

Whitepaper

Gentran:Director
Creating a New Partner Profile for Customers Requiring
Data Entry Forms, Print Forms, and TDF Import and Export in the
ANSI X12 format

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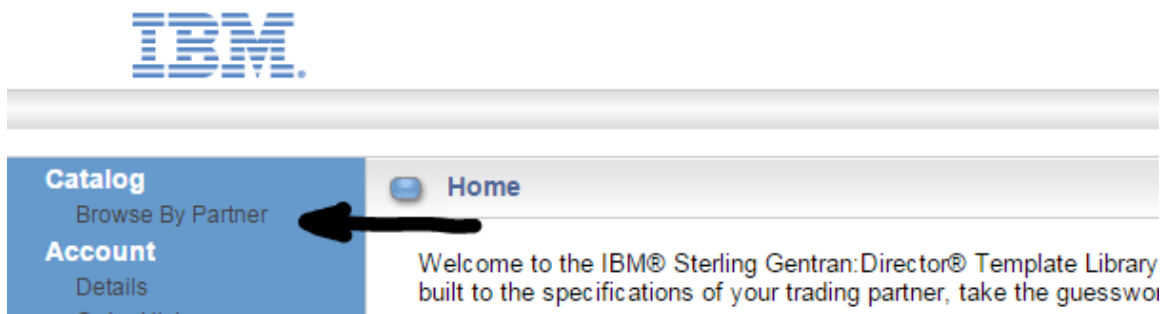
Gentran:Director New Partner Setup Process

STEP ONE: *Download the Templates (aka Translation Objects) Needed*

1. Login to the website <https://cn.sterlingcommerce.com/login.jsp> .
2. On the left navigation bar select: IBM Sterling Library



3. Click the Browse By Partner link.



4. Select a letter to view all trading partners beginning with that letter. (e.g., Select the letter "S" to view items for Safeway or select the letter "G" for Generic to see the TDF import/Export Templates)
5. Click the trading partner name to view products related to that trading partner.
6. Find the desired item and make note of the catalog number.
7. Click the Add to Cart link for each individual item desired.
8. In order to browse for other trading partners, click the Return button and repeat Steps 4-7.
9. Once all desired items have been selected, click on the View Cart link at the top of the page.
10. Verify that each of the items in the shopping cart is correct.
11. Click Checkout.
12. Click Confirm Order.
13. Click the download link for one of the selected items.
14. Click the Save button on the File Download window.
15. Click the Save In list box and locate the proper folder on your local drive.
 - Version 5.5 use C:\DirectorConnection\transobj
 - Version 5.4 use C:\Program Files\CommerceConnection32\transobj
16. Click the Save button. The item downloads and is saved in the folder.
17. Repeat Steps 13-16 to download any additional items that were purchased.
18. Click Log Off.
19. Using Windows Explorer, go to the directory noted in step 15.
20. One at a time, double click each of the files downloaded to unzip them.

Note that the zip files for the TDF Import and Export translation objects will contain a File Layout Record in a text (*.txt) file as well as the translation object (*.tpl) file.

The .exe files are self-extracting zip files. There are many tools available to unzip the files. A popular one is 7zip and it is open source.

21. Open Gentran Director and go to View↗Translation Objects.
22. Click New and find the templates you just downloaded and register them.

STEP TWO: *Create the Basic Shell for the Partner in Gentran: Director*

1. Open the PARTNER EDITOR by clicking on the Partner Drawer or by selecting it from the TOOLS menu.
2. Click New
3. Complete the fields in Partner Definition window:
 - Use F1 Help Key for field definitions
 - Application Code field may be left blank unless using TDF format
 - EDI code is the Sender ID of the trading partner
 - Use the drop down arrow to select a Comm Profile
4. After completing the Partner Definition Window, click Save>Exit (**it will appear as though the information entered has been blanked out, it has not. Click Exit on this box and the newly-created Partner Profile will be shown on the Partner Editor list.**)

STEP THREE: *Setting up a new Inbound Relationship*

1. Highlight the New Partner.
2. Click Inbound.
3. Click on New. Name the relationship something easily recognized (for example 850 PO 4010).
4. Click Save.
5. Using the drop-down arrows, select the Standard and Version of the inbound document that will be received from the new partner.
6. For Transaction Set, select the document number (for example 850)
7. Click on Translation.
8. Select the appropriate translation object using drop down arrows next to Turnaround, Export, and/or Print. If Turnaround is selected, check the Auto Button. Auto implies running the translation as its brought in verse waiting for a process control session to trigger the activity.
9. Click on Save.
10. Click on Advanced and select Test or Production.
11. Click on Groups.
12. Click on New. Name the group (for example 850 PO 4010).
13. Verify the Functional Group Id. *
14. Click on Save.
15. Click on Select.
16. Click on Interchanges.

17. Click on New. Name the interchange (for example 850 PO 4010).
18. Click on Save> Click on Select.
19. Click on Save to save the entire relationship.
20. Click on Exit.

Click on Exit to close the Partner Editor.

STEP FOUR: <i>Setting up a new Outbound Relationship</i>

1. Open the Partner Editor by clicking on the Partner Drawer, or by selecting it from the Tools menu.
2. Highlight the partner
3. Click on Outbound.
4. Click on New. Name the relationship something easily recognized (for example the document name with the version).
5. Click on Save.
6. From the drop-down boxes, select the Standard and Version of the Outbound document.
7. Select the Transaction Set number from the drop-down box.
8. Click on Translation; Select the translation object under Data entry or Import or Print.
9. Click on Save.
10. Click on Advanced and set the test/production indicator.
11. Click on Groups.
12. Click on New. Name the Group.
13. Enter the Functional Group Id* if it is not filled in from the template.
14. Click on Envelope.
15. Fill in the fields as agreed upon with the trading partner
16. Click on Save. Click on Save again.
17. Click on Select.
18. Click on Interchanges.
19. Click on New. Name the Interchanges.
20. Click on Envelope.
21. Fill in the fields as agreed upon with the trading partner.
22. Click on the Test/Production indicator if this is a ISA or ICS header.
23. Click Save
24. Click Save again.
25. Click Select
26. Click Save to save the entire relationship
27. Click on EXIT to close the Partner editor.

*** Sampling of Functional Group ID's and Transaction #**

AA	Account Analysis (822)
AL	Set Cancellation (998) and Application Accept/Reject Advice (499)
AN	Return Merchandise Authorization and Notification (180)
AR	Warehouse Stock Transfer Shipment Advice (943)
AS	Transportation Appointment Schedule Information (163)
AW	Warehouse Inventory Adjustment Advice (947)
BE	Benefit Enrollment and Maintenance (834)
BL	Motor Carrier Bill of Lading (211)
BS	Shipment and Billing Notice (857)
CA	Purchase Order Change Acknowledgment/Request - Seller Initiated (865)
CD	Credit/Debit Adjustment (812)
CF	Corporate Financial Adjustment Information (844 and 849)
CG	Administrative Message (994)
CI	Consolidated Service Invoice/Statement (811)
CN	Coupon Notification (887)
CO	Cooperative Advertising Agreements (290)
CP	Electronic Proposal Information (251, 805)
CR	Rail Carhire Settlements (414)
CS	Cryptographic Service Message (815)
CT	Application Control Totals (831)
D5	Contract Payment Management Report (568)
DA	Debit Authorization (828)
DF	Market Development Fund Allocation (883)
DI	Dealer Information (128)
DX	Direct Exchange Delivery and Return Information (894, 895)
ED	Student Educational Record (Transcript) (130)
ER	Revenue Receipts Statement (170)
ES	Notice of Employment Status (540)
FA	Functional Acknowledgment (997)
FB	Freight Invoice (859)
FG	Freight Invoice (859)
FH	Motor Carrier Tariff Information (218)
FR	Financial Reporting (821, 827)
FT	File Transfer (996)
GC	Damage Claim Transaction Sets (920, 924, 925, 926)
GE	General Request, Response or Confirmation (814)

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GF Response to a Load Tender (990)
GL Intermodal Group Loading Plan (715)
GP Grocery Products Invoice (880)
HB Eligibility, Coverage or Benefit Information (271)
HC Health Care Claim (837)
HI Health Care Services Review Information (278)
HP Health Care Claim Payment/Advice (835)
HS Eligibility, Coverage or Benefit Inquiry (270)
IA Air Freight Details and Invoice (110, 980)
IB Inventory Inquiry/Advice (846)
IC Rail Advance Interchange Consist (418)
ID Insurance/Annuity Application Status (273)
IE Insurance Producer Administration (252)
IG Direct Store Delivery Summary Information (882)
IJ Report of Injury, Illness or Incident (148)
IM Motor Carrier Freight Details and Invoice (210, 980)
IN Invoice Information (810,819)
IO Ocean Shipment Billing Details (310, 312, 980)
IP Intermodal Ramp Activity (622)
IR Rail Carrier Freight Details and Invoice (410, 980)
LN Property and Casualty Loss Notification (272)
LS Asset Schedule (851)
MA Motor Carrier Summary Freight Bill Manifest (224)
MD Department of Defense Inventory Management (527)
ME Mortgage Origination (198, 200, 201, 261, 262, 263, 833, 872)
MF Market Development Funds Settlement (884)
MG Mortgage Servicing Transaction Sets (203, 206, 260, 264,266)
MH Motor Carrier Rate Proposal (106)
MI Motor Carrier Shipment Status Inquiry (213)
MS Material Safety Data Sheet (848)
NC Nonconformance Report (842)
NL Name and Address Lists (101)
OR Organizational Relationships (816)
OW Warehouse Shipping Order (940)
PA Price Authorization Acknowledgment/Status (845)
PC Purchase Order Change Request - Buyer Initiated (860)
PD Product Activity Data (852)
PF Annuity Activity (268)

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PJ Project Schedule Reporting (806)
PK Project Cost Reporting (839) and Contractor Cost Data Reporting (196)
PO Purchase Order (850)
PR Purchase Order Acknowledgment (855)
PS Planning Schedule with Release Capability (830)
PT Product Transfer and Resale Report (867)
PV Purchase Order Shipment Management Document (250)
QG Product Information (878, 879, 888, 889, 893, 896)
QM Transportation Carrier Shipment Status Message (214)
QO Ocean Shipment Status Information (313, 315)
RA Payment Order/Remittance Advice (820)
RC Receiving Advice/Acceptance Certificate (861)
RD Royalty Regulatory Report (185)
RE Warehouse Stock Receipt Advice (944)
RI Routing and Carrier Instruction (853)
RL Rail Industrial Switch List (423)
RN Requisition Transaction (511)
RO Ocean Booking Information (300, 301, 303)
RP Commission Sales Report (818)
RQ Request for Quotation (840) and Procurement Notices (836)
RR Response to Request For Quotation (843)
RS Order Status Information (869, 870)
RT Report of Test Results (863)
SA Air Shipment Information (104)
SC Price/Sales Catalog (832)
SE Shipper's Export Declaration (601)
SG Receiving Advice - Grocery (885)
SH Ship Notice/Manifest (856)
SI Shipment Information (858)
SM Motor Carrier Load Tender (204)
SP Specifications/Technical Information (841)
SQ Production Sequence (866)
SR Rail Carrier Shipment Information (404, 419)
SS Shipping Schedule (862)
SU Account Assignment/Inquiry and Service/Status (248)
SW Warehouse Shipping Advice (945)
TA Electronic Filing of Tax Return Data Acknowledgment (151) or TA1 segment
TD Trading Partner Profile (838)

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TF	Electronic Filing of Tax Return Data (813)
TM	Motor Carrier Delivery Trailer Manifest (212)
TO	Real Estate Title Services (197, 199, 265)
TS	Transportation Services Tender (602)
TX	Text Message (864)
UA	Retail Account Characteristics (885)
UC	Uniform Commercial Code Filing (154)
UP	Motor Carrier Pick-up Manifest (215)
VA	Vehicle Application Advice (126)
WA	Product Service Transaction Sets (140, 141, 142, 143)
WB	Rail Carrier Waybill Interchange (417)
WR	Shipment Weights (440)
IM	Motor Carrier Freight Details and Invoice (210, 980)
QM	Transportation Carrier Shipment Status Message (214)
SM	Motor Carrier Load Tender (204)
IA	Air Freight Details and Invoice (110, 980)
MA	Motor Carrier Summary Freight Bill Manifest (224)
SA	Air Shipment Information (104)
IR	Rail Carrier Freight Details and Invoice (410, 980)
MR	Multilevel Railcar Load Details (125)
SR	Rail Carrier Shipment Information (404, 419)
IO	Ocean Shipment Billing Details (310, 312, 980)
QO	Ocean Shipment Status Information (313, 315)
RO	Ocean Booking Information (300, 301, 303)
SO	Ocean Shipment Information
AG	Application Advice (824) or Accept/Reject (999)
DX	Direct Exchange Delivery and Return Information (894, 895)
IG	Invoice (880)
OG	Order Group - Grocery (875, 876)
PD	Product Activity Data (852)
QG	Product Information (878, 879, 888, 889, 893, 896)
AR	Warehouse Stock Transfer Shipment Advice (943)
AW	Warehouse Inventory Adjustment Advice (947)
OW	Warehouse Shipping Order (940)
RE	Warehouse Stock Receipt Advice (944)
SW	Warehouse Shipping Advice (945)