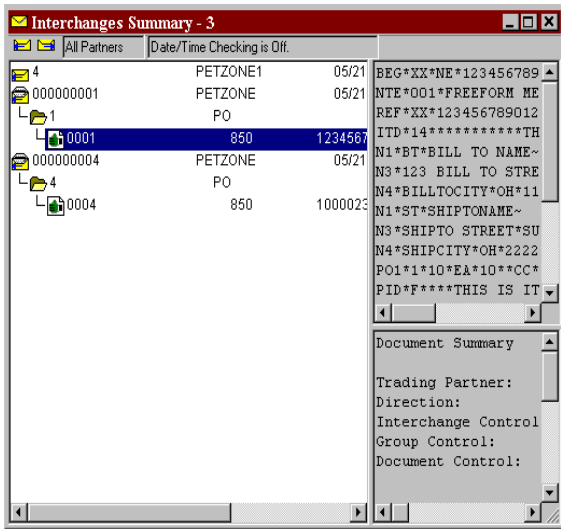
# Sorting Interchanges

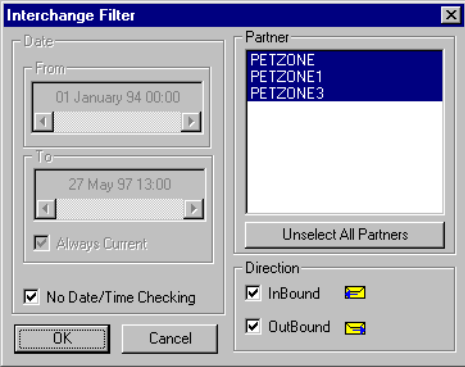
## Introduction

When the Interchanges browser is active, the Sort function enables you to filter the display of interchanges by date, partner, and direction for inbound and outbound.

## Procedure

To sort interchanges by partner and/or date, complete the following steps:

Step	Action
1	<p>From The Desk, select Interchanges.</p> <p><b>System Response</b> The Interchanges browser is displayed.</p>  <p>The screenshot shows a window titled "Interchanges Summary - 3". It has a menu bar with "All Partners" and "Date/Time Checking is Off.". Below is a tree view showing a hierarchy of interchanges. The selected item is "0001" under "000000001", with details "850" and "1234567". To the right, a detailed view shows EDI data: "BEG*XX*NE*123456789", "NTE*001*FREEFORM ME", "REF*XX*123456789012", "LTD*14*****TH", "N1*BT*BILL TO NAME~", "N3*123 BILL TO STRE", "N4*BILLTOCITY*OH*11", "N1*ST*SHIPTONAME~", "N3*SHIPTO STREET*SU", "N4*SHIPCITY*OH*2222", "PO1*1*10*EA*10**CC*", "PID*P****THIS IS IT". At the bottom, a "Document Summary" section lists: "Trading Partner:", "Direction:", "Interchange Control", "Group Control:", and "Document Control:".</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
2	<p>From the Commands menu, select Sort.</p> <p><b>System Response</b> The Interchange Filter dialog box is displayed.</p> 
3	<p>Do you want the system to filter the display of interchanges by date and time?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, clear the “No Date/Time Checking” check box and proceed with step 4.</li> <li>■ If <i>no</i>, select the “No Date/Time Checking” check box and proceed with step 6.</li> </ul>
4	<p>Use the Date From slide bar to select the beginning date of a date range, from which the system should filter the display of interchanges.</p>
5	<p>Do you want the end date for the date range to always be the current system date and time?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, select the “Always Current” check box.</li> <li>■ If <i>no</i>, deselect the “Always Current” check box and move the Date to slide bar to the date and time you want to use.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
6	<p>Do you want to filter the display of interchanges by partner?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, select the partners that you want displayed from the Partner list. The Partner list contains all the partner profiles on your system.</li> </ul> <p><b>Note</b></p> <p>By default, all partners are displayed. You can click partner profiles to deselect them and change the display. To deselect all the partner profiles, click UNSELECT ALL PARTNERS. At least one partner must be selected.</p> <ul style="list-style-type: none"> <li>■ If <i>no</i>, continue with step 7.</li> </ul>
7	<p>Which direction do you want to filter the interchange?</p> <p>The default display is both inbound and outbound interchanges. Click the Inbound or Outbound check box to clear the direction.</p> <p><b>Note</b></p> <p>At least one of the Direction check boxes must be selected.</p>

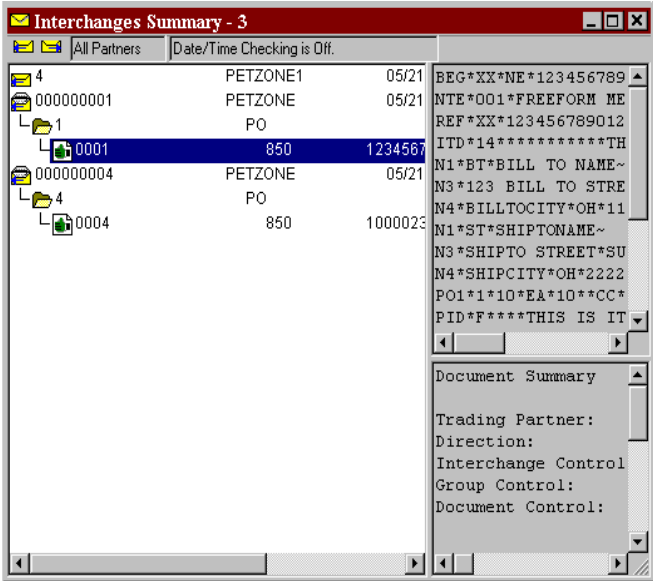
# Viewing Documents within Interchanges

## Introduction

You can view the individual documents in an interchange as long as a screen entry translation object for each document is available on your system.

## Procedure

To view the documents within an interchange, complete the following steps:

Step	Action
1	<p>From The Desk, select Interchanges.</p> <p><b>System Response</b> The Interchanges browser is displayed.</p>  <p><b>Note</b> The Interchanges browser contains all the interchanges, group, and documents that were sent or received.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>	
2	Double-click a document to view it.  <b>Note</b> You must have a screen entry translation object for this document available on your system.	
3	Select a document.	
4	Use the following table to determine your next step.	
	<b>IF you want to...</b>	<b>THEN select...</b>
	view a translator report of the actions the translator took on this document,	<ul style="list-style-type: none"> <li>■ Interchanges from the View menu, and then Translator Report.</li> </ul>
	view the content of a single selected interchange in raw EDI data format,	<ul style="list-style-type: none"> <li>■ Interchanges from the View menu.</li> <li>■ Data from the View submenu.</li> </ul>
	print a selected document or translation report,	Print from the File menu.
	delete a selected document,	Delete from the Document menu.
copy the document to the appropriate browser,	<ul style="list-style-type: none"> <li>■ Copy from the Document menu.</li> <li>■ Select the appropriate browser:               <ul style="list-style-type: none"> <li><input type="checkbox"/> Select ?In Documents or In Documents for compliant Inbound documents.</li> <li><input type="checkbox"/> Select Workspace for outbound documents from the submenu.</li> </ul> </li> </ul>	



# Attaching Interchanges to a Partner

## Introduction

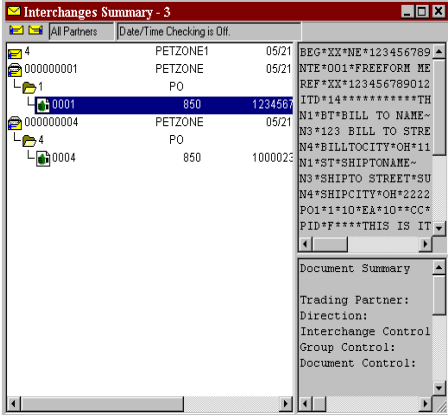
The Attach to Partner dialog box can be accessed when the Interchanges browser is active and one interchange is selected. The Attach function enables you to link the interchanges to a partner. For example, you should use the Attach function if you received documents that did not have an identifiable partner and are now listed without a partner in the ?In Documents browser.

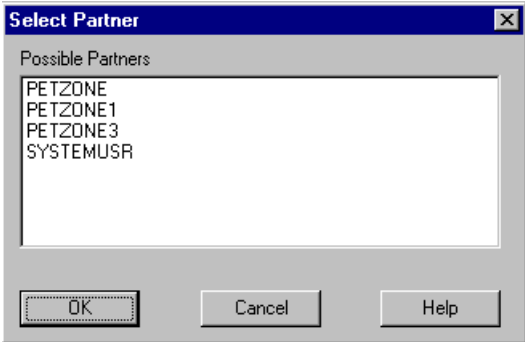
## Note

The interchanges for documents not having an identifiable partner, are listed in the Interchanges browser without a partner.

## Procedure

To attach an interchange to a partner, complete the following steps:

Step	Action
1	<p>From The Desk, select Interchanges.</p> <p><b>System Response</b> The Interchanges browser is displayed.</p>  <p><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
2	Select an interchange.
3	<p>Does the partner already exist?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, continue with step 4.</li> <li>■ If <i>no</i>, you must create the partner before you can continue.</li> </ul> <p><b>Reference</b></p> <p>For instructions on creating a new partner and partner relationship, see <i>Creating a New Partner Definition</i> on page 3 - 28.</p>
4	<p>From the Document menu, select Attach.</p> <p><b>System Response</b></p> <p>The Select Partner dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
5	<ul style="list-style-type: none"> <li>■ Select a partner from the Possible Partners list.</li> <li>■ Click OK.</li> </ul> <p><b>System Response</b></p> <p>The selected interchange is linked to the partner, and the Interchange browser is displayed.</p> <p><b>Exceptions</b></p> <ol style="list-style-type: none"> <li>1. If the partner to which you are attaching the interchange has more than one interchange definition, you are prompted with an additional dialog box. In this case, you should do the following: <ul style="list-style-type: none"> <li>■ Select the appropriate interchange definition.</li> <li>■ Click OK.</li> </ul> </li> <li>2. If the partner to which you are attaching the interchange has more than one group definition, you are prompted with an additional dialog box. In this case, you should do the following: <ul style="list-style-type: none"> <li>■ Select the appropriate group definition.</li> <li>■ Click OK.</li> </ul> </li> <li>3. If the partner to which you are attaching the interchange has more than one relationship defined for a type of document in the interchange, you are prompted with an additional dialog box for each instance. In this case, you should do the following: <ul style="list-style-type: none"> <li>■ Select the appropriate relationship definition.</li> <li>■ Click OK.</li> </ul> </li> </ol>
6	<p>After you attach the interchange to a partner, open ?In Documents by selecting it from the appropriate area of The Desk.</p> <p><b>Note</b></p> <p>You can then export, print, or move the documents to the In Drawer.</p>

# Resending Interchanges

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## Introduction

To resend outbound interchanges from the Interchanges browser, you must use the Resend command. You can only resend interchanges that were previously sent or that have a status of “Ready to send.”

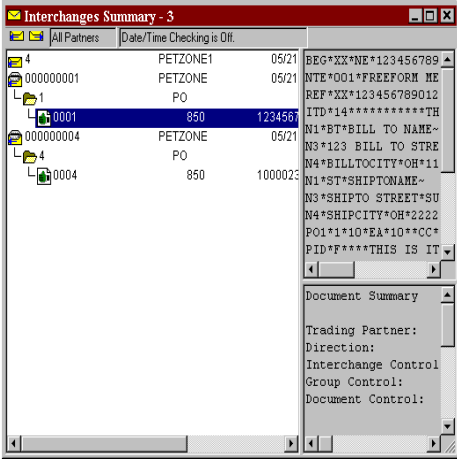
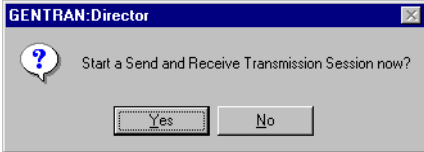
## Resend process

The following table describes the system process that occurs when you resend a selected interchange:

Stage	Description
1	The documents in the selected interchange are batched into EDI envelopes and the required control numbers, etc., are generated from the information in the partner profile.
2	After the interchange is built, it is listed in the Interchange browser. For instructions on viewing an interchange, see <i>Viewing Interchanges</i> on page 6 - 6.
3	<p>If the communication fails because there is no mailbox set up or the Mailbox service is not started, the interchange and documents are left in a “Ready to send” status.</p> <p>If communication fails because there is no modem, the interchange and documents are left in a “Queued” status.</p> <p><b>Note</b></p> <p>No user action is required at this point. Interchanges that failed to send are automatically sent as part of the next transmission session.</p>
4	After communication is successful, the documents are moved to the Out Drawer and the interchange status is set to “Sent.”

**Procedure**

To resend outbound interchanges, complete the following steps:

Step	Action
1	<p>From The Desk, select Interchanges.</p> <p><b>System Response</b> The Interchanges browser is displayed.</p> 
2	Select the outbound interchange that needs to be resent.
3	<p>From the Commands menu, select Resend.</p> <p><b>System Response</b> The Gentrans:Director dialog box is displayed.</p> 
4	Click YES to start the transmission session.



# *Using Acknowledgments*

---

## **Contents**

- Overview ..... 7 - 2
  - Defining Inbound Acknowledgment Criteria ..... 7 - 3
  - Defining Outbound Acknowledgment Criteria ..... 7 - 6
  - Manually Acknowledging a Document ..... 7 - 10
-

## Overview

---

---

### In this chapter

This chapter explains how to use Gentran:Director acknowledgments, and includes the following topics:

- Defining inbound acknowledgment criteria
- Defining outbound acknowledgment criteria
- Manually acknowledging a document

---

### Acknowledge feature

Acknowledgments are sent to a trading partner to inform them that you received their transmission, and to tell them about any errors. You must define the level of acknowledgments for those you receive from your trading partners, as well as those that you send to your trading partners when you receive a transmission from them.

---



## Defining Inbound Acknowledgment Criteria

---

### Introduction

The criteria that the system uses to acknowledge inbound document, functional groups, and/or interchanges is defined at the Partner level. The translation objects that are necessary to generate functional acknowledgments are included as system translation objects and are registered when you install Gentran:Director.

### Note

If you are generating functional acknowledgments as a result of receiving documents for an inbound relationship, part of establishing that inbound relationship is setting up the corresponding outbound relationship to generate acknowledgments.

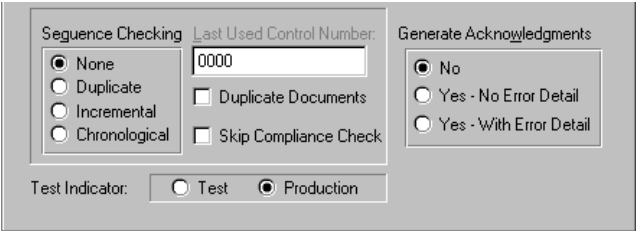
### Reference

For information on establishing an outbound relationship to generate acknowledgments, see *Creating a New Outbound Relationship* on page 3-43.

---

**Procedure**

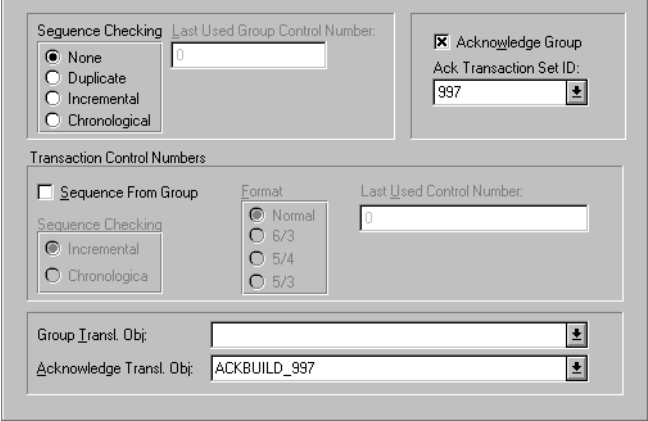
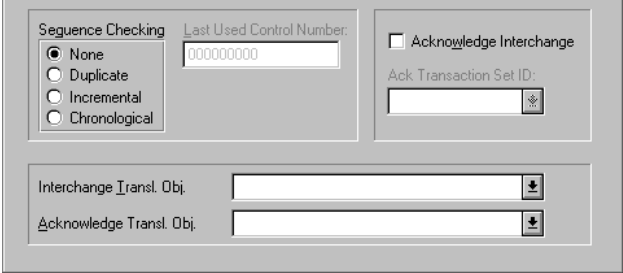
To define criteria to generate acknowledgments, complete the following steps:

Step	Action
1	<p>Document acknowledgment criteria is defined when you set up the partner relationship using the Advanced options on the Inbound Relationship dialog box.</p>  <p>The screenshot shows a dialog box with the following sections:</p> <ul style="list-style-type: none"> <li><b>Sequence Checking:</b> Radio buttons for None (selected), Duplicate, Incremental, and Chronological.</li> <li><b>Last Used Control Number:</b> A text box containing '0000'.</li> <li><b>Generate Acknowledgments:</b> Radio buttons for No (selected), Yes - No Error Detail, and Yes - With Error Detail.</li> <li><b>Test Indicator:</b> Radio buttons for Test and Production (selected).</li> <li><b>Checkboxes:</b> Duplicate Documents and Skip Compliance Check.</li> </ul>

**Reference**

For more information about setting parameters on the Inbound Relationship dialog box, see page 3 - 31.

*Continued on next page*

(Cont.) Step	Action
2	<p>Functional Group acknowledgment criteria is defined when you set up the Inbound Group Entry using the Advanced options on the Inbound Group Entry dialog box.</p>  <p><b>Reference</b></p> <p>For more information about setting parameters on the Inbound Group Entry dialog box, see page 3 - 31.</p>
3	<p>Interchange acknowledgment criteria is defined when you set up the Inbound Interchange Entry using the Advanced options on the Inbound Interchange Entry dialog box.</p>  <p><b>Reference</b></p> <p>For more information about setting parameters on the Inbound Interchange Entry dialog box, see page 3 - 31.</p>

# Defining Outbound Acknowledgment Criteria

---

## Introduction

Reconciling documents and their acknowledgments is a function that the system automatically performs for you. The translation objects that are necessary to process the acknowledgments you receive, are included as system translation objects and are registered when you install Gentran:Director.

However, you must establish the level of acknowledgments that you receive from your trading partners by completing the Outbound Relationship dialog box.

### Note

If you are receiving functional acknowledgments as a result of sending documents for an outbound relationship, part of establishing that outbound relationship is setting up the corresponding inbound relationship to receive acknowledgments from your partner.

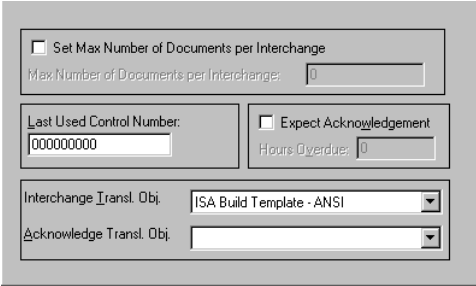
### Reference

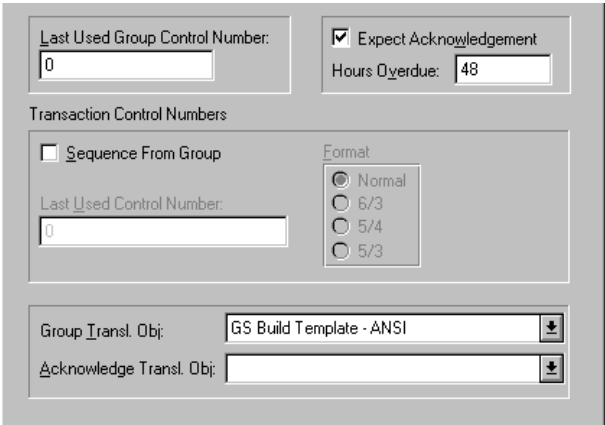
For information about establishing an inbound relationship to receive acknowledgments, see *Creating a New Inbound Relationship* on page 3 - 31.

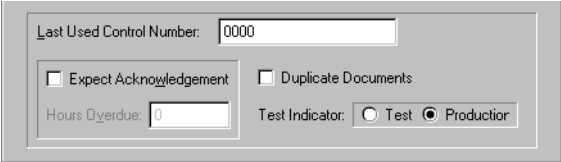
---

## Procedure

To set up the level of acknowledgments that you expect to receive from your partners, complete the following steps:

Step	Action
1	<p>The requirement for receiving interchange acknowledgments is set in the Advanced section of the Outbound Interchange Entry dialog box.</p>  <p><b>Reference</b></p> <p>For more information on setting parameters on the Outbound Interchange Entry dialog box, see page 3 - 42.</p> <p><b>Recommendation</b></p> <p>Do <i>not</i> change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you are certain of the result.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

(Cont.) Step	Action
2	<p>The requirement for receiving functional group acknowledgments is set in the Advanced section of the Outbound Group Entry dialog box.</p>  <p><b>Reference</b></p> <p>For more information on setting parameters on the Outbound Group Entry dialog box, see page 3 - 42.</p> <p><b>Recommendation</b></p> <p>Do <i>not</i> change the translation objects in the Group Transl. Obj. and Acknowledge Transl. Obj. lists, unless you are certain of the result.</p> <p><b>Note</b></p> <p>If the acknowledgment is overdue, or it is not received in the number of hours designated in the Hours Overdue box, it is indicated with a status of “Overdue” on the Interchanges browser.</p> <ul style="list-style-type: none"> <li>■ For instructions on how to access the Interchanges browser, see <i>Viewing Documents within Interchanges</i> on page 6-11.</li> <li>■ For an explanation of status codes, see the <i>Glossary</i> on page G - 8.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>The requirement for receiving transaction set acknowledgments is set in the Advanced section of the Outbound Relationship dialog box.</p>  <p><b>Reference</b></p> <p>For more information on setting parameters on the Outbound Relationship dialog box, see page 3 - 42.</p>

---

# Manually Acknowledging a Document

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---

## Introduction

The Acknowledge function does *NOT* generate an acknowledgment; it merely changes the status of the outbound document. The status of a document in the Out Drawer may need to be manually set to “acknowledged” for many reasons. For example, if you have contacted a partner about an overdue document and that partner verified that it was received, but they are not sending you an acknowledgment.

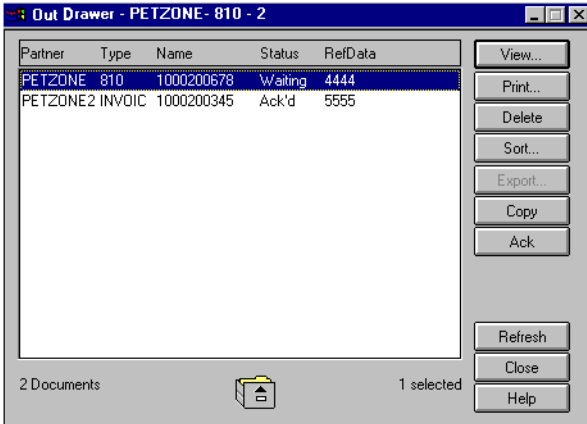
---

## Procedure

To manually change the status of a document to acknowledged, complete the following steps:

<b>Step</b>	<b>Action</b>
1	From The Desk, select Out Drawer. <b>System Response</b> The Out Drawer Summary dialog box is displayed. <i>Continued on next page</i>



<b>(Cont.) Step</b>	<b>Action</b>															
2	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select the type of document for the partner.</li> <li>■ Click VIEW.</li> </ul> <p><b>System Response</b></p> <p>The Out Drawer browser is displayed.</p>  <p>The screenshot shows a window titled "Out Drawer - PETZONE - 810 - 2". It contains a table with the following data:</p> <table border="1"> <thead> <tr> <th>Partner</th> <th>Type</th> <th>Name</th> <th>Status</th> <th>RefData</th> </tr> </thead> <tbody> <tr> <td>PETZONE</td> <td>810</td> <td>1000200678</td> <td>Waiting</td> <td>4444</td> </tr> <tr> <td>PETZONE2</td> <td>INVOIC</td> <td>1000200345</td> <td>Ack'd</td> <td>5555</td> </tr> </tbody> </table> <p>Below the table, it indicates "2 Documents" and "1 selected". On the right side of the window, there are buttons for View..., Print..., Delete, Sort..., Export..., Copy, Ack, Refresh, Close, and Help.</p>	Partner	Type	Name	Status	RefData	PETZONE	810	1000200678	Waiting	4444	PETZONE2	INVOIC	1000200345	Ack'd	5555
Partner	Type	Name	Status	RefData												
PETZONE	810	1000200678	Waiting	4444												
PETZONE2	INVOIC	1000200345	Ack'd	5555												
3	<p>Select an Unacknowledged document that needs to be set to "Ack'd" (acknowledged).</p> <p><b>Note</b></p> <p>Unacknowledged documents can have one of the following statuses:</p> <ul style="list-style-type: none"> <li>■ Overdue</li> <li>■ Waiting</li> <li>■ Sent</li> <li>■ OnNet</li> <li>■ PickedUp</li> <li>■ NetErr</li> <li>■ NetWarn</li> </ul>															
4	<p>Click ACK.</p> <p><b>System Response</b></p> <p>The status of the document is set to "Ack'd."</p>															



# *Using the Tracking and Audit Systems*

---

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  - Viewing and Printing Document Tracking Information ..... 8 - 3
  - Viewing and Printing the Audit Log Information ..... 8 - 5
-

## Overview

---

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### In this chapter

This chapter describes how to use the Gentran:Director tracking and audit systems.

---

### Tracking feature

The system writes a Document Tracking record for every significant event that occurs for a document. For example, a Document Tracking record is written when the document is created, when it is modified, or when it is exported.

#### Note

This function is not available if document level auditing is disabled. For more information on enabling document level auditing, see “System Administrator Functions” in the *Administrator’s Guide*.

---

### Audit feature

The system writes an Audit record for every significant event that occurs in the system. For example, an Audit record is written when a user logs on, when a Send session is initiated, or when a document is deleted.

#### Note

The Audit Log contains entries for the entire Gentran:Director system. The events are differentiated by user name and machine name.

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# Viewing and Printing Document Tracking Information

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## Introduction

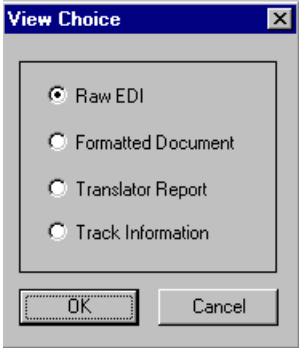
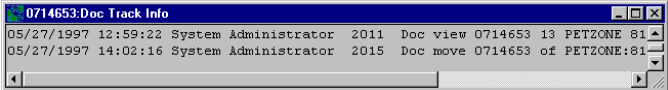
Typically, you view document tracking information to help resolve a problem with a document. These records can be viewed from any of the document browsers.

---

## Procedure

To view or print document tracking information, complete the following steps:

<b>Step</b>	<b>Action</b>
1	From The Desk, select a browser.  <b>System Response</b> If you select the In Documents, ?In Documents, Out Documents, ?Out Documents, In Drawer, or Out Drawer browser, the summary dialog box for that browser is displayed.
2	Do the following: <ul style="list-style-type: none"><li>■ Select the type of document for the appropriate partner.</li><li>■ Click VIEW to access the browser containing those documents.</li></ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Step</b>	<b>Action</b>
3	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select a single document.</li> <li>■ From the Commands menu, select View.</li> </ul> <p><b>System Response</b> The View Choices dialog box is displayed.</p> 
4	<p>Select the Track Information option and click OK.</p> <p><b>System Response</b> A new tracking window for that document is displayed.</p>  <p><b>Note</b> The tracking window contains an entry for each tracked event. If there are more events than can be displayed in the window, a scroll bar enables you to view the remaining records.</p>
5	<p>To print the displayed tracking information, select Print from the File menu.</p>

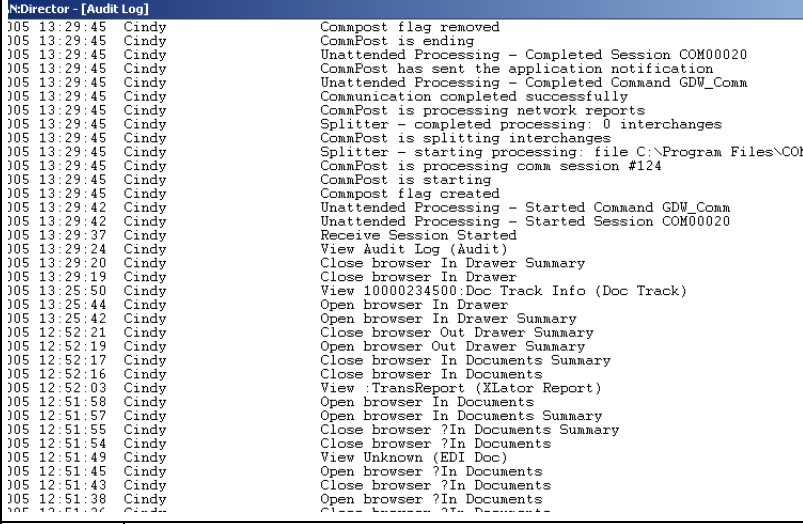
# Viewing and Printing the Audit Log Information

## Introduction

The Audit Log allows you to get information to help resolve a system problem, or to track a user's activities. These records may be viewed at any time.

## Procedure

To view or print audit log information, complete the following steps:

Step	Action
1	<p>From the View Menu, select Audit Log.</p> <p><b>System Response</b></p> <p>A new Audit Log window is displayed that contains an entry for each audited event.</p>
	 <pre> NDirector - [Audit Log] 105 13:29:45 Cindy Compost flag removed 105 13:29:45 Cindy ComPost is ending 105 13:29:45 Cindy Unattended Processing - Completed Session COM00020 105 13:29:45 Cindy ComPost has sent the application notification 105 13:29:45 Cindy Unattended Processing - Completed Command GDW_Comm 105 13:29:45 Cindy Communication completed successfully 105 13:29:45 Cindy ComPost is processing network reports 105 13:29:45 Cindy Splitter - completed processing: 0 interchanges 105 13:29:45 Cindy ComPost is splitting interchanges 105 13:29:45 Cindy Splitter - starting processing: file C:\Program Files\COM 105 13:29:45 Cindy ComPost is processing comm session #124 105 13:29:45 Cindy ComPost is starting 105 13:29:45 Cindy Compost flag created 105 13:29:42 Cindy Unattended Processing - Started Command GDW_Comm 105 13:29:42 Cindy Unattended Processing - Started Session COM00020 105 13:29:37 Cindy Receive Session Started 105 13:29:24 Cindy View Audit Log (Audit) 105 13:29:20 Cindy Close browser In Drawer Summary 105 13:29:19 Cindy Close browser In Drawer 105 13:25:50 Cindy View 10000234500:Doc Track Info (Doc Track) 105 13:25:44 Cindy Open browser In Drawer 105 13:25:42 Cindy Open browser In Drawer Summary 105 12:52:21 Cindy Close browser Out Drawer Summary 105 12:52:19 Cindy Open browser Out Drawer Summary 105 12:52:17 Cindy Close browser In Documents Summary 105 12:52:16 Cindy Close browser In Documents 105 12:52:03 Cindy View :TransReport (XLator Report) 105 12:51:58 Cindy Open browser In Documents 105 12:51:57 Cindy Open browser In Documents Summary 105 12:51:55 Cindy Close browser ?In Documents Summary 105 12:51:54 Cindy Close browser ?In Documents 105 12:51:49 Cindy View Unknown (EDI Doc) 105 12:51:45 Cindy Open browser ?In Documents 105 12:51:43 Cindy Close browser ?In Documents 105 12:51:38 Cindy Open browser ?In Documents 105 12:51:37 Cindy Close browser ?In Documents </pre>
2	<p>To print the displayed audit information, select Print from the File menu.</p>





# *Using the Accum Tracking Extension*

---

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---

# Overview

## Understanding the Accum Tracking Extension

---

### Introduction

Some automotive original equipment manufacturers (OEMs) require their suppliers to track accumulative year-to-date (YTD) quantities of the parts they ship. These parts must be tracked through a combination of destination (partner location) and part number (trackable item).

### Example

If a customer ships partner number 55663322 to two different locations, there are two records (one for each location) for this part number.

The accumulative count for each part number is included in the ANSI X12 856 Advance Ship Notices (ASN) that the supplier sends to the OEM.

The accum quantity that most OEMs typically require in the ASN, is the sum of the actual YTD quantity (for the model year, not the calendar year) at the last shipment, plus the ship quantity.

### How Accum Tracking works

The Accum Tracking Extension is an add-on feature of Gentran:Director which enables you to do the following:

- Define items to be tracked
- Maintain items to be tracked
- Maintain the associated counts
- Report on those items

The Accum Tracking Extension lets you define trackable items. Each trackable item is the equivalent of one part (identified by part number) that is shipped to one location for a partner. This enables you to automatically keep track of accumulative YTD quantities of automotive parts, so that you can send them in the ASNs.

---

## Accum Tracking process

The following table illustrates the accum tracking process. It is based on a scenario in which you ship part number 123 to the Detroit and Toronto locations of Generic Auto Company:

Stage	Description
1	You receive the system and screen entry translation objects for Generic Auto Company from Sterling Commerce.
2	Register the translation objects in Gentran:Director.
3	Import an outbound partner relationship for Generic Auto Company into the Gentran:Director Partner Editor.
4	In the Generic Auto Company partner relationship (in Partner Editor), create one location table for the Detroit location and one location table for the Toronto location.
5	In the Accum Tracking Extension, create a trackable item 123 for the Detroit location and <i>another</i> trackable item 123 for the Toronto location.
6	The system stores each trackable item as a record in the Gentran:Director database lookup table (identified as a accum tracking item by the tag “\$\$\$Accum\$\$\$”).  <b>Note</b> This process is handled by the system and is hidden from you. You do not create the lookup table.
7	Use the screen entry translation object to enter the ASN in Gentran:Director. As part of the ASN, type the ship quantity of each part, or trackable item.
8	Send the ASN to your partner.

*Continued on next page*

Stage	Description
9	While the system is preparing to send the ASN, it looks up the accum quantity of each item and adds that quantity to the ship quantity you entered on the ASN. The system inserts the sum of these two quantities in the accum quantity field on the ASN.  <b>Example</b> For item 123 bound for Detroit: Accum quantity + Ship quantity = total accum quantity
10	After the ASN is sent, the system automatically adds the ship quantity to the accum quantity stored in the database lookup table, and updates the accumulative count.

### Manual intervention

As shown in the previous table, the system handles most of the accum tracking process automatically. There are very few exceptions when you will need to manually intervene. Some exceptions are the following:

- If you experience communication problems, you may need to manually correct the affected accums.
- For each new model year, you need to reset each accum to zero.

#### Note

Some automotive OEMs have specific accum tracking requirements. The translation objects that you receive from Sterling Commerce are designed to accommodate these requirements.

### Software components

The Accum Tracking Extension is a separate install set on the Gentran:Director CD. The Accum Tracking Extension consists of the following components:

Component	Description
ACCUM.EXE	Accum Tracking Extension executable.
ACCUM.HLP	Help file for the Accum Tracking Extension.
README.TXT	Read Me file for the Accum Tracking Extension.

# Implementing the Accum Tracking Extension

## Process

The following table provides a high-level overview of the sequence of tasks you complete to implement the Accum Tracking Extension with Gentran:Director.

Stage	Description
1	<p><b>Install Gentran:Director, including the Accum Tracking Extension</b></p> <p><b>Reference</b> For more information, see the <i>Gentran:Director Getting Started Guide</i>.</p>
2	<p><b>Register translation objects</b></p> <p>In Gentran:Director, register the system and screen entry translation objects from the disk you receive from Sterling Commerce (*.TPL files).</p> <p><b>Reference</b> For more information, see <i>Registering (Installing) a New Translation Object</i> on page 2-3.</p>
3	<p><b>Import partners</b></p> <p>In Partner Editor, import the partner profiles from the disk you receive from Sterling Commerce (*.PAR files).</p> <p><b>Reference</b> For more information, see <i>Importing a Partner Profile</i> on page 3-60.</p>
4	<p><b>Create location tables</b></p> <p>In the Partner Editor, create location tables for the associated locations for each partner.</p> <p><b>Reference</b> For more information, see <i>Creating Partner Locations</i> on page 3-87.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Stage	Description
5	<b>Configure Accum Tracking Extension</b> Configure the Accum Tracking Extension to your specifications. <b>Reference</b> For more information, see <i>Using the Configuration Dialog box</i> on page 9-11.
6	<b>Set up the tracking environment</b> Set up the items that you want to track. <b>Reference</b> For more information, see <i>Adding a Trackable Item</i> on page 9-21.
7	Process your data through Gentran:Director <b>Reference</b> For more information, see the <i>Using Documents</i> chapter in this guide.

---

# Using the Accum Tracking Extension

## Accum Tracking Extension Components

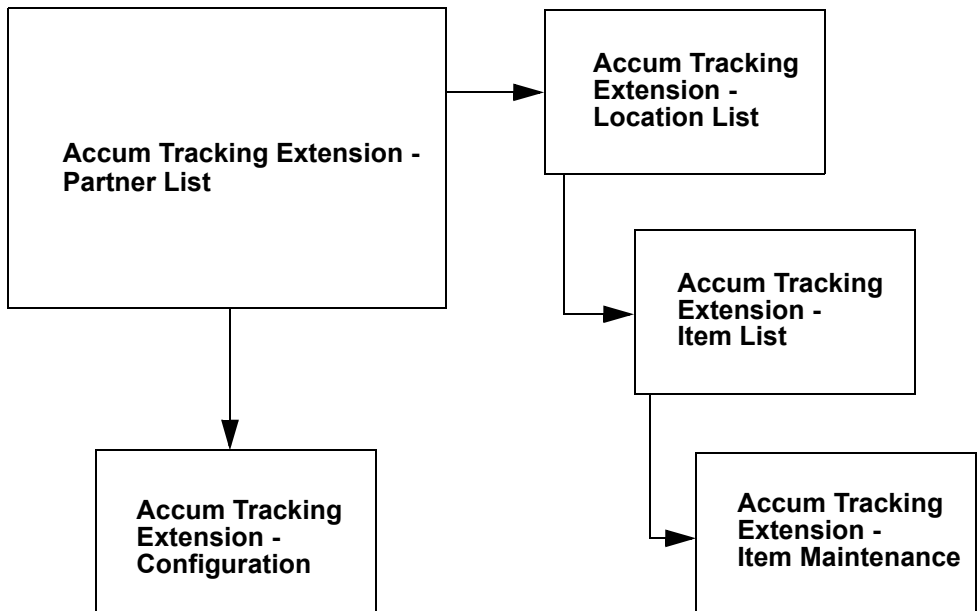
---

### Introduction

The Accum Tracking Extension is a graphical user interface that uses a branching series of dialog boxes, and enables you to add and maintain trackable items.

### Diagram

The following diagram illustrates the branching sequence of the Accum Tracking Extension dialog boxes:



---

# Using the Partner List Dialog box

---

## Introduction

The Accum Tracking Extension - Partner List dialog box is the main dialog box of the Accum Tracking Extension. This dialog box contains a list of all partner relationships currently defined in Gentran:Director.

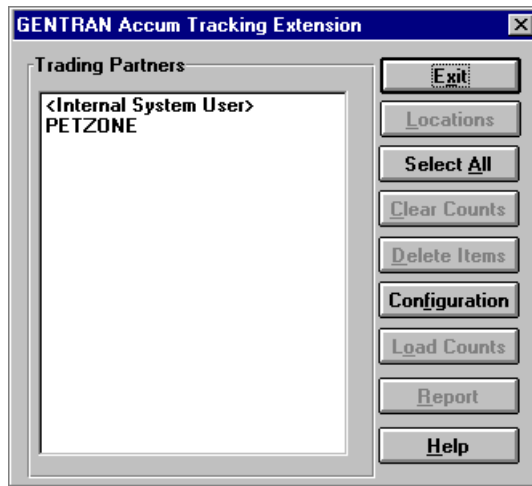
### Note

To define a new trading partner, you must use the Gentran:Director Partner Editor.

---

## Accessing the dialog box

From the Gentran:Director Tools menu, select Accum Tracking. The Partner List dialog box is displayed.





## Parts and functions

The following table lists the parts of the Partner List dialog box and their functions:

Part	Function
Trading Partners	Lists all the partner relationships currently defined in Gentran:Director. You may select one or more partners.
EXIT	Closes the Accum Tracking Extension.
LOCATIONS	<p>Accesses the Locations List dialog box for a selected partner.</p> <p><b>Exception</b> Only valid if one partner is selected.</p> <p><b>Reference</b> For more information on the Location List dialog box, see <i>Using the Location List Dialog box</i> on page 9 - 14.</p>
SELECT ALL	Selects all partner relationships in the Trading Partners list.
CLEAR COUNTS	<p>Sets the counts for all items associated with the selected partners to zero.</p> <p><b>Confirmation</b> The system prompts you for confirmation.</p>
DELETE ITEMS	<p>Deletes all trackable items associated with the selected partners.</p> <p><b>Confirmation</b> The system prompts you for confirmation.</p>
CONFIGURATION	<p>Accesses the Configuration dialog box.</p> <p><b>Reference</b> For more information, see <i>Using the Configuration Dialog box</i> on page 9-11.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>Part</b>	<b>Function</b>
LOAD COUNTS	Not currently used.
REPORT	Prints a report for all trackable items in all defined locations for the selected partners.
HELP	Displays help for the Partner List dialog box.

---

---

## Using the Configuration Dialog box

---

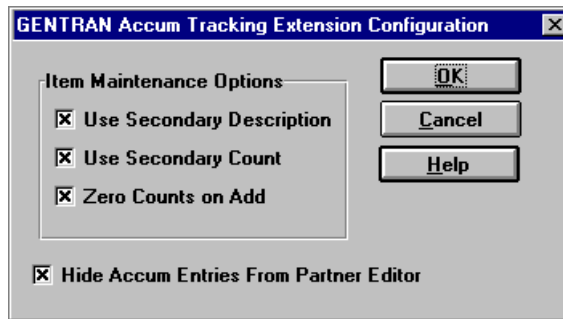
### Introduction

The Accum Tracking Extension - Configuration dialog box enables you to set global configuration options for the Accum Tracking Extension. These options are stored in the registry.

---

### Accessing the dialog box

To access the Configuration dialog box, click CONFIGURATION.



## Parts and functions

The following table lists the parts of the Configuration dialog box and their functions:

Part	Function
Use Secondary Description	<p>Specifies whether the secondary description is used for trackable items, in addition to a primary description.</p> <p><b>Note</b> This option is selected by default. Clearing this check box makes the Secondary Description box on the Item Maintenance dialog box unavailable.</p> <p><b>Reference</b> For more information, see <i>Using the Item Maintenance Dialog box</i> on page 9-18.</p>
Use Secondary Count	<p>Specifies whether the secondary count is used for trackable items, in addition to a primary count.</p> <p><b>Note</b> This option is selected by default. Clearing this check box makes the Count 2 box on the Item Maintenance dialog box unavailable.</p> <p><b>Reference</b> For more information, see <i>Using the Item Maintenance Dialog box</i> on page 9-18.</p>
Zero Counts on Add	<p>Specifies whether the counts of a new trackable item are automatically set to zero. The new trackable item counts are shown in the Count 1 and Count 2 boxes on the Item Maintenance dialog box.</p> <p><b>Note</b> This option is selected by default.</p> <p><b>Reference</b> For more information, see <i>Using the Item Maintenance Dialog box</i> on page 9-18.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

---

Part	Function
Hide Accum Entries From Partner Editor	Specifies whether the accum tracking lookup table is hidden in the Partner Editor. <b>Note</b> This option is selected by default.
OK	<ul style="list-style-type: none"><li>■ Applies the configuration settings by making the appropriate changes to the registry.</li><li>■ Closes the Configuration dialog box.</li></ul>
CANCEL	<ul style="list-style-type: none"><li>■ Discards any changes.</li><li>■ Closes the Configuration dialog box.</li></ul>
HELP	Displays help for the Configuration dialog box.

---

---

## Using the Location List Dialog box

---

### Introduction

The Accum Tracking Extension - Location List dialog box displays a list of all locations currently defined in Gentran:Director for the selected partner on the Partner List dialog box.

### Note

The Accum Tracking Extension does not allow you to define trackable items for locations which have a “PrimaryRefCode” greater than eight characters.

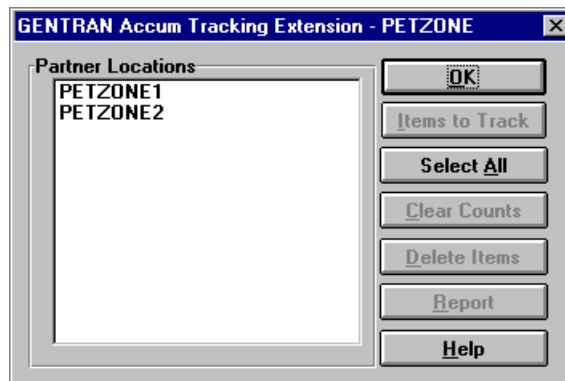
### Reference

To define a new trading partner, you must use the Gentran:Director Partner Editor.

---

### Accessing the dialog box

To access the Location List dialog box, select a partner relationship from the Partner List dialog box and click LOCATIONS.



## Parts and functions

The following table lists the parts of the Location List dialog box and their functions:

Part	Function
Partner Locations	Contains all the locations currently defined for the selected partner.
OK	Closes the Location List dialog box.
ITEMS TO TRACK	Accesses the Items List dialog box for the selected location. <b>Exception</b> Only valid if one location is selected. <b>Reference</b> For more information, see <i>Using the Items List Dialog box</i> on page 9-16.
SELECT ALL	Selects all locations in the Partner Locations list.
CLEAR COUNTS	Sets the counts for all items associated with the selected locations to zero. <b>Confirmation</b> The system prompts you to confirm the selection.
DELETE ITEMS	Deletes all trackable items associated with the selected locations. <b>Confirmation</b> The system prompts you to confirm the selection.
REPORT	Prints a report for all trackable items in all selected locations.
HELP	Displays help for the Location List dialog box.

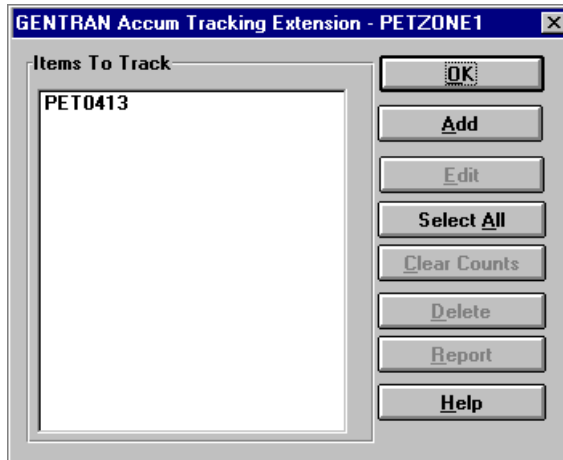
# Using the Items List Dialog box

## Introduction

The Items List dialog box displays a list of all trackable items currently defined for a selected location.

## Accessing the dialog box

To access the Items List dialog box, select a location from the Location List dialog and click ITEMS TO TRACK.



## Parts and functions

The following table lists the parts of the Items List dialog box and their functions:

Part	Function
Items to Track	Contains all the trackable items for the selected location.
OK	Closes the Items List dialog box. <i>Continued on next page</i>



Part	Function
ADD	<p>Displays a blank Item Maintenance dialog box, which allows you to define a new trackable item for this location.</p> <p><b>Reference</b></p> <p>For more information, see <i>Using the Item Maintenance Dialog box</i> on page 9-18.</p>
EDIT	<p>Displays the Item Maintenance dialog box for the selected trackable item, which allows you to edit the selected trackable item.</p> <p><b>Reference</b></p> <p>For more information, see <i>Using the Item Maintenance Dialog box</i> on page 9-18.</p>
SELECT ALL	<p>Selects all trackable items in the Items to Track list.</p>
CLEAR COUNTS	<p>Sets the counts for the selected trackable items to zero.</p> <p><b>Confirmation</b></p> <p>The system prompts you to confirm the selection.</p>
DELETE ITEMS	<p>Deletes the selected trackable items.</p> <p><b>Confirmation</b></p> <p>The system prompts you to confirm the selection.</p>
REPORT	<p>Prints a report for the selected trackable items.</p>
HELP	<p>Displays help for the Item List dialog box.</p>

# Using the Item Maintenance Dialog box

## Introduction

The Accum Tracking Extension - Item Maintenance dialog box enables you to add or edit a trackable item.

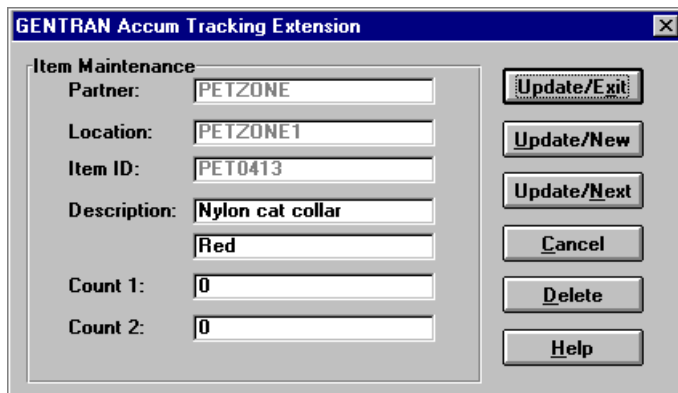
## Accessing the dialog box

Do you want to add or edit a trackable item?

IF you want to...	THEN (on the Item List dialog box)...
add an item	click ADD.
edit an item	select a trackable item from the Items to Track list, and click EDIT.

## System Response

The Item Maintenance dialog box is displayed.



## Parts and functions

The following table lists the parts of the Item Maintenance dialog box and their functions.

Part	Function
Partner	Displays the partner name of the selected partner.
Location	Displays the location name of the selected location.
Item ID	Contains the item identifier of the item you want to track. <b>Note</b> This box is mandatory.
Description	Consists of primary and secondary description boxes for the item, or a product description for the trackable item. <b>Note</b> The secondary description box is not available if the “Use Secondary Description” check box is cleared on the Configuration dialog box. <b>Reference</b> For more information, see <i>Using the Configuration Dialog box</i> on page 9-11.
Count 1 Count 2	Displays the current accum counts for the selected or new trackable item. <b>Note</b> For a new trackable item, these boxes are set to zero if “Zero Counts on Add” is selected on the Configuration dialog box. <b>Reference</b> For more information, see <i>Using the Configuration Dialog box</i> on page 9-11. <i>Continued on next page</i>

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<b>Part</b>	<b>Function</b>
UPDATE/EXIT	<ul style="list-style-type: none"><li>■ Updates or adds the current trackable item.</li><li>■ Closes the Item Maintenance dialog box.</li></ul>
UPDATE/NEW	<ul style="list-style-type: none"><li>■ Updates or adds the current trackable item.</li><li>■ Displays a blank Item Maintenance dialog box to enable you to add a new trackable item.</li></ul>
UPDATE/NEXT	<ul style="list-style-type: none"><li>■ Updates or adds the current trackable item.</li><li>■ Displays the next trackable item on the Item List dialog box.</li></ul>
CANCEL	<ul style="list-style-type: none"><li>■ Discards any changes or additions.</li><li>■ Closes the Item Maintenance dialog box.</li></ul>
DELETE	<ul style="list-style-type: none"><li>■ Deletes the current trackable item.</li><li>■ Closes the Item Maintenance dialog box.</li></ul>
HELP	Displays help for the Item Maintenance dialog box.

---

# Adding a Trackable Item

## Introduction

Before you add a trackable item with the Accum Tracking Extension, you must first verify that the following are set up in the Gentran:Director Partner Editor:

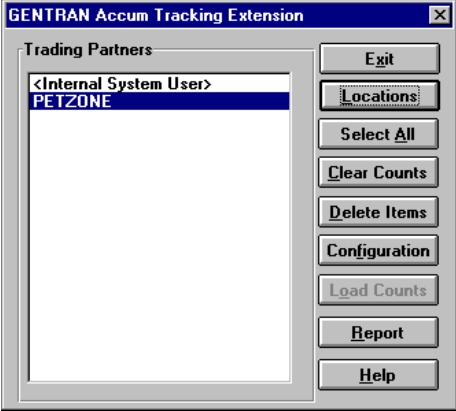
- The partner relationship for which you need to track the item.
- A location table for the specific partner relationship location for which you need to track the item.

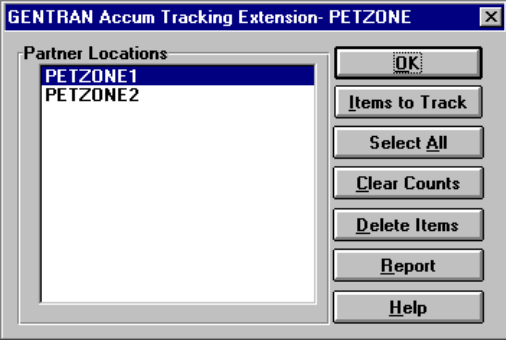
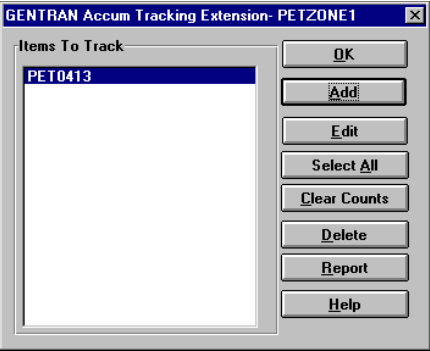
## Reference

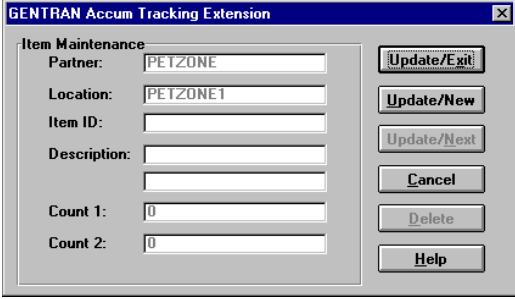
- For more information on creating partner relationships, See *Creating a New Partner Definition* on page 3-28.
- For more information on creating location tables, see *Creating Partner Locations* on page 3-87.

## Procedure

To add a trackable item, complete the following steps:

Step	Action
1	<p>In the Gentran:Director program group, double-click the Accum icon.</p> <p><b>System Response</b> The Partner List dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
2	From the Trading Partners list, select the partner relationship for which you want to set up a trackable item.
3	<p>Click LOCATIONS.</p> <p><b>System Response</b> The Location List dialog box is displayed.</p> 
4	From the Partner Locations list, select the partner location where the tracked item is sent.
5	<p>Click ITEMS TO TRACK.</p> <p><b>System Response</b> The Items List dialog box is displayed.</p>  <p style="text-align: right;"><i>Continued on next page</i></p>

Step	Action
6	<p>Click ADD.</p> <p><b>System Response</b> The Item Maintenance dialog box is displayed.</p> 
7	<p>In the Item ID box, type the part number of the item you want to track.</p>
8	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ In the first Description box, type the primary product description for the item.</li> <li>■ In the second Description box, type the secondary product description for the item.</li> </ul> <p><b>Note</b> The second Description box is not be available if the “Use Secondary Description” check box is cleared on the Configuration dialog box. For more information, see <i>Using the Configuration Dialog box</i> on page 9-11.</p>
9	<p>Do you need to add another trackable item for this location?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, click UPDATE/NEW, and repeat steps 7 - 9.</li> <li>■ If <i>no</i>, click UPDATE/EXIT and continue with step 10.</li> </ul>
10	<p>Click OK.</p> <p><b>System Response</b> The Item List dialog box is closed.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>Step</b>	<b>Action</b>
11	Click OK. <b>System Response</b> The Location List dialog box is closed.
12	Click EXIT. <b>System Response</b> The Accum Tracking Extension is closed.

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# *Daily Processing*

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# Overview

## Introduction

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### **In this chapter**

This chapter provides an example of operational activities that may be executed as part of your daily processing.

#### **Note**

This example may not be valid for your company.

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# Outbound Processing

## Understanding the Outbound Process Flow

### Process flow

An example outbound process flow is listed in the following table:

Stage	Description
1	Do one of the following: <ul style="list-style-type: none"> <li>■ Import a file from the Workspace.</li> <li>■ Create a document using the Document Editor.</li> </ul> <b>Reference</b> <ul style="list-style-type: none"> <li>■ For instructions on how to import a file, see <i>Importing a Document</i> on page 4-40.</li> <li>■ For instructions on creating a new document, see <i>Creating a Document</i> on page 4-3.</li> </ul>
2	Post the compliant documents to Out Documents. <b>Reference</b> For instructions on posting, see <i>Posting a Document</i> on page 4-35.
3	Send selected, or all documents, to your trading partner. <b>Reference</b> <ul style="list-style-type: none"> <li>■ For instructions on how to send selected documents, see <i>Sending a Document</i> on page 5-3.</li> <li>■ For instructions on how to send all documents, see <i>Sending All Documents</i> on page 5-6.</li> </ul>
4	If you expect to receive acknowledgments for the sent documents, open the Interchanges and OutDrawer browsers from The Desk.
5	Review the documents you sent to make sure you received acknowledgments for all of them. <b>Note</b> Process control can automate some tasks. For more information, See “Controlling Your Processes” in the <i>Administrator’s Guide</i> .

# Inbound Processing

## Completing Inbound Processing with Valid Documents

### Introduction

You can initiate inbound processing after sending documents using the outbound processing flow shown on the previous page, or by initiating a receive-only session.

### Reference

For instructions on receiving documents, see *Receiving a Document* on page 5-13.

### Process flow

An example inbound process flow for valid documents is listed in the following table:

Stage	Description
1	Do the following: <ul style="list-style-type: none"> <li>■ From The Desk, select In Documents.</li> <li>■ Review the valid documents you received. These documents are shown with an “OK” status.</li> </ul>
2	Print using the associated print translation object, or export the valid documents. <p><b>Note</b> Process control can automate some tasks.</p> <p><b>Reference</b></p> <ul style="list-style-type: none"> <li>■ For instructions on printing documents, see <i>Printing a Document</i> on page 4-31.</li> <li>■ For more information on exporting documents, see <i>Exporting a Document</i> on page 4-43.</li> <li>■ For more information, see “Controlling Your Processes” in the <i>Administrator’s Guide</i>.</li> </ul>

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# Completing Inbound Processing with Invalid Documents

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## Introduction

You can initiate inbound processing after sending documents using the outbound processing flow shown on page 10 - 3, or by initiating a receive-only session.

## Reference

For instructions on receiving documents, see *Receiving a Document* on page 5-13.

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## Process flow

An example inbound process flow for invalid documents is listed in the following table:

<b>Stage</b>	<b>Description</b>
1	<p>From The Desk, select ?In Documents.</p> <p><b>Note</b></p> <p>If the system cannot find an existing partner relationship for a document, the data will go to ?In Documents. The following are reasons this might occur:</p> <ul style="list-style-type: none"><li>■ There is no partner.</li><li>■ There is a partner but no relationship is set up for this document.</li><li>■ There is no template associated with the partner relationship.</li></ul> <p style="text-align: right;"><i>Continued on next page</i></p>

<b>(Cont.) Stage</b>	<b>Description</b>
2	<p>Are the documents invalid due to an incorrect or missing partner, or a missing inbound relationship or translation object?</p> <ul style="list-style-type: none"> <li>■ If <i>yes</i>, you can set up a partner relationship (if necessary) and then attach the document to a partner relationship.</li> <li>■ If <i>no</i>, continue with stage 3.</li> </ul> <p><b>Reference</b></p> <ul style="list-style-type: none"> <li>■ For instructions on creating a partner profile, see <i>Creating a New Partner Definition</i> on page 3-28.</li> <li>■ For instructions on creating an inbound relationship or selecting translation objects, see <i>Creating a New Inbound Relationship</i> on page 3-31.</li> <li>■ For instructions on attaching an interchange to a partner relationship, see <i>Attaching Interchanges to a Partner</i> on page 6-13.</li> </ul>
3	<p>Once the documents are valid, you can do the following:</p> <ul style="list-style-type: none"> <li>■ Print using the associated print translation object.</li> <li>■ Export them.</li> </ul> <p><b>Note</b></p> <p>Process control can automate some tasks.</p> <p><b>Reference</b></p> <ul style="list-style-type: none"> <li>■ For instructions on printing documents, see <i>Printing a Document</i> on page 4-31.</li> <li>■ For more information on exporting documents, see <i>Exporting a Document</i> on page 4-43.</li> <li>■ For more information, see “Controlling Your Processes” in the <i>Administrator’s Guide</i>.</li> </ul>

# *Using TDF*

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## Overview

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### **Introduction**

The Transaction Data File (TDF) serves as a bridge between your application data and the Gentran:Director translator. For outbound processing, data is imported from a TDF (or application) file and translated to EDI format using a TDF Import translation object. The data is then ready to be posted and sent to your trading partner.

For inbound processing, EDI documents that are received by Gentran:Director can be exported to a TDF-formatted file using a TDF Export translation object. This data file is then ready to be processed or converted to your internal application files.

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# Importing Data from TDF (or Application) Files

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## Introduction

TDFs provide a simple method to integrate your application with the translation capabilities of Gentran:Director. Importing data from TDF, or application data files, is an alternative to using the Document Editor to enter data directly into the system without having to define your data file import maps.

TDF is a flat file representation of the EDI standard document. Each EDI segment that is sent will be generated from a flat file record that corresponds to that segment. In order to use the TDF interface, you must reformat your application data into the standard TDF layout using an application program. In addition, you must have a TDF import translation object for the transaction set that will be imported, registered with the system.

## Getting Started

The information presented in the following sections relate to setting up your system to correctly import data from TDF files. If you have already set up this information in the system, proceed directly with the TDF (or Application) File Format procedure in this chapter.

The TDF layout and the TDF import translation object can be downloaded using the Commerce:Library facilities. Remember that once you download the translation object, it must be registered with Gentran:Director.

In addition, you must establish correct outbound relationships for all trading partners who will receive this data. During the process of establishing an outbound relationship, you should specify the name of the TDF translation object as the Import translation object for the outbound relationship.

The TDF file must contain a header record for every document in the input file. This header record is used by the system to determine what type of document is being translated and also identifies the trading partner. This header can be in one of two formats: Basic TDF Header Format or Extended TDF Header Format.

## Reference

For more information, see the “Registering (Installing) a New Translation Object” section in the Using Translation Objects chapter of this guide. For procedural information, see the “Creating a New Outbound Relationship” section in the Using Partners chapter.

## Using the Basic TDF Header Format

---

### Introduction

The limitation imposed on you if you choose to use the Basic TDF Header format is that you can only establish *one* outbound relationship per trading partner for each transaction set to be imported.

#### Note

This is the default format that is loaded for the product.

---

### Field Requirements

This format requires that the following fields are loaded correctly into the header record:

Field	Description
<b>Transaction Set ID</b> <b>Columns 1 through 6 (6 characters, left justified, space-filled)</b>	This field should contain the Transaction Set ID of the document to be imported. The Transaction Set ID is defined in the TDF translation object and the information can be obtained by viewing the translation object.  <b>Reference</b> For additional information, see the Using Translation Objects chapter in this guide.
<b>Record Tag</b> <b>Columns 7 through 17 (11 characters, zero-filled)</b>	This field identifies the record as a TDF header record and should be filled with eleven zeroes ("0").
<b>Partner ID</b> <b>Columns 57 through 71 (15 characters, left justified, space-filled)</b>	This field is used to identify the trading partner. The value used in this field should correspond exactly with the value coded as the partner's Application Code in the Partner Editor (on the Partner Definition - New dialog box).

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# Using the Extended TDF Header Format

## Introduction

The Extended format of the TDF Header record is not completely compatible with the Basic version, but it can easily be formatted with minor modifications from existing programs that create TDF files. This format allows you greater flexibility when establishing your outbound relationships because you have the ability to set up multiple outbound relationships for the same transaction set and the same trading partner. If you test a new version of a document with an existing trading partner, this header format can make that process much easier.

### Note

If you are developing a new TDF interface program, we strongly suggest that you use the Extended TDF Header format.

## Field Requirements

This format requires that the following fields are loaded correctly into the header record:

Field	Description
<b>Transaction Set ID</b> <b>Columns 1 through 6 (6 characters, left justified, space-filled)</b>	This field should contain the Transaction Set ID of the document to be imported. The Transaction Set ID is defined in the TDF translation object and the information can be obtained by viewing the translation object.  <b>Reference</b> For additional information, see the Using Translation Objects chapter in this guide.
<b>Record Tag</b> <b>Columns 7 through 17 (11 characters, zero-filled)</b>	This field identifies the record as a TDF header record and should be filled with eleven zeroes ("0").  <i>Continued on next page</i>

Field	Description
<p><b>Partner ID</b>  <b>Columns 57 through 71 (15 characters, left justified, space-filled)</b></p>	<p>This field is used to identify the trading partner. The value used in this field should correspond exactly with the value coded as the partner's Application Code in the Partner Editor (on the Partner Definition - New dialog box).</p>
<p><b>Version ID</b>  <b>Columns 114 through 125 (12 characters, left justified, space-filled)</b></p>	<p>This field is used to identify the EDI standard version of the document to be translated. This is defined in the TDF translation object. The information can be obtained by viewing the translation object.</p> <p><b>Reference</b>  For additional information, see the Using Translation Objects chapter in this guide.</p>
<p><b>Standard</b>  <b>Column 143 (1 character)</b></p>	<p>This field is used to identify the EDI standard of the document to be translated. This is defined in the TDF translation object. The information can be obtained by viewing the translation object.</p> <p><b>Reference</b>  For additional information, see the Using Translation Objects chapter in this guide.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

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Field	Description
<b>Test/Production Code</b> <b>Column 189 (1 character)</b>	<p>This field is used to identify whether to select a test or production trading partner relationship for translation (selected by clicking the <b>ADVANCED&gt;&gt;</b> button on the Outbound Relationship dialog box).</p> <p><b>STOP</b></p> <p>We suggest that you always use production outbound relationships unless you are otherwise instructed by customer support.</p> <p>If you determine that you want to use the Extended TDF Header Format, all you have to do is register the extended System Import TDF translation object. This file is located in the translation objects directory as TDFHDRX.TPL.</p> <p><b>Reference</b></p> <p>For information on registering translation objects, see the Using Translation Objects chapter in this guide.</p> <p><b>STOP</b></p> <p>Once the extended System Import TDF translation object (TDFHDRX.TPL) is registered, files containing the Basic TDF headers will not be processed correctly.</p> <p>If the extended System Import TDF translation object was registered by mistake or you want to go back to using the Basic TDF header format, register the Basic System Import TDF translation object. This file is located in the translation objects directory as TDFHDR.TPL.</p> <p><b>Reference</b></p> <p>For information on registering translation objects, see the Using Translation Objects chapter in this guide.</p>

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## Using Gentran:Director TDF Integration

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### Overview

Gentran:Director TDF Integration enables you to create an import or export translation object so that you can use TDF files with Gentran:Director. In addition, you can use TDF Integration to create a detailed report on the TDF layout of any EDI standard.

### Procedure

Use the following procedure to launch the Gentran:Director TDF Generator. For additional information, see your Gentran:Director TDF Integration Installation card.

Step	Action
1	From the Gentran:Director <b>P</b> rograms sub-menu, select Gentran Director TDF Generator.  <b>System Response</b> The Gentran:Director - TDF Integration dialog box is displayed.
2	Click <b>N</b> ext>.  <b>System Response</b> You are prompted to determine whether you want to create a TDF translation object or a TDF Record Layout Report.
3	Select the appropriate radio button, and click <b>N</b> ext>.  <b>System Response</b> The TDF Integration guides you through the creation process.

# Selecting an Import File and Translation Object

## Introduction

When the system is shipped, it is assumed that all of your imported files will be placed in the IMPORTS sub-directory and that all of the import formats will be TDF. If this is true for your company, continue with the TDF (or Application) File Import procedure later in this chapter.

Before you import a file, you must designate its file name and path, and associate that filename and path with a registered System Import translation object. To do this, you use the Imports tab of the Gentran:Director System Configuration dialog box.

## Procedure

To associate an import file name and path with the registered translation object that you want to use during the import process, complete the following steps:

Step	Action
1	From the Gentran:Director program group, select Gentran:Director Configuration.  <b>System Response</b> The System Configuration dialog box is displayed.
2	Select the Imports tab.  <b>System Response</b> The Imports tab is displayed.
3	In the File Path text box, enter the drive:\directory\subdirectory\file name of the file that you want to import, or click BROWSE to search for the file.  <b>Note</b> The default TDF setting is *.TDF and the default translation object is System Import TDF. If you enter a filename, wildcards may be used. Paths must use mapped drive letters; UNC paths are not valid.  <i>Continued on next page</i>

## Selecting an Import File and Translation Object

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<b>(Cont.) Step</b>	<b>Action</b>
4	<p>Do the following:</p> <ul style="list-style-type: none"><li>■ Select a translation object from the Translation Objects drop-down list.</li><li>■ Click OK.</li></ul> <p><b>System Response</b> The file is associated with the translation object that will be used during the import process.</p>

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1.



## Importing a TDF (or Application) File

### Procedure

To import a TDF (or application) file, complete the following steps.

Step	Action
1	From The Desk, select WorkSpace. <b>System Response</b> The WorkSpace dialog box is displayed.
2	Click IMPORT. <b>System Response</b> <ul style="list-style-type: none"> <li>■ The Application Files to Import dialog box is displayed.</li> <li>■ The system imports the documents into the WorkSpace. The document(s) either have an “OK” status indicating that the document(s) were successfully read and compliance checked or, “Not OK” indicating the document(s) failed compliance checking. You may not send non-compliant documents. Either delete those documents and re-process them from the TDF (or application data file), or correct the documents in the Document Editor if you have Data Entry translation objects for them.</li> </ul> <b>Reference</b> For more information on correcting the documents in the Document Editor, see the Using Documents chapter in this guide.
3	Select the file or files to be imported and click OK.

## Exporting Data to TDF (or Application) Files

---

### Introduction

To export data to a TDF (or application) file, an Export translation object for the transaction set must be loaded into the system, registered, and set up as the Export translation object.

### Reference

For information on translation object registration, see the Using Translation Objects chapter in this guide.

### Procedure

To export information to a TDF (or application) file, complete the following steps:

<b>Step</b>	<b>Action</b>
1	From The Desk, select the In Documents, ?In Documents, or InDrawer. <b>System Response</b> A dialog box is displayed. <i>Continued on next page</i>

<b>(Cont.) Step</b>	<b>Action</b>
2	<p>Do the following:</p> <ul style="list-style-type: none"> <li>■ Select the document or documents that are to be exported. To highlight a group of documents, click the first document, press <b>SHIFT</b>, and click the last document. To highlight several documents that are not adjacent to each other, press and hold <b>CTRL</b> while clicking each document.</li> <li>■ Click <b>EXPORT</b>.</li> </ul> <p><b>System Response</b></p> <p>The Select Export Method dialog box is displayed.</p> <p>Valid options are:</p> <ul style="list-style-type: none"> <li>■ Export to Single File - all the documents selected will be converted to TDF (if TDF files) or converted to data (if application data files), and written to a single file.</li> <li>■ Export to Default Files - the documents will be written to the files designated in the partner inbound relationship.</li> <li>■ Select File by Document - the system prompts you for the new file names.</li> </ul>

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# Glossary

- ?In Documents** A browser containing a list of documents received by the system but that failed compliance checking, or that do not have an identifiable partner or transaction set.
- ?Out Documents** A browser containing a list of documents that were imported into the system but are invalid.
- acknowledgment** The term used to indicate the ANSI 997 functional acknowledgment, the EDIA 999 acceptance/rejection advice, and the EDIFACT CNTRL.
- ack** A function that enables you to manually change the status of documents in the Out Drawer to “Ack’d” (acknowledged).
- AIAG** Automotive Industry Action Group. The standards-setting group for the automotive industry. The standards form a subset of the ANSI X12 standard.
- ANA** Article Numbering Association.
- ANSI** American National Standards Institute. ANSI sets standards for many products and services, such as safety glasses and battery capacities. The ANSI X12 committee is the chief EDI standards-setting organization for the United States.
- application system** Computer systems, outside of EDI, designed to fulfill specific business functions. Some of these include accounting, purchasing, materials control, human resources, and shipping.
- audit log** A function that enables you to view system audit log information.
- browser** A window that displays a list of items, such as documents (transaction sets), interchanges, or translation objects. A document browser displays only documents.
- click** Term indicating that you should position your cursor on top of the designated item and press and release your primary mouse button. The primary mouse button is the button you access with your index finger, regardless of whether you are utilizing right-handed or left-handed mouse operation.

**communications session** Everything sent and received to/from one telephone number in one continuous period of connection. This could include sending two or three interchange envelopes to a network, each for a different trading partner.

**Communicator** The Gentran:Director communications software. The Communicator enables you to send, receive, resend, establish communication port definitions, establish communication profiles, establish communication scripts, and view and delete communication sessions.

**compliant** Term indicating that the document conforms to the EDI standards as defined by the translation object.

**component data element** A simple data element that belongs to a composite data element. Component data elements are also called sub-elements.

**composite data element** A data element that is made up of multiple component elements.

**copy** A function that enables you to copy one or more documents from the Out Drawer to the Workspace.

**data-view windows** The following are data-view windows in the Gentran:Director: Audit Log, Document Tracking, Interchange Tracking, raw data-view of an interchange, raw data-view of a document.

**default** A predefined value – programs use these built-in values *unless* you specifically override them.

**Desk, The** A graphic representation of the Gentran:Director that provides you with a quick and easy way to access some of its most commonly used browsers, functions, and subsystems. You can click the appropriate part of The Desk any time you need to access a browser, function, or subsystem represented there. The browsers you can access are In Documents, ?In Documents, Workspace, Out Documents, ?Out Documents, Interchanges, In Drawer, and Out Drawer. Each browser icon displays a graphic representation of paper if the document location contains documents. The Desk also allows you to access the Partner Editor subsystem, the Help system, the Process Control function (clock icon), and the Send/Receive functions (phone icon). It also allows you to quit Gentran:Director (EXIT/door icon).

You can turn the display of The Desk *off* by clicking The Desk on the View menu. This toggles the display of The Desk “on” and “off.” A checkmark next to that item means it is “on.”

- dialog box** A dialog box (or dialog) containing additional information or options that you need to act on. If you specify any options, you can select a button to execute the command. Some dialog boxes display warnings or messages indicating why a requested task cannot be accomplished. If the dialog box has a title bar, you can move it to another location on your desktop.
- To close a dialog box, double-click the Control menu box or select Close Active Window from the File menu.
- document** One transaction set containing actual data and treated as a single entity. The amount of data does not affect whether something is a document or not, only the fact that it is treated as a single entity. For example, regardless of whether a purchase order contains one item or ten thousand, if it is one purchase order, it is one document.
- If a trading partner sends you a communication containing 10 purchase orders, you have received 10 documents. If the communication contained 15 invoices, you have received 15 documents.
- double-click** This indicates that you should position your cursor on top of the designated item and quickly press and release your primary mouse button twice. The primary mouse button is the button you access with your index finger, regardless of whether you are utilizing right-handed or left-handed mouse operation.
- EANA** International Article Numbering Association, Brussels, Belgium.
- EDI** Electronic Data Interchange. The process by which companies can exchange business documents directly from application to application by computer, without paper documents being produced.
- EDI standard** The rules, or standard, for turning a business document into an EDI document.
- EDIA** The Electronic Data Interchange Association, formerly known as the Transportation Data Coordinating Committee (TDCC).
- EDIFACT** Electronic Data Interchange for Administration, Commerce, and Transport.

**element** The smallest piece of usable information defined by the standards. Examples might include a quantity, unit price, or description.

An individual element can have somewhat different meanings depending on context. Therefore, elements are normally not considered to have useful meaning until they are combined into segments.

The three types of data elements are illustrated in the following table:

<b>Data Element</b>	<b>Definition</b>
Simple data element	A single piece of information defined by the standards.
Composite data element	A data element that is made up of multiple component elements.
Component data element	A simple data element that belongs to a composite data element. Component data elements are also called sub-elements.

**envelope** A way of separating information in transmissions for ease of processing. Each envelope contains a header segment and a trailer segment, which separate the envelope from other envelopes and provide information about the contents of the envelope.

The three levels of envelopes are illustrated in the following table:

<b>Envelope</b>	<b>Definition</b>
Transaction Set	Each transaction set, or business document, is contained within a transaction set envelope.
Functional Group	An envelope containing related business documents. The standards define which transaction sets should be placed together into a functional group envelope.

*Continued on next page*



Envelope	Definition
Interchange Envelope	<p>All material being sent to one trading partner in one communication. Interchange Envelope is the term used by ANSI. EDIA uses the term Transmission Envelope to refer to this level of envelope. Since we use the term transmission for other uses, we refer to Interchange Envelope only.</p> <p><b>Note</b> A communications session could easily include a number of interchange envelopes. For this reason, the standards-setting bodies are considering a fourth level of envelope to cover an entire communications session.</p>

**export** A function that enables you to write a document or documents to an external file for processing by another application. There must be a system export translation object for the document or a partner-specific export translation object for the document.

**find** A function that enables you to find specified text in the active data-view window.

**functional group** A group of transaction sets that the standards-setting body, such as ANSI, has defined as fitting together with other related transaction sets. An example might be a Functional Group defined as containing all purchasing transaction sets.

**import** A command that enables you to import data from an external application file. Depending on the content of the file, the system may prompt you for partner, transaction, or translation object information.

**In Documents** A browser containing a list of documents that the system received, but that have not yet been processed by the user. Once the documents are processed, meaning printed or exported, they are transferred to the In Drawer.

**In Drawer** A browser containing a list of documents that were received and processed.

**interchange** Contains all the functional groups of documents, or transaction sets, sent from one sender to one receiver in the same transmission.

- Interchanges browser** A browser that enables you to view a hierarchical list of all the interchanges that were sent or received. The Interchanges browser can always be accessed. It contains status information about the interchanges, such as whether or not a functional acknowledgment was received and the status of that acknowledgment. This browser also enables you to access the documents within the interchanges.
- label** Descriptions of information. They can be almost anything on a translation object that is not an element, a keyword title, or an information indicator. They can also be things used as information dividers, such as a line of dashes.
- menu** A list of items from which you can choose. Each item represents a command. Unavailable items on a menu are dimmed to inform you they are disabled.
- menu bar** Contains the list of menus for the application.
- move** A function that enables you to move a document or group of documents either from the In Documents or ?In Documents to the In Drawer or from the ?Out Documents to the Workspace.
- network** A service, such as Commerce:Network, that accepts and holds transmissions from companies until it is convenient for a trading partner to accept them. It is also known as a Third Party Network or Value-Added Network (VAN).
- ODETTE** The Organization for Data Exchange by Tele-Transmission in Europe.
- Out Documents** A browser that contains a list of documents ready to be sent. After the documents are successfully sent, they are automatically transferred to the Out Drawer.
- Out Drawer** A browser that contains a list of documents that were successfully sent out by the system.
- partner** Another firm with which your company trades documents. Also referred to as a trading partner.
- Partner Editor** A function that enables you to define, edit, and delete all partner information for your company and all of your trading partners.
- post** A function that enables you to move compliant documents from the Workspace to the Out Documents.






- predefined** A default value for a particular element on a data entry translation object. You can change the value as necessary.
- print** A command that enables you to print an unformatted or formatted version of the selected documents using the print translation object set up in the partner relationship for those documents, or print a summary list of the documents.
- printout** The result of data received from a trading partner passing through a print translation object. You do not have to actually print the data. The printout could be to a file on your hard disk.
- receive** A function that enables you to manually initiate a communications session to receive data from your trading partner.
- respond** A function that enables you to create a turnaround document, using the Turn Around translation object in the partner relationship, in response to one or more selected documents in the In Drawer.
- responsible agency** An organization that develops and updates standards for EDI communications. These organizations include ANSI, EDIA, AIAG, UCS, and VICS.
- segments** A number of elements combined to communicate useful data. For example, a catalog price segment might consist of elements for item description, volume, price, and lead time. By themselves, none of these elements would communicate useful information. Together, they provide the information necessary for someone to tell if the item is what they want, or whether the price is reasonable. Segments are defined by the EDI standards. A number of segments together form a transaction set.
- send** A function that enables you to manually start a communications session to send data to your trading partner. Only selected documents are enveloped and sent. If no documents are selected, ALL documents are sent. Successfully sent documents are moved to the Out Drawer.
- Send Queue** A function that enables you to display a list documents currently queued to be sent.
- set** See Transaction Set.
- sort** A function that enables you to sort the list of documents in a document browser into one of the following sequences: partner/type/name, partner/name/type, or type/partner/name.



**status** A document's or interchange's processing stage, indicated in the "Status" box. Refer to the following table for additional status information.

<b>?In Documents</b>	
	<p><b>NotOK</b></p> <p>All documents in the ?In Documents have this status. This code indicates one of the following:</p> <ul style="list-style-type: none"> <li>■ The document failed to comply with the EDI standard. If this is the cause of the error, the errors are indicated on a translator report associated with the document. Despite the fact that the document is not fully compliant, it is eligible for further processing.</li> <li>■ The received document could not be associated with a specific trading partner. If this is the case, the partner listed for the document in question is "Unknown." To associate this document and the other documents received in the interchange with a partner, attach the documents from the Interchanges browser.</li> <li>■ A suitable trading relationship or translation object could not be associated with the document. Detailed information concerning what information was used to locate the relationship and/or the translation object is listed in the audit log. To correct this problem, a valid relationship must be established using the Partner Editor and a valid export, print, or turn around translation object must be defined for that relationship.</li> </ul> <p style="text-align: right;"><i>Continued on next page</i></p>

	<ul style="list-style-type: none"> <li>■ A major error occurred while processing the interchange, functional group, or transaction level enveloping structures. This error may include header and trailer control numbers that do not match, an invalid trailer control count, or a control number sequence checking error. If any of these errors occur, they are listed on the translator report for the interchange containing the documents.</li> </ul>
<b>?Out Documents</b>	
	<p><b>NotOK</b></p> <p>This code indicates that the document does not comply with the EDI standard definition. The errors that are causing the compliance failure can be determined by viewing the translator report for the document.</p>
<b>In Documents</b>	
	<p><b>OK</b></p> <p>All documents in the In Documents have a status of "OK." These documents are fully compliant and are eligible for further processing.</p>
<b>In Drawer</b>	
	<p><b>OK</b></p> <p>This code indicates that the documents are fully compliant with the EDI standard and are eligible for further processing.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

	<p><b>NotOK</b></p> <p>This code indicates one of the following:</p> <ul style="list-style-type: none"><li>■ The document failed to comply with the EDI standard. If this is the cause of the error, the errors are indicated on a translator report associated with the document. Despite the fact that the document is not fully compliant it is eligible for further processing.</li><li>■ The received document could not be associated with a specific trading partner. If this is the case, the partner listed for the document in question is “Unknown.” To associate this document, and the other documents received in the interchange with a partner, attach the documents from the Interchanges browser.</li><li>■ A suitable trading relationship or translation object could not be associated with the document. Detailed information concerning what information was used to locate the relationship and/or the translation object is listed in the audit log. To correct this problem, a valid relationship must be established using the Partner Editor and a valid export, print, or turn around translation object must be defined for that relationship.</li><li>■ A major error occurred while processing the interchange, functional group, or transaction level enveloping structures. This error may include header and trailer control numbers that do not match, an invalid trailer control count, or a control number sequence checking error. If any of these errors occur, they are listed on the translator report for the interchange containing the documents.</li></ul> <p style="text-align: right;"><i>Continued on next page</i></p>
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<p><b>Interchanges</b></p>	<p>The Interchanges browser contains graphics that represent the interchange process status, interchange network status, interchange, group, document acknowledgment status, and document compliance status. When you highlight an entry in the Interchanges browser, an explanation of the status codes for that line is displayed in the Gentran:Director status bar.</p>
	<p><b><u>Interchange Process Status</u></b></p> <p></p> <p><b>Received</b> Indicates that the interchange was received by the system</p> <p></p> <p><b>Sent</b> Indicates that the interchange was successfully transmitted to the appropriate partner.</p> <p></p> <p><b>Ready to Send</b> Indicates that an attempt was made to send this interchange, but the communication session was not successful. This interchange is sent during the next appropriate communication session.</p> <p></p> <p><b>Queued</b> Indicates that the document is queued to send.</p> <p></p> <p><b>Hold</b> Indicates that the document is on “hold,” i.e., is not sent.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

	<p> <b>Overdue</b> Indicates that the interchange is waiting to be reconciled with an inbound functional acknowledgment but has exceeded the number of hours by which that acknowledgment is deemed late.</p> <p> <b>Send Failed</b> Indicates that the send attempt failed due to an error during the communications process.</p> <p><i>Continued on next page</i></p>
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**Interchange Network Status****On Network**

Blue dish indicates that the interchange was successfully delivered to a value-added network. (To obtain this status using Commerce:Network you must have your mailbox configured to receive the 20 report in data format).

**Network Warning**

Yellow dish indicates that the interchange was delivered to a value-added network and the network detected non-critical errors in the data. The data is available to be picked up by the designated trading partner. (To obtain this status using Commerce:Network you must have your mailbox configured to receive the 20 report in data format).








**Network Error**



Red dish indicates that the interchange was delivered to a value-added network and the network detected critical errors in the data. The data is not available to be picked up by the designated trading partner. (To obtain this status using Commerce:Network you must have your mailbox configured to receive the 20 report in data format).


**Picked Up**

Green dish indicates that the interchange was successfully delivered to a trading partner via a value-added network. (To obtain this status using Commerce:Network you must have your mailbox configured to receive the 70 report in data format).


*Continued on next page*

	 <p><b>Transmitted to third-party network</b> Black dish indicates that the interchange was transmitted to a third-party network.</p>
	<p><b><u>Interchange, Group, and Document Acknowledgment Status</u></b></p>  <p><b>Waiting</b> Indicates that the interchange is waiting to be reconciled with an inbound functional acknowledgment.</p>  <p><b>Overdue</b> Indicates that the interchange is waiting to be reconciled with an inbound functional acknowledgment but has exceeded the number of hours by which that acknowledgment is deemed late.</p>  <p><b>Rejected</b> Indicates that the interchange was acknowledged by your partner and there were errors. The interchange was rejected by your partner.</p>  <p><b>Acknowledged</b> Indicates that the interchange was acknowledged by your partner and there were no errors.</p>  <p><b>Acknowledged with Errors</b> Indicates that the interchange was acknowledged by your partner and there were errors. It was accepted by your partner in spite of the errors.</p>  <p><b>Partially Acknowledged</b> Indicates that the interchange was successfully received by the trading partner and some of the documents within the interchange were accepted or accepted with errors and other documents within the interchange were rejected.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

	<p><b><u>Document Compliance Status</u></b></p> <p></p> <p><b>OK</b></p> <p>This code indicates that the documents are fully compliant with the EDI standard and are eligible for further processing.</p> <p></p> <p><b>NotOK</b></p> <p>Red “thumbs down” indicates that this code indicates one of the following:</p> <ul style="list-style-type: none"><li>■ The document failed to comply with the EDI standard. If this is the cause of the error, the errors are indicated on a translator report associated with the document. Despite the fact that the document is not fully compliant it is eligible for further processing.</li><li>■ The received document could not be associated with a specific trading partner. If this is the case, the partner listed for the document in question is “Unknown.” To associate this document, and the other documents received in the interchange with a partner, attach the documents from the Interchange browser.</li><li>■ A suitable trading relationship or translation object could not be associated with the document. Detailed information concerning what information was used to locate the relationship and/or the translation object is listed in the audit log. To correct this problem, a valid relationship must be established using the Partner Editor and a valid export, print, or turn-around translation object must be defined for that relationship.</li></ul> <p style="text-align: right;"><i>Continued on next page</i></p>
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	<ul style="list-style-type: none"> <li>■ A major error occurred while processing the interchange, functional group, or transaction level enveloping structures. This error may include header and trailer control numbers that do not match, an invalid trailer control count, or a control number sequence checking error. If any of these errors occur, they are listed on the translator report for the interchange containing the document.</li> </ul>  <p><b>Duplicate</b> Yellow “thumbs down” indicates that the document has the same name as another document on the system.</p>
<b>Out Documents</b>	
	<p><b>OK</b> This code indicates that the document is fully compliant with the EDI standard. Documents with this status can be sent.</p>
<b>Out Drawer</b>	
	<p><b>Sent</b> This code indicates that the document was successfully transmitted to the appropriate partner.</p>
	<p><b>Waiting</b> This code indicates that the document is waiting to be reconciled with an inbound functional acknowledgment.</p>
	<p><b>Overdue</b> This code indicates that the document is waiting to be reconciled with an inbound functional acknowledgment, but has exceeded the number of hours by which that acknowledgment is deemed late.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

	<p><b>Ack'd</b> This code indicates that the document was acknowledged by your partner and there were no errors.</p>
	<p><b>AckErr</b> This code indicates that the document was acknowledged by your partner and there were errors, but it was accepted by your partner in spite of the errors.</p>
	<p><b>Reject</b> This code indicates that the document was acknowledged by your partner and there were errors. The document was rejected by your partner.</p>
	<p><b>~Ack</b> This status is only displayed if there were no acknowledgments expected for this document and either the group or the interchange was partially acknowledged. If your partner is going to issue partial acknowledgments at the interchange or group level, he/she should also indicate acceptance or rejection at the transaction level.</p>
	<p><b>OnNet</b> This code indicates that the document was successfully delivered to a value-added network. To obtain this status using Commerce:Network, you must have your mailbox configured to receive the 20 report in data format.</p>
	<p><b>PickedUp</b> This code indicates that the document was successfully delivered to a trading partner via a value-added network. To obtain this status using Commerce:Network, you must have your mailbox configured to receive the 70 report in data format.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

	<p><b>NetWarn</b>          This code indicates that the document was delivered to a value-added network and the network detected non-critical errors in the data. The data is available to be picked up by the designated trading partner. To obtain this status using Commerce:Network, you must have your mailbox configured to receive the 20 report in data format.</p>
	<p><b>NetErr</b>          This code indicates that the document was delivered to a value-added network and the network detected critical errors in the data. The data is not available to be picked up by the designated trading partner. To obtain this status using Commerce:Network, you must have your mailbox configured to receive the 20 report in data format.</p>
<p><b>Send Queue</b></p>	
	<p><b>Queued</b>          This code indicates that the document was successfully interchanged in preparation for sending, but the interchange was not transferred correctly to your partner. The interchange is automatically sent in the next communication session with this partner.</p>
	<p>  <b>Ready to Send</b>          Indicates that a document is ready to send but a mailbox message has not yet been created for the data.</p>
	<p><b>Send Failed</b>          Indicates that the send attempt failed due to an error during the communications process.</p> <p style="text-align: right;"><i>Continued on next page</i></p>

Workspace	
	<p><b>OK</b></p> <p>A code indicating that the document is fully compliant with the EDI standard. Documents with this status can be posted to the Out Documents and sent.</p>
	<p><b>NotOK</b></p> <p>A code indicating that the document does not comply with the EDI standard definition. You can determine the errors that are causing the compliance failure by viewing the translator report for the document.</p>

**status bar** The status bar of an application window defines information about a selection, command, or process. It also defines Menu Bar items as the user highlights each item, and indicates any current keyboard-initiated modes for typing. For example, CAP for the “Caps Lock” key or NUM for the “Num Lock” key.

**TDCC** See EDIA.

**translation object** A predesigned layout set up to ensure that input or output for a particular transaction set exists and is presented in a usable fashion. You must specify which translation objects are used by each partner relationship.

**Inbound Translation Objects:**

**Turn Around:** A translation object used when a document is received, to create the natural response document that contains as many elements from the received document as possible.

**Export File:** A translation object that indicates when a document is received, it is exported to a specified file format.

**Print:** A translation object used to print documents.

**Outbound Translation Objects:**

**Import:** A translation object used to import data from an application file.

**Print:** A translation object used to print documents.

**Data Entry:** A translation object used to enter data into the Document Editor facility.

**third-party network** See Network.

- title bar** Part of an application window containing the name of the application and enables you to move the window to another position on your desktop.
- toolbar** Contains buttons that graphically represent commands available in the Menu Bar. This function displays tracking information for a single selected document.
- track** Function that displays tracking information for a single selected document.
- TRADACOMS** The U. K. standards for EDI that are published by the Article Numbering Association (UK) LTD.
- trading partner** Another firm with which your company trades documents. Also referred to as a partner.
- transaction set (document)** A business form as defined by the standards. Examples include an ANSI 850 purchase order or a UCS 880 invoice. The standards define each transaction set in terms of the segments and elements that make up the form, the order in which they appear, and the relationships among them. This is also known as “message” in Europe.
- transmission** See Communications Session.
- transmission chain** A path an EDI communication could follow, including one company, one trading partner, and one or more network services.
- turnaround document** A document into which data elements from the source document have been automatically transferred using a turnaround map.
- turnaround map** A series of instructions that the system uses to create a turnaround document (a logical response document to the source) from an inbound (source) document, by transferring data from the source document to elements in the target document (translation object).
- UCS** Uniform Communications Standard. The standard used by the grocery industry.
- UnPost** This function enables you to move a document previously posted to the Out Documents back to the Workspace for further processing.
- version** Each standards-setting body updates its standards on a regular basis. Each formal update is referred to as a version.



- view** For documents, this function enables you to display the raw EDI data, a formatted document using a translation object, or a translator report, depending on the format selected. For interchanges, this function enables you to display the raw EDI data or a translator report, depending on the format selected.
- VICS** The Voluntary Inter-industry Communication Standards is the standards-setting body for the retail industry, a subset of ANSI X12.
- Workspace** The Workspace contains a list of outbound “Work in Progress” documents. It also contains recently imported or data entry documents.
- X12** The ANSI committee that sets and publishes standards for EDI.



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