

Gentran:Server® for Windows®

User's Guide

Version 5.2



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Gentran:Server for Windows

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Introduction

Welcome Welcome to Gentrans:Server[®] for Windows[®], the Sterling Commerce Electronic Data Interchange (EDI) software for the Windows operating system.

Gentrans:Server provides you with the easy-to-use tools you need to electronically exchange data with your trading partners, including:

- Data translation
- Process control
- Communications system

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

What's in this Manual

Introduction This manual is intended to support the online Help by assisting you in performing various tasks in Gentran:Server. This task-oriented approach is intended to answer any questions you may have about Gentran:Server with step-by-step instructions.

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
- Configuring and using unattended processing

Prerequisite knowledge This manual assumes that you are familiar with using a PC and with Microsoft® Windows or Windows 2000 functions.

Description of contents This *User's Guide* contains the following chapters:

- *Chapter 1, Getting Started*, explains the content, organization, and conventions in this guide. This chapter also describes how to get technical support introduces Gentran:Server for Windows.
- *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 and export a partner profile and partner tables, and describes how to copy a partner profile.
- *Chapter 4, Using Documents*, explains all 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, how to attach (link) an interchange to a partner, and how to resend interchanges.
- *Chapter 7, Using External Data*, explains how to view and print external data files.

(Continued on next page)

Description of contents (contd)

- *Chapter 8, Using Acknowledgements*, explains how to manually set a document, group, or interchange to acknowledged, how to define inbound and outbound acknowledgement criteria for document reconciliation, and how to check for overdue acknowledgements.
- *Chapter 9, Using Tracking*, explains how to view and print tracking information.
- *Chapter 10, Using Archive and Restore*, explains how to archive data and restore archived data to the system.
- *Chapter 11, Using Process Control*, explains how to create, edit, delete, activate, and suspend automatic process control events. This chapter also describes how to use sessions and calendars.
- The *Glossary* contains definitions of EDI and Gentran:Server terms and concepts.

Online Help

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

Getting Support

Introduction The Sterling Commerce Gentran:Server software is supported by trained product support personnel who are available to help you with product questions or concerns.

Note

Gentran:Server Customer Support does not support non-Sterling Commerce products (such as SQL Server and Oracle), but can assist you in configuring non-Sterling Commerce products to work with Gentran:Server.

Phone number For assistance, please refer to the *Getting Started Guide* to determine which support phone number you should use.

Before calling support To help us provide prompt service, we ask that you do the following:

- Attempt to recreate any problem that you encounter and record the exact sequence of events.
- When you call product support, you should be prepared to provide us with the information below.

Information	Description
Identification	Your company name, your name, telephone number and extension, and the case number (if the question refers to a previously reported issue)
System Configuration	The Gentran:Server version (and any service packs installed) and information about the primary Gentran system controller and all machines experiencing problems, including the Windows operating system version, amount of memory, available disk space, database version, Microsoft Data Access (MDAC) version, and Internet Explorer version Also, please describe any recent changes in your hardware, software, or the configuration of your system.
System Data Store	Which machines contain folders in the system data store? (Continued on next page)

Information	Description
Error Messages	Record the exact wording of any error messages you receive and the point in the software where the error occurred, as well as any log files.
Attempted Solutions	Record any steps that you took attempting to resolve the problem and note all the outcomes. Provide an estimate on how many times the problem occurred and whether it can be reproduced.

Accessing the Sterling Commerce Support Web Site

The Sterling Commerce Customer Support Web Site contains valuable information about getting support for Gentran:Server for Windows, including the following:

- Scope of support services
- Customer support policies
- Call prioritizing
- Customer support phone directory
- Creating new Support on Demand cases
- Checking the status of Support on Demand cases
- Adding information to Support on Demand cases

The Customer Support Web site is constantly updated and all Sterling Commerce customers have access to it. This web site also contains the most recent product updates and is a valuable source of product information.

Reference

Refer to the *Getting Started Guide* for information about how to access the Customer Support Web site.

Documentation

The Customer Support Web site contains a documentation library, which contains the entire Gentran:Server for Windows documentation set. You can download the product manuals in PDF format from this library at any time.

Getting Started

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 - ▶ Changing your Password1 - 14
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Introducing Gentran:Server for Windows

Overview Gentran:Server for Windows is a combined data translation, process control, and communication system that operates within the Microsoft Windows environment. This product is primarily designed for the translation and communication of EDI and other similar types of data.

Through the process control system, you can integrate Gentran:Server with a wide variety of business applications in a manner that makes it a complementary extension of the applications, rather than a cumbersome add-on.

System components The Gentran:Server system consists of several logical components. Gentran:Server can be deployed in many ways in this environment through a combination of a database, system data store, process controllers, communication controllers, and user interface clients.

Mandatory components

Each system must have a *primary Gentran system controller*, *system data store*, and a *database*.

Database The *database* is the relational database that Gentran:Server uses to store system data. This database enables multiple users to access the same data. The other components of the product interact with this database using ODBC™ (Open Database Connectivity), which allows for many different database management systems on the database controller.

Reference

See the *Getting Support* card to determine which database management systems have been certified for use with Gentran:Server.

System data store The *system data store* serves as the repository of all shared Gentran:Server data. The system data store may reside on any machine that is a file server to the machines in the Gentran:Server system. There is only one system data store in the Gentran:Server system, but the associated folders and files may be distributed across multiple machines, if necessary.

Note

The machines where the system data store resides must be accessible by all machines in the Gentran:Server system.

**Process
Controllers**

There are two types of *controllers* in the Gentran:Server system:

- A single primary system controller
- One or more secondary controllers (if required)

**Primary system
controller**

The *primary system controller* controls the management and dispatching of processing requests within the system, manages the audit functionality, and controls all other system components.

**Secondary
controllers**

If you purchased a distributed license, you can deploy additional controllers (*secondary controllers*) across the Windows network to allow the processing load to be distributed for fast and efficient throughput. The secondary controller can be either or both of the following:

Process controller

The *process controllers* provide similar functions to the primary system controller. They are controlled by the primary system controller and are used to distribute processes across multiple machines in a Windows network.

Communication controller

The *communication controllers* regulate communication between Gentran:Server and the organizations (value-added networks (VANs) or trading partners) with whom data is exchanged. The communication controllers can support leased or dialed connections, as well as interaction with third-party communication packages using the file interface capability.

A communication controller is installed via a communications gateway.

**User interface
clients**

The *user interface clients* provide the functions that are necessary to monitor and control the system. The main data management component provides a graphical user interface to the following:

- Document locations
 - Partner profiles
 - Communication setup and logs
 - System Audit Log
 - Process control setup and management
-

User interface client components

The five main components of the Gentran:Server user interface client are the following:

- The **Electronic Commerce (EC) Manager** window is a data management component that serves as a high-level navigation tool, as well as a document management tool. The EC Manager also provides access to the Partner Editor, the Document Editor, Application Integration, and Forms Integration.
- **Partner Editor** allows you to define, edit, and delete all partner information for your company and for all of your trading partners.
- **Document Editor** is your data entry tool. It allows you to create, modify, and view documents.
- **Application Integration** is a subsystem that enables you to generate import, export, and document turnaround translation objects.
- **Forms Integration** is a subsystem that enables you to generate screen entry and print translation objects.

Logical components

The user interface client and controller components are the logical components of the Gentran system. These components can be deployed on a single machine or over a number of machines, depending on your needs.

Typical system

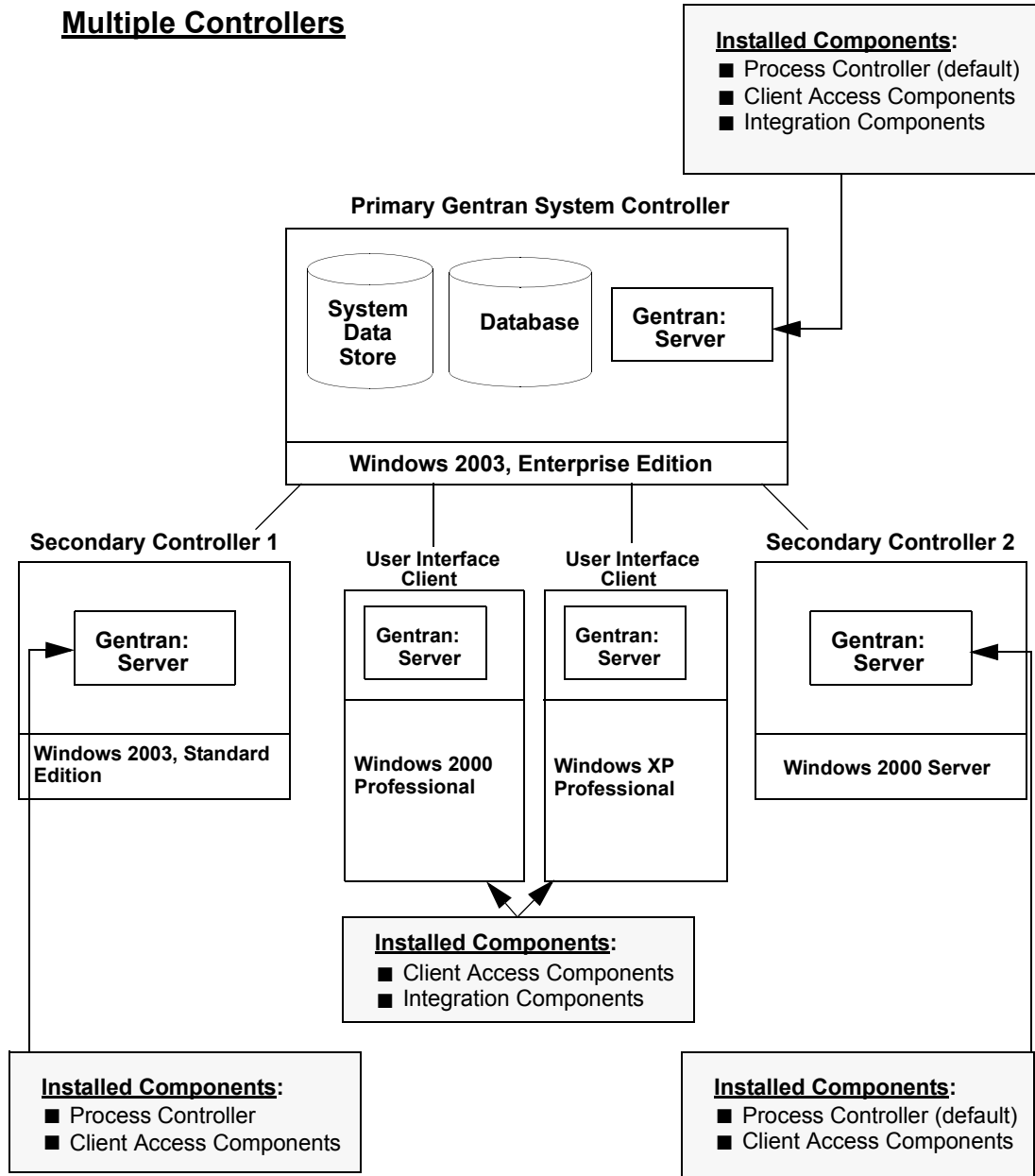
Typically, your system initially consists of a small number of machines operating as Gentran:Server user interface clients, and a larger, more powerful machine operating as a combined primary system controller/communication controller/process controller.

After you complete the necessary translation objects for your installation (using Application Integration), you can add other process controllers and communication controllers as required, to distribute the processing workload.

(Continued on next page)

Logical components (contd) **System component interaction diagram**
 The following diagram illustrated the interaction of the logical components of the Gentran:Server system:

Multiple Controllers



Navigating in Gentran:Server

Overview The Gentran:Server Electronic Commerce (EC) Manager window allows you to access its functionality in the following ways:

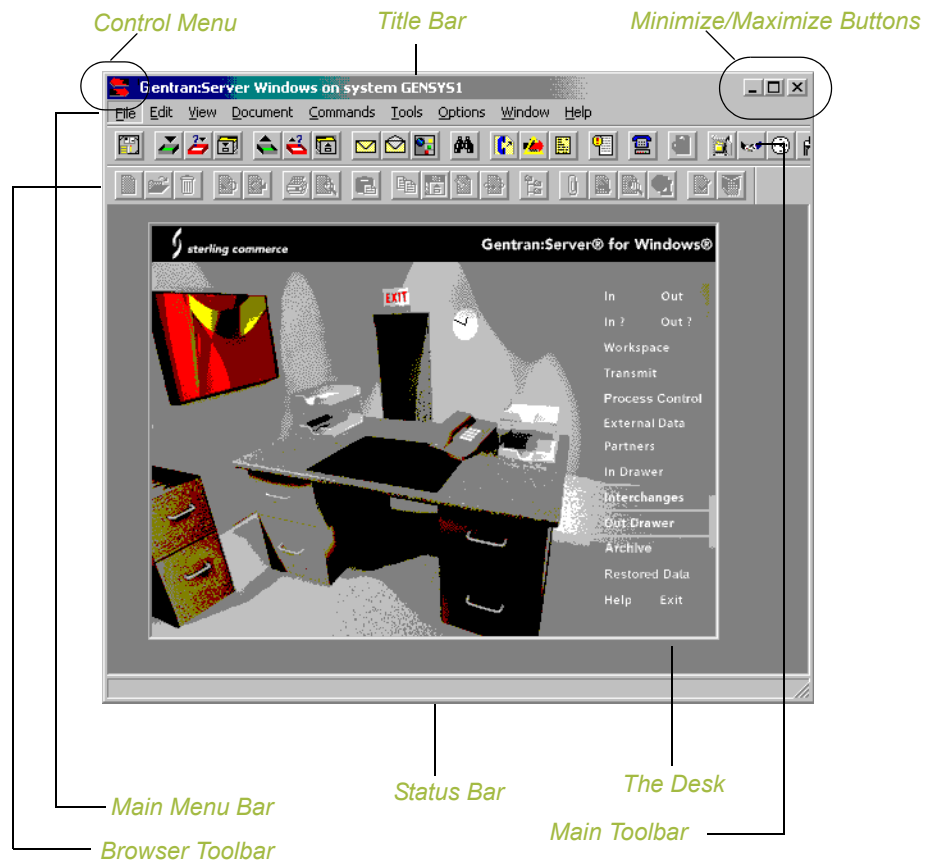
- Select the menu option from the Main Menu Bar.
- Click the appropriate button on the Main Toolbar.
- Click the appropriate button on the Browser Toolbar.
- Click the appropriate part of The Desk.
- Click the appropriate button within a chosen browser window.

Note

The Electronic Commerce Manager display is refreshed when you press **F5** or click **Refresh** (available on most browsers).

Electronic Commerce Manager window

The following illustrates the Gentran:Server EC Manager window:



Components The following are the components of the main Gentran:Server window:

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 and, on the Gentran:Server desktop, it displays the name of the system you are logged in to. You can use this to move the position of the Gentran:Server EC Manager window on your desktop.

Minimize/Maximize buttons

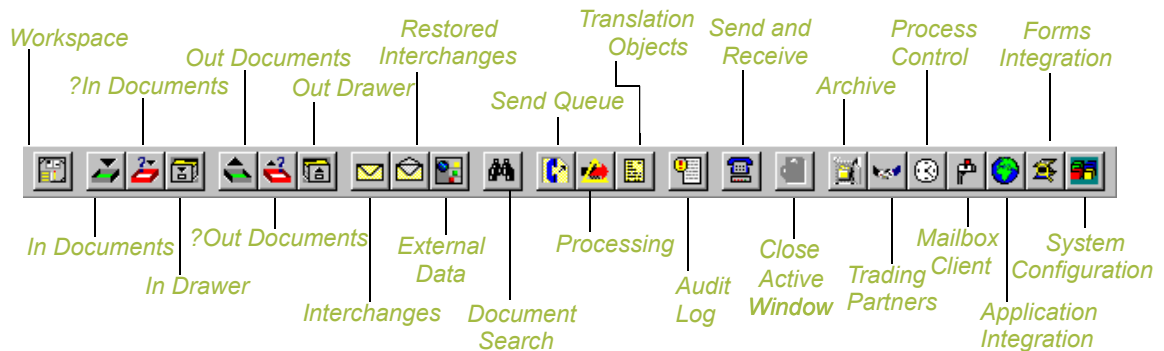
The *Minimize* button reduces the window to an icon. The *Maximize* button enlarges the window to its maximum size.

Main menu bar

The *Main Menu Bar* contains the drop-down menus. Detailed descriptions of each of the commands on these menus are found in the Online Help. Unavailable items are dimmed.

Main toolbar

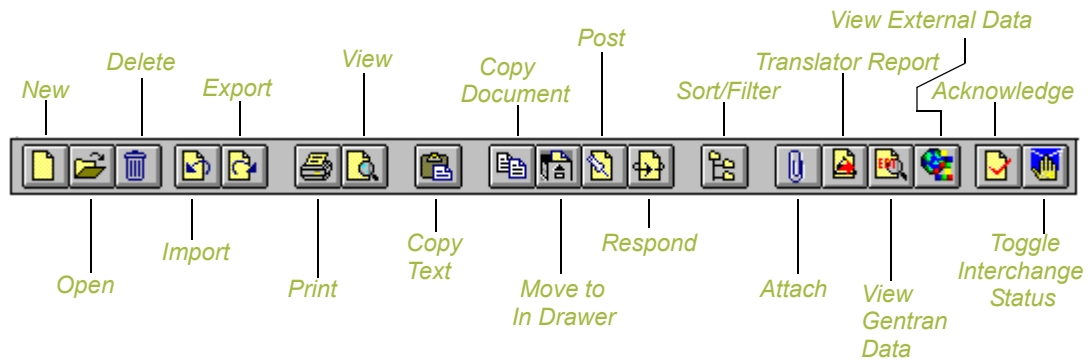
The *Main Toolbar* gives you access to some of the most common browsers and functions in Gentran:Server. Unavailable items are dimmed. The Main Toolbar is a dockable toolbar, so you can affix it to any edge of the EC Manager window. The following illustrates the Main Toolbar.



(Continued on next page)

Browser toolbar

The *Browser Toolbar* gives you access to the functions that are available from browsers in Gentran:Server. Unavailable items are dimmed. The Browser Toolbar is a dockable toolbar, so you can affix it to any edge of the EC Manager window. The following illustrates the Browser Toolbar:



The Desk

The Desk is a graphic representation of the Gentran:Server components and document locations. It provides a quick and easy way to access some of the most commonly used browsers, functions, and subsystems of Gentran:Server. You can 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 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), and allows you to quit Gentran:Server (Exit/door icon).

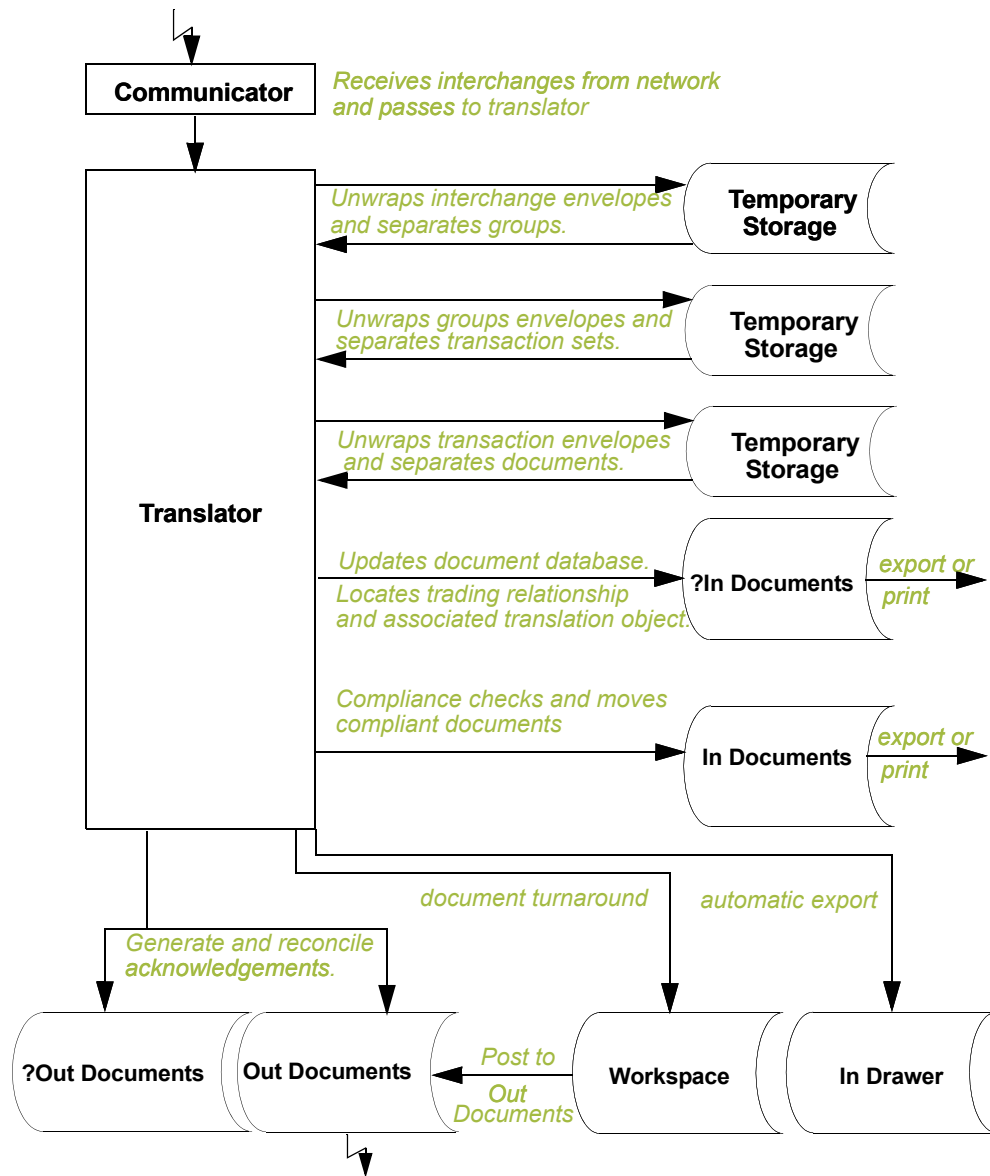
Status bar

The *Status Bar* displays status information about a selection, command, or process, defines menu items as you highlight each item in the menu, and indicates any current keyboard-initiated modes for typing (e.g., CAP for the “Caps Lock” key, NUM for the “Num Lock” key).

Gentran:Server Data Translation Process

Translating inbound data diagram

The following illustrates the inbound translation process:



Translating inbound data process

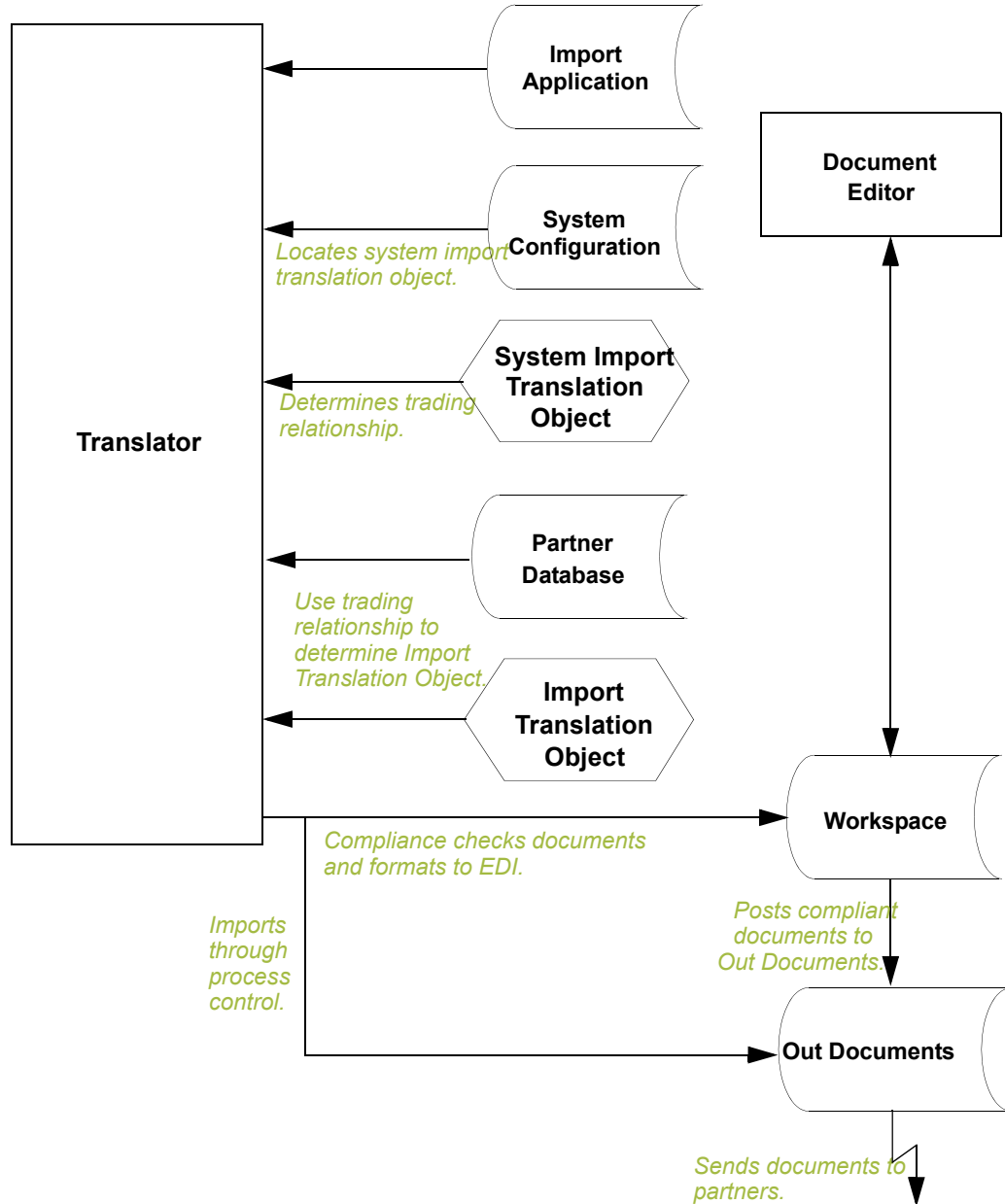
The system uses the following process to translate inbound data:.

Stage	Description
1	The Communicator receives interchanges from your trading partners via a network.
2	The Communicator passes the interchanges to the translator.
3	The translator uses a system interchange break translation object to unwrap the interchange envelopes and separate each group into temporary storage.
4	The translator uses a system group break translation object to unwrap the group envelopes and separate each transaction set into temporary storage.
5	The translator uses a system transaction break translation object to: <ul style="list-style-type: none"> • Unwrap the transaction envelopes. • Separate each document into a separate file on the system data store. • Write a record to the database with reference information about the document.
6	Does the translator locate a trading relationship for each document? <ul style="list-style-type: none"> • If <i>yes</i> (a trading relationship is located), the translator attempts to identify the export, document turnaround, or print translation object associated with that relationship. If the translator does locate a trading relationship and translation object, it uses that translation object to compliance check the document. • If <i>no</i> (the translator does not locate the trading relationship or translation object), the document is marked as not compliant and is moved in the ?In Documents.
7	Is the document is compliant with the EDI standard? <ul style="list-style-type: none"> • If <i>yes</i>, the translator changes the document status to compliant and moves the document in the In Documents. • If <i>no</i>, the document remains in the ?In Documents. The translator writes a detailed error report to help you to determine the problem that was encountered. <p style="text-align: right;">(Continued on next page)</p>

Stage	Description
8	<p>In the trading relationship, if you specify that the system needs to generate a functional acknowledgement for a document, the translator uses the system acknowledgement translation object to generate the acknowledgement.</p> <ul style="list-style-type: none">• Compliant acknowledgements are moved to the Out Documents to be sent.• Non-compliant acknowledgements are moved to the ?Out Documents. If an error occurred with the acknowledgement translation object, the acknowledgement is also moved to the ?Out Documents. <p>The translator also reconciles acknowledgements if you receive an acknowledgement-type transaction (such as 997 or CONTRL).</p>
9	<p>If you specified either automatic export or automatic turnaround in the trading relationship, the translator uses the specified export or document turnaround translation object to either export or generate the appropriate response document.</p>

**Translating
outbound data
diagram**

The following illustrates the outbound translation process:



Translating outbound data process

The system uses the following process to translate outbound data:

Stage	Description
1	<p>Use one of the following processes to initiate outbound translation:</p> <ul style="list-style-type: none"> • Import a file through the process control system using a timed or polled session. This writes all valid documents to the database with a compliant status and locates the documents in the Out Documents. Invalid documents are marked with a non-compliant status and located in the ?Out Documents. • Import an application file. Documents that you import manually are located in the Workspace. • Use the Document Editor to enter documents (if there is an appropriate data entry translation object registered with Gentran:Server). These documents are located in the Workspace.
2	If you import a file, the translator checks the import definitions from the system configuration to match the file name with a system import translation object.
3	The translator uses the system import translation object to determine which trading relationship (established in Partner Editor) corresponds to each document in the application file, so the system knows which import map to use to process the document.
4	After the translator determines which trading relationship corresponds with a document in the file, it ascertains which import translation object is specified in that relationship.
5	The translator uses the import translation object to compliance check the document. If the document is compliant (valid), it is marked "OK." If the document is not compliant (invalid), it is marked "NotOK."
6	If there is another document remaining in the import file, the translator repeats steps 3 - 5 until all documents are processed.
7	<p>If you manually import a file through the EC Manager or use the Document Editor, you need to post the compliant document to the Out Documents.</p> <p>Note Once documents are located in the Out Documents, they can be sent using the process control system or by using the EC Manager transmit option.</p>

Changing your Password

Introduction Your Gentran:Server password is stored in your User Access profile.

Notes

- You must know your old password to change it. If you have forgotten your password, please contact your system administrator.
- If you are using Integrated security, you may also need to change your Gentran:Server and database passwords if you change your Windows password.

Reference

See your system administrator if you have any questions about which security mode you use.

Procedure Use this procedure to change your password.

Step	Action
1	From the Options menu, select Preferences . System response The Preferences dialog box is displayed.
2	Select the Change Password tab to access that option.
3	In the Old Password box, type your old password.
4	In the New Password box, type your new password.
5	In the Confirm New Password box, type your new password again. Note If the Confirm New Password does not match the New Password, you will be prompted to type it again.
6	Once complete, click OK to save the changes. System response The system is updated and the next time you log on to the system you will need to enter the new password.

Using Translation Objects

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Overview

In this chapter This chapter describes how to use translation objects with Gentran:Server.

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:Server to control the processing of the translator subsystem.

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:Server.

Reference

See the *Application Integration User's Guide* and *Forms Integration User's Guide* more information about those subsystems.

Types of translation objects There are two types of 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 acknowledgements.

User translation objects

User translation objects control screen entry, importing, exporting, and creating printed reports. All required system translation objects are automatically installed with the Gentran:Server system.

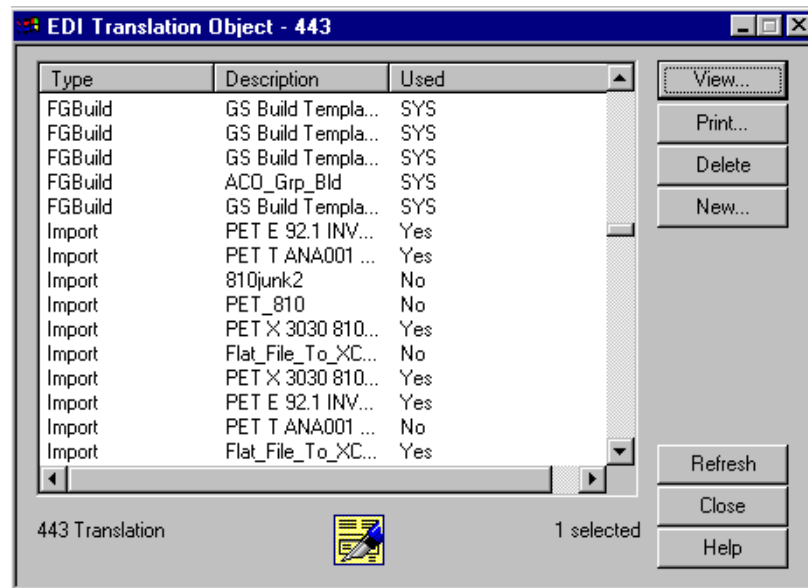
EDI Translation Object Browser

Introduction The following lists the system components that comprise the EDI Translation Object feature.

Browser or Dialog box	Function
EDI Translation Object	Allows you to view, print, delete, or register translation objects.
Register Translation Object	Allows you to select translation objects to be registered with the system.

EDI Translation Object browser diagram

The following illustrates the EDI Translation Object browser.



Parts and functions

The following lists the parts of the EDI Translation Object browser and their functions.

Part	Function
Type	Describes the type of translation object defined, such as export, import, or system import.
Description	Displays a description that further identifies the translation object.

(Continued on next page)

Part	Function
Used	<p>Indicates whether the translation object is currently associated with an Inbound or Outbound Partner Relationship. Valid values are:</p> <ul style="list-style-type: none"> • Yes—Indicates the translation object is in use. • No—Indicates the translation object is not in use. • SYS*—Indicates a system translation object that is in use. • SYS—Indicates a system translation object that is not in use <p>Note If a translation object is currently used (associated with an Inbound or Outbound Partner Relationship), you cannot delete it. Also, the system prevents you from deleting translation objects that are designated as system translation objects (SYS* or SYS). System Translation Objects are all translation objects except Import, Export, Data Entry, Screen Entry, Turn Around, and Print. Also, any translation object with “system” in the description is a system translation object.</p>
View	<p>Displays a window containing descriptive information for the selected translation object, including the following:</p> <ul style="list-style-type: none"> • Description of the translation object • Type of translation object (for example, Export) • Input and output agency (for example, X for ANSI X12) • Input and output version (for example, 003030) • Input and output transaction ID (for example, 850) • Input and output release (for TRADACOMS only) • File name of the translation object (for example, 3030.tpl)
Print	<p>Displays the Print Choice dialog box, which allows you to specify whether you want to print the selected translation objects or print a summary list of the selected translation objects.</p> <p>Note The Formatted option is unavailable because a formatted version is always printed when for a translation object. Use this table to determine your next step.</p>
Delete	Removes the selected translation object or objects.
New	Displays the Register Translation Object Dialog Box, which allows you to identify a translation object to the system.
Refresh	Refreshes the browser display.

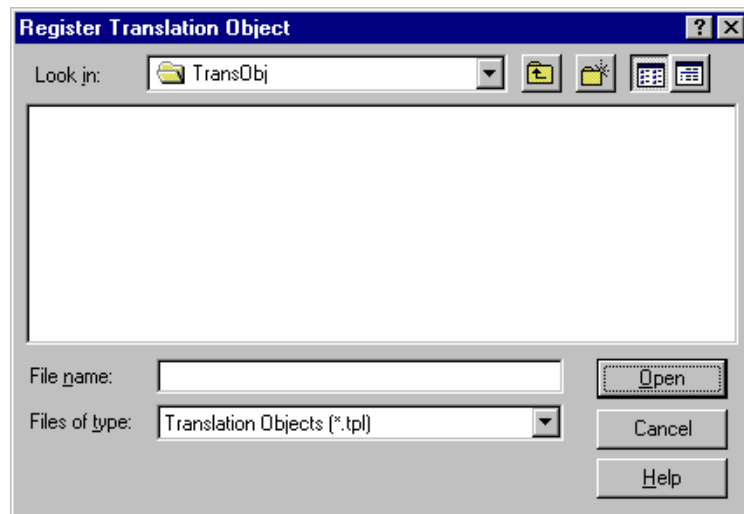
(Continued on next page)

Part	Function
Close	Exits the EDI Translation Object browser.
Help	Accesses Online Help.

Register Translation Object Dialog Box

Introduction The Register Translation Object dialog box enables you to register a selected translation object file with Gentran:Server (identify the translation object to the system).

Diagram The following illustrates the Register Translation Object dialog box:



Parts and functions The following lists the parts of the Register Translation Object dialog box and their functions:

Part	Function
Look in	Specify the drive and folder where the file is located.
File name	Specify the name of the file that you want to register.
Files of type	Specify the type of file that you want to access. Note The file extension for translation objects is .TPL.
Open	Selects the chosen file and exits the Open dialog box.
Cancel	Exits the Open dialog box without selecting a file.
Help	Accesses Online Help.

Registering New Translation Objects

Introduction The Register Translation Object function enables you to register your translation object file with Gentran:Server so the system can identify the translation object.

Automatic registration You can set the auto-register feature to automatically register translation objects when they are compiled. See How to Set the Auto-register option in chapter 2 of the *Application Integration User's Guide*.

Procedure Use this procedure to register a translation object.

Step	Action
1	<p>From the View menu, select Translation Objects.</p> <p>System response The system displays the EDI Translation Object browser.</p>
2	<p>Click New.</p> <p>System response The system displays the Register Translation Object dialog box.</p>
3	<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>Note To highlight a group of translation objects, click on the first translation object and then press the SHIFT 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 the CTRL key and click on the translation objects.</p>
4	<p>Click Open.</p> <p>System response The system registers the translation object files exits the Register Translation Object dialog box.</p> <p>Note If the selected file is invalid, you receive a warning message. Only valid Gentran:Server translation object files can be installed.</p> <p>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.</p>

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 (“No” in the Used column on the EDI Translation Object browser).

The system prevents you from deleting translation objects that are designated as “system translation objects” (SYS” or SYS).

Procedure Use this procedure to delete a translation object.

Step	Action
1	From the View menu, select Translation Objects . System response The EDI Translation Object browser is displayed.
2	Select the translation object or objects you want to delete.
3	Click Delete . System response The Delete confirmation dialog box is displayed.
4	Do you want to delete these translation objects? <ul style="list-style-type: none"> ▶ If <i>yes</i>, click Yes to confirm the delete. ▶ If <i>no</i>, click No to cancel the delete request.

Using Partners

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Introduction

In this chapter This chapter explains how to use the Gentran:Server Partner Editor, including:

- Using partner profiles
- Routing partner profiles
- Using partner tables
- Using partner locations

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

Gentran:Server for RosettaNet See “Using Partner Editor with Gentran:Server for RosettaNet” in the *Gentran:Server for RosettaNet User’s Guide* for more information about defining partners for use with RosettaNet®.

Using Partner Profiles

Overview

Introduction

You can set up your partner profiles using any of three methods: importing, copying, and creating them yourself. The method you use depends on whether you have a partner profile to use as a starting point, as shown in the following table:

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:Server system.</p> <p>Reference See <i>Importing Partner Profiles</i> on page 3 - 85 for more information.</p>
Copy existing profile	<p>Use this method when you have an existing profile that you can copy and then enter a unique partner definition and key enveloping information for the copied partner.</p> <p>Reference See <i>Copying Partner Profiles</i> on page 3 - 88 for more information.</p>
Create a new profile	<p>Use this method when you do not have a profile to import or copy.</p> <p>Reference See <i>Process of defining a partner profile</i> on page 3 - 5 for more information.</p>

Partner definition

A partner profile begins with a *partner definition*. The partner definition contains the basic information about that partner that the system needs before you define the rest of the partner profile. 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 appropriate *inbound relationship*.
- ▶ If you are sending information to this trading partner, you need to define an *outbound relationship*.

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

Process of defining a partner profile

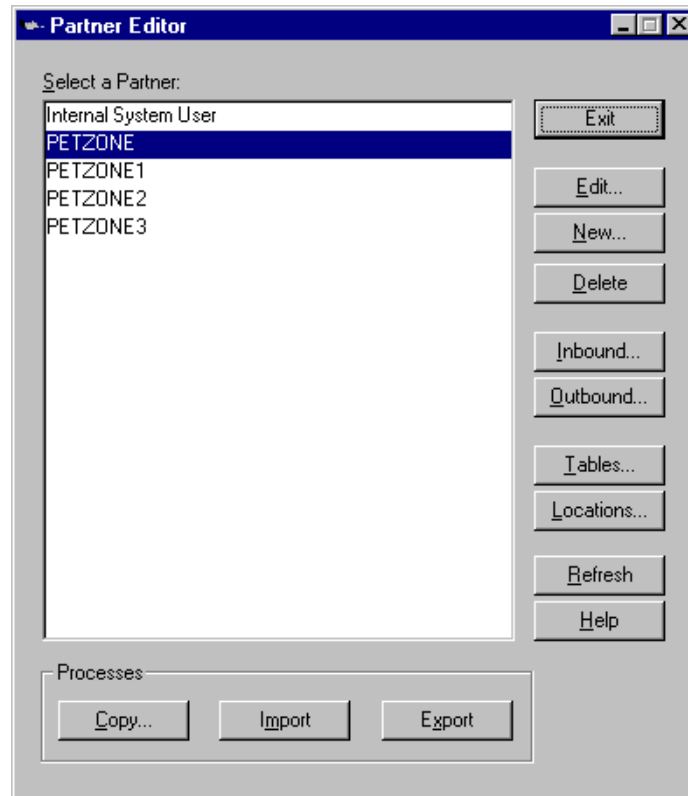
The following describes the partner profile creation process:

Stage	Description
1	Create the partner definition. Reference See <i>Creating a Partner Definition</i> on page 3 - 56.
2	If necessary, create the inbound relationship. Reference See <i>Creating an Inbound Relationship</i> on page 3 - 58.
3	If necessary, create the outbound relationship. Reference See <i>Creating an Outbound Relationship</i> on page 3 - 66.
4	Do you need to use a cross-reference or lookup table with the partner relationship to supplement or convert data you enter or receive? <ul style="list-style-type: none"> ▶ If <i>yes</i>, see <i>Creating Partner Tables</i> on page 3 - 102. ▶ If <i>no</i>, continue with stage 5.
5	Do you need to use locations to contain address- and contact-related information about the partner? <ul style="list-style-type: none"> ▶ If <i>yes</i>, see <i>Creating Partner Locations</i> on page 3 - 116. ▶ If <i>no</i>, you have completed the partner profile definition process.

Partner Editor Dialog Box

Introduction The Partner Editor enables you to define, edit, and delete all partner information for your company and all of your trading partners.

Diagram The following illustrates the Partner Editor dialog box:



Parts and functions The following lists the parts of the Partner Editor dialog box and their functions:

Part	Function
Select a Partner	Displays the list of partner profiles to select from.
Copy	Displays the Partner Copy Dialog Box, which allows you to copy a partner profile.
Import	Displays the Import File Select Dialog Box, which allows you to import a partner profile.

(Continued on next page)

Part	Function
Export	Displays the Export File Build Dialog Box, which allows you to export a partner profile.
Exit	Exits the Partner Editor dialog box.
Edit	Displays the Partner Definition (New/Edit) Dialog Box, which allows you to change information about the selected partner.
New	Displays the Partner Definition (New/Edit) Dialog Box, which allows you to create a partner definition.
Delete	Removes the selected partner profile from the system.
Inbound	Displays the Inbound Relationship Dialog Box for the selected partner.
Outbound	Displays the Outbound Relationship Dialog Box for the selected partner.
Tables	Displays the Partner Tables Dialog Box for the selected partner.
Locations	Displays the Location Select Dialog Box for the selected partner.
Refresh	Refreshes the dialog box display.
Help	Accesses Online Help.

Partner Definition (New/Edit) Dialog Box

Introduction The Partner Definition dialog box enables you to create a new partner definition or, if you select a previously defined partner definition, it allows you to edit it.

Diagram The following illustrates the Partner Definition - New dialog box:

Parts and functions The following lists the parts of the Partner Definition dialog box and their functions:

Part	Function
Profile ID	Specify a unique identifier for the selected partner.
Name	Specify a unique name for the partner. Note Make this name as descriptive as possible, because this is the name displayed in the partner selection list.
EDI Code	Specify the EDI identifier for this partner. The system uses this value during inbound processing to select the correct trading partner definition.
Application Code	Specify an application code used to identify this partner. The system uses this value during outbound import processing to select the correct trading partner definition. (Continued on next page)

Part	Function
Default Mailbox	<p>Select a default mailbox to use to identify this partner for non-RosettaNet EDI relationships.</p> <p>Reference See the <i>Communications User's Guide</i> for more information.</p>
Default E-mail Address	<p>Specify a default e-mail address to use to identify this partner for non-RosettaNet EDI relationships.</p> <p>Reference See the <i>Communications User's Guide</i> for more information.</p>
Save	Saves the modified information.
Exit	Exits the Partner Definition dialog box.
Help	Displays Online Help.
New Mailbox	<p>Displays the Create New Mailbox wizard, which allows you to create a new mailbox.</p> <p>Reference See the <i>Communications User's Guide</i> for more information.</p>
Edit Mailbox	<p>Displays the Mailbox Properties dialog box, which allows you to edit the mailbox.</p> <p>Reference See the <i>Communications User's Guide</i> for more information.</p>

Inbound Relationship Dialog Box

Introduction

Inbound relationships define the parameters the system needs to receive an EDI document from a trading partner. The Inbound Relationship dialog box controls other subordinate dialogs that allow you to define everything that is necessary to establish the relationship.

You are required to specify exactly which document is to be received. You also define which translation objects are used to define the turnaround documents, export rules, or printing requirements.

Diagram

The following illustrates the Inbound Relationship dialog box with the Advanced options displayed:

The screenshot shows the 'Inbound Relationship - PETZONE' dialog box. The 'Advanced' options are displayed, indicated by a double arrow icon on the 'Advanced' button. The dialog is divided into several sections:

- Relationship Description:** Includes dropdowns for 'Relationship Description' (Inbound Purchase Order ANSI 3030), 'Standard' (XX12), 'Version' (003030), 'Transaction Set' (850), and 'Release' (0).
- Buttons:** A vertical column of buttons on the right includes 'Save', 'Exit', 'New...', 'Delete', 'Translation...', '<< Advanced', and 'Help'.
- Transaction Type:** A checkbox labeled 'Transaction is an Acknowledgement' is currently unchecked.
- Groups and Interchanges:** Two text boxes show 'Inbound X3030 PO Grp' for Groups and 'Inbound X3030 PO Int' for Interchanges.
- Sequence Checking:** Radio buttons for 'None' (selected), 'Duplicate', 'Incremental', and 'Chronological'. A 'Last Used Control Number' field contains '0000'. Checkboxes for 'Duplicate Documents' and 'Skip Compliance Check' are present.
- Generate Acknowledgments:** Radio buttons for 'No' (selected), 'Yes - No Error Detail', and 'Yes - With Error Detail'.
- Acknowledgement Processing:** Radio buttons for 'Deferred' and 'Immediate' (selected).
- Test Indicator:** Radio buttons for 'Test' and 'Production' (selected).

Parts and functions

The following lists the parts of the Inbound Relationship dialog box and their functions:

Part	Function
Relationship Description	Select the existing inbound relationship.
Standard	<p>Specifies the EDI standard to be used in this relationship.</p> <p>Note Only standards for which you have existing translation objects are displayed. This box cannot be changed for an existing relationship. Selection of this box is mandatory.</p> <p>Valid values</p> <ul style="list-style-type: none"> • A - TRADACOMS • C - CII • D - NCPDP • E - EDIFACT • O - ODETTE • P - OTHER • R - ROSETTANET • T - TDCC • U - UCS • V - VDA • X - X12
Version	<p>Select the EDI standard version to be used in this relationship.</p> <p>Note Only versions of the selected standard for which you have existing translation objects are displayed. If this box is changed for an existing relationship, all of the information defined below it is cleared and must be reselected. Selection of this box is mandatory.</p>
Transaction Set	<p>Select the transaction set to be used in this relationship.</p> <p>Note Only transaction sets for the selected version for which you have existing translation objects are displayed. If this box is changed for an existing relationship, all of the information defined below it is cleared and must be reselected. Selection of this box is mandatory.</p> <p style="text-align: right;">(Continued on next page)</p>



Part	Function
Release	<p>Select the release number to be used in this relationship.</p> <p>Note Only releases for the selected transaction set for which you have existing translation objects are displayed. This box is currently only used for messages defined in the TRADACOMS standard. Selection of this box is mandatory for all TRADACOMS messages.</p>
Transaction is an Acknowledgement	Specify if the transaction defined in this partner relationship is an acknowledgement.
Groups	Accesses the Inbound Group Select Dialog Box.
Interchanges	Accesses the Inbound Interchange Select Dialog Box.
Sequence Checking	<p>Specify if the system will use sequence checking and whether sequence checking will be incremental or chronological. You can also indicate that the system must check for duplicate control numbers.</p> <ul style="list-style-type: none"> • None Do not use sequence checking. • Duplicate Check for duplicate control numbers. • Incremental The control number must be one greater than the last number. • Chronological The control number must be greater than the last number. <p>Note If the system detects duplicate control numbers or detects incremental or chronological control numbers that are out of sequence, those documents will be put in the ?In Documents.</p>
Last Used Control Number	<p>Specify a value that is used to sequence check the next transaction set control number or message reference. This value is replaced with the sequence number of the last transaction set or message received. This box is initially set to zero.</p> <p>Note This box is disabled if Sequence Checking is None.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Duplicate Documents	<p>Specify if the system will check for duplicate document names.</p> <p>Notes</p> <ul style="list-style-type: none"> • If the system detects duplicate document name it will locate those documents in ?In Documents. • If duplicate document checking is activated for a relationship the translation object used in this relationship must update the document name via a standard or extended rule. <p>Reference</p> <p>See the <i>Application Integration User's Guide</i> for more information about using standard and extended rules.</p>
Skip Compliance Check	<p>Specify if you want the system to compliance check the documents for this relationship.</p>
Generate Acknowledgements	<p>Instructs the system to generate a functional acknowledgement to this trading partner when you receive the transaction set (message) defined in this relationship. The default value for this box is No. Valid values:</p> <ul style="list-style-type: none"> • No Do <i>not</i> generate acknowledgements. • Yes - No Error Detail Generate acknowledgements without error detail. • Yes - With Error Detail Generate acknowledgements with error detail. <p>Note</p> <p>This entire box is inactive (dimmed) if the document (transaction set) in this relationship is an acknowledgement.</p>
Test Indicator	<p>Specify if this relationship definition is in test or production mode. The default value is Production.</p>
Acknowledgement Processing	<p>Specify if acknowledgement reconciliation will occur during the inbound break session (Immediate) or during its scheduled interval (Deferred). The default is Immediate.</p>
Save	<p>Saves the modified information.</p>
Exit	<p>Exits the Inbound Relationship dialog box.</p> <p style="text-align: right;">(Continued on next page)</p>



Part	Function
New	Accesses the New Inbound Relationship dialog box, which allows you to create a new relationship.
Delete	Removes the specified inbound relationship from the system.
Translation	Accesses the Inbound Translation Object Dialog Box.
Advanced	Toggles the display of the advanced options.
Help	Displays Online Help.

Inbound Translation Object Dialog Box

Introduction The Inbound Translation Objects dialog box is used to specify which translation objects will be used to process the data defined by this relationship.

The following lists the inbound translation levels (from the lowest level up):

Translation Level	Description
Document	Validate the document against the specified translation object to verify if the document is compliant with the standard and translate from EDI to print or application format.
Transaction	Remove the EDI-specific enveloping around a single document.
Group	Remove the EDI-specific enveloping around a set of related transactions (the transactions do not have to be the same type).
Interchange	Remove the EDI-specific enveloping around groups destined for the same trading partner.

Diagram The following illustrates the Inbound Translation Object dialog box with the Advanced options displayed:

The screenshot shows the 'Inbound Translation Objects - PETZONE' dialog box. The title bar is blue with a close button (X) in the top right corner. The dialog is divided into several sections:

- Select Translation Objects:** Contains three dropdown menus: 'Turn Around', 'Export File' (set to 'PET X 3030 850 Export'), and 'Print'. To the right of each dropdown is a checkbox labeled 'Auto'.
- Buttons:** On the right side, there are four buttons: 'Save', 'Exit', '<< Advanced' (highlighted with a dashed border), and 'Help'.
- Export File Name:** A text input field.
- Delete Empty Export Files?:** A checkbox.
- Export to Mailbox:** Contains a checked checkbox 'Export to Mailbox' and an unchecked checkbox 'Use Partner Default Mailbox and E-mail Address'. Below these are two text input fields: 'Recipient Mailbox' and 'Recipient E-mail Address'. To the right of the 'Recipient Mailbox' field is a 'New Mailbox' button, and to the right of the 'Recipient E-mail Address' field is an 'Edit Mailbox' button. Below these fields is a 'Content Type/SubType' text input field.
- Application ID:** A text input field.
- Application Alias Value:** A text input field containing the value '850'.
- Additional Translation Objects:** Contains four dropdown menus: 'Import', 'Data Entry', 'Transaction' (set to 'ST Break Template'), and 'Acknowledge'.

Parts and functions

The following lists the parts of the Inbound Translation Object dialog box and their functions:

Part	Function
Turn Around/ Auto	<p>Displays all turnaround document options. When a document is received, the turnaround document created is the natural response document that contains as many elements from the received document as possible.</p> <p>Note Select the Auto check box if you want the defined turnaround process to be automatic. If the Auto box is not selected, the received document will remain in the In Documents until it is selected for processing.</p>
Export File/ Auto	<p>Displays all registered Export translation objects relative to the Standard, Version, Transaction Set and Release defined by this relationship. This allows you to specify that when an EDI document is received, it will be exported into an output file.</p> <p>Notes</p> <ul style="list-style-type: none"> ▶ Select the Auto check box if you want the export file created automatically upon receipt of the document. If the Auto box is not selected, the received document will remain in the In Documents until it is selected for processing. ▶ If the Export File Name is defined for this relationship, each document can be exported individually to a unique file. If you use formatting characters in the file name, the document key changes for each document that is exported, the Process ID stays the same (for all documents exported from the same interchange), and the unique ID changes. Therefore, using the “document key” and “unique ID” special characters (defined below), a unique file name can be derived. <p>Reference See <i>Export File Name</i> on page 3 - 18 for more information about these values.</p>
Print	<p>Displays all print translation objects on the system for the Standard, Version, Transaction Set, and Release defined by the relationship. The selected translation object will be used to print documents received from this partner.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Export File Name	<p>Specify the name of the file to be created or appended to as a result of performing an export operation. This file name can contain a mix of alphanumeric characters and formatting characters, which are replaced by the translator with the runtime value they represent.</p> <p>Formatting characters supported</p> <ul style="list-style-type: none"> %y (two-digit year) %Y (four-digit year) %m (abbreviated month name) %M (month as a decimal number) %d (abbreviated weekday name) %D (day of the month as a decimal number) %H (hour in 24-hour format) %N (minutes) %S (seconds) %K (document key) %P (process identifier) %U (unique number derived using the current time, export filename, process identifier, and the rand() function) <p>Note</p> <p>The runtime file name is generated once per export.</p> <p>Example</p> <p>The following is an example of a runtime file name using formatting characters:</p> <pre>d:\GENSRVNT\exports\dokey%Kprocid%Puniqueid%U.dat</pre>
Delete Empty Export Files?	<p>If the result of the export operation is an empty export file, the file will be deleted when this option is checked. If left unchecked, the empty file will not be deleted.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Export to Mailbox	<p>Invokes the "Export to Mailbox" function, which delivers the output of an inbound translation to the Mailbox Server Manager. This allows the Mailbox Server Manager to act as a message broker responsible for delivering the data to its final destination.</p> <p>Note If you specified the Export File Name, it is still valid and will become the Attachment Filename. Formatting characters are still valid for the filename and could cause multiple attachments to be created if document key is used. For example, if the following filename is used:</p> <p>d:\gensrvnt\exports\dokey%Kprocid%Puniqueid%U.dat</p> <p>a new attachment is created for each document because the document key creates a unique name for each document processed.</p> <p>To set up an export to a mailbox, you must complete the following components on the Inbound Translation Objects dialog box:</p> <ul style="list-style-type: none"> • In the Export File Name box, type the file name. • Select the Export to Mailbox checkbox. • From the Recipient Mailbox list, select the mailbox (the Recipient E-mail Address is optional). • In the Content Type/SubType box, type a content type (content subtype is optional).
Use Partner Default Mailbox and E-mail Address	Specify if the output of the inbound translation is exported to the default mailbox and e-mail address configured for this partner.
Recipient Mailbox/ New Mailbox	<p>Select the mailbox to which the output of an inbound translation is delivered.</p> <p>Or, click New Mailbox to display the Create New Mailbox wizard, which allows you to create a new mailbox.</p> <p>Reference See the <i>Communications User's Guide</i> for more information.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Recipient E-mail Address/ Edit Mailbox	Specify the e-mail address to which the output of an inbound translation is delivered. Or, click Edit Mailbox to display the Create New Mailbox wizard, which allows you to edit the mailbox. Reference See the <i>Communications User's Guide</i> for more information.
Content Type/ SubType	Specify the content type/sub type of the message containing the output of the inbound translation. Reference See the <i>Communications User's Guide</i> for more information.
Application ID	Specify the application identifier that indicates the destination of the documents.
Application Alias Value	Specify criteria for this relationship definition that is used during the application import function. Example The application contains data that can generate either an invoice or a credit memo. Use one relationship definition for invoices and another for credit memos. There is a box in the application that defines whether this is an invoice or a credit memo. The box will display CREDIT if a credit memo is created and INVOICE if an invoice is created. Type CREDIT in the Application Alias Value for the relationship defining the credit memo and type INVOICE for the invoice. Note This box is only used if you receive translation objects that are defined to use the Application Alias Value. (Continued on next page)

Part	Function
Import	<p>Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required.</p> <p>Note You must select a translation object from the Import list if you have created a specific import translation object for this relationship and if you want to change the way the system behaves for this partner relationship. Import translation objects may not be appropriate for an Inbound Relationship.</p>
Data Entry	<p>Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required.</p> <p>Note You must select a translation object from the Data Entry list if you have created a specific data entry translation object for this relationship and if you want to change the way the system behaves for this partner relationship (e.g., if you want to change the formatted view of Inbound data).</p>
Transaction	<p>Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required.</p> <p>Note You must select a translation object from the Transaction list if you have created a specific Transaction Break translation object for this relationship and if you want to change the way the system behaves for this partner relationship.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Acknowledge	<p>Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required.</p> <p>Note You must select a translation object from the Acknowledge list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner relationship.</p> <p>When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list.</p> <p>If the transaction set is an acknowledgement and you choose an Acknowledge additional translation object, the system will use the additional translation object in place of the export translation object for acknowledgement reconciliation.</p>
Save	Saves the modified information.
Exit	Exits the Inbound Translation Object dialog box.
Advanced	Toggles the display of the advanced options.
Help	Displays Online Help.

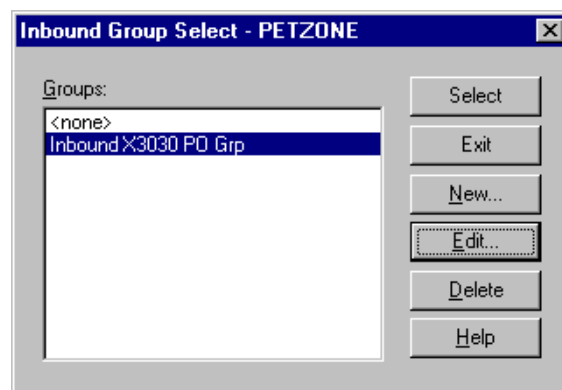
Inbound Group Select Dialog Box

Introduction The Inbound Group Select dialog box is used to select an existing functional group definition to be associated with this relationship. It can also be used to initiate the definition of a new functional group or to modify or delete an existing definition. The groups available to you are determined by the version you selected on the Inbound Relationship dialog.

Note

Functional groups are required for ANSI X12, TDCC, and UCS standards, optional for EDIFACT and ODETTE, and not specified for TRADACOMS.

Diagram The following illustrates the Inbound Group Select dialog box:



Parts and functions The following lists the parts of the Inbound Group Select dialog box and their functions:

Part	Function
Groups	Displays all functional group definitions established for this trading partner.
Select	Selects the indicated functional group to be used with this relationship. Note Select <none> if the standard you are using does not require groups and you do not want to use one.
Exit	Exits the Inbound Group Select dialog box.
New	Displays the Inbound Group Entry Dialog Box, which allows you to create a new group.

(Continued on next page)

Part	Function
Edit	Displays the Inbound Group Entry Dialog Box, which allows you to edit the selected group.
Delete	Removes the selected group from the system.
Help	Displays Online Help.

Inbound Group Entry Dialog Box

Introduction The Inbound Group Entry dialog box is used to specify a functional group definition.

Diagram The following illustrates the Inbound Group Entry dialog box with the Advanced options displayed:

Parts and functions The following lists the parts of the Inbound Group Entry dialog box and their functions:

Part	Function
Description	Specify the name of the functional group description.
Standard	Displays the EDI standard the system is using for this relationship definition.
Version	Displays the version of the EDI standard the system is using for this relationship.

(Continued on next page)

Part	Function
Functional Group ID	<p>Specify the functional group. These identification boxes are defined by each appropriate standards group to group like documents. The standard defines which functional group ID should be used with each document type. This is a mandatory box.</p> <p>Examples</p> <p>IN 810 X12 Invoice PO 850 X12 Purchase Order IG 830 UCS Invoice OG 875 UCS P. O. INVOIC EDIFACT INVOIC ORDERS EDIFACT ORDERS INVOIC Tradacoms INVOIC ORDERS Tradacoms ORDERS</p> <p>This element is located in:</p> <p>ANSI X12: GS01 EDIFACT: UNG01 TRADACOMS:BAT</p>
Sequence Checking	<p>Specify if inbound sequence checking will be used and whether the type of sequence checking will be incremental or chronological. You can also indicate that the system must check for duplicate control numbers.</p> <ul style="list-style-type: none"> • None Do not use sequence checking. • Duplicate Check for duplicate control numbers. • Incremental The control number must be one greater than the last number. • Chronological The control number must be greater than the last number. <p>Note</p> <p>If the system detects duplicate control numbers or detects incremental or chronological control numbers that are out of sequence, those documents will be put in the ?In Documents.</p>
Last Used Group Control Number	<p>Specifies a value that the system will use to sequence check the group control number. The number will be replaced by the group control number that the system receives. This box will initially be set to zero.</p> <p style="text-align: right;">(Continued on next page)</p>

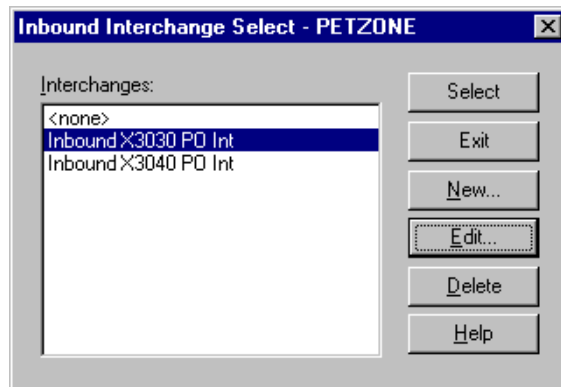
Part	Function
Acknowledge Group	<p>Instructs the system to send a functional acknowledgement to this trading partner when you receive the group defined in this relationship. The default value for this box is not checked (do not expect an acknowledgement).</p> <p>Note This check box is dimmed (inactive) if the transaction set is an acknowledgement.</p>
Ack Translation Set ID	<p>Select the acknowledgement you want generated for this group.</p> <p>Example ANSI X12 = 997 Functional Acknowledgement UCS/EDIA = 999 Acceptance/Rejection Advice EDIFACT = CNTRL</p>
Group Transl. Obj.	<p>Select a partner-specific Group Break Map translation object if this trading partner group deviates from the normal system behavior. You must select a translation object from this list if you want the system to perform partner-specific grouping.</p> <p>Warning We strongly recommend that you do not change the translation objects in the Group Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Acknowledge Transl. Obj.	<p>Select an Acknowledgement Break Map if one exists on the system.</p> <p>Note You must select a translation object from the Acknowledge Transl. Obj. list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner group. When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list.</p> <p>Warning We strongly recommend that you do not change the translation objects in the Group Transl. Obj. and Acknowledge Transl. lists, unless you have a specific reason for doing so.</p>
Save	Saves the modified information.
Exit	Exits the Inbound Group Entry dialog box.
Advanced	Toggles the display of the advanced options.
Help	Displays Online Help.

Inbound Interchange Select Dialog Box

Introduction The Inbound Interchanges Select dialog box is used to select an existing interchange definition to be associated with this relationship. You can also use it to initiate the definition of a new interchange or to modify or delete an existing definition. The interchanges available to you are determined by the version you selected on the Inbound Relationships dialog. Interchanges are required for EDIFACT, ODETTE, TRADACOMS, and UCS, and optional for ANSI X12 and TDCC.

Diagram The following illustrates the Inbound Interchange Select dialog box:



Parts and functions The following lists the parts of the Inbound Interchange Select dialog box and their functions:

Part	Function
Interchanges	Displays all Interchange definitions established for this trading partner.
Select	Selects the indicated interchange to be used with this relationship. Note Select <none> if the standard you are using does not require interchanges and you do not want to use one.
Exit	Exits the Inbound Interchange Select dialog box.
New	Displays the Inbound Interchange Entry Dialog Box, which allows you to create a new interchange.

(Continued on next page)

Part	Function
Edit	Displays the Inbound Interchange Entry Dialog Box, which allows you to edit the selected interchange.
Delete	Removes the selected interchange from the system.
Help	Displays Online Help.

Inbound Interchange Entry Dialog Box

Introduction The Inbound Interchange Entry dialog box is used to specify a new interchange definition.

Note

EDIFACT version 4 defines the infrastructure necessary to support the creation (and processing) of interchanges that have been encoded using a character set other than 8-bit ASCII. Gentran:Server for Windows supports the processing of an encoded interchange as long as the encoding of the interchange matches the default code page of the operating system where Gentran:Server is running.

Diagram The following illustrates the Inbound Interchange Entry dialog box with the Advanced options displayed:

The screenshot shows the 'Inbound Interchange Entry - PETZONE' dialog box. The 'Description' field contains 'Inbound X3030 PD Int'. The 'Standard' field is 'X12' and the 'Version' field is '003030'. The 'Interchange ID' dropdown is set to 'ISA'. Under 'Sequence Checking', the 'None' radio button is selected. The 'Last Used Control Number' field contains '00000000'. The 'Acknowledge Interchange' checkbox is unchecked. The 'Ack Transaction Set ID' dropdown is empty. The 'Interchange Transl. Obj.' and 'Acknowledge Transl. Obj.' dropdowns are also empty. On the right side, there are buttons for 'Save', 'Exit', '<< Advanced', and 'Help'.

Parts and functions

The following lists the parts of the Inbound Interchange Entry dialog box and their functions:

Part	Function
Description	Contains the name of the interchange description.
Standard	Displays the EDI standard the system is using for this relationship definition.
Version	Displays the version of the EDI standard the system is using for this relationship.
Interchange ID	<p>Select the type of interchange. The standard defines which interchange ID should be used with each standard. This is a mandatory box.</p> <p>Example ANSI X12 - ISA - ICS UCS - BG EDIFACT - UNB Tradacoms - STX</p>
Sequence Checking	<p>Specify if the system will use sequence checking and whether the sequence checking will be incremental or chronological. You can also indicate that the system must check for duplicate control numbers.</p> <ul style="list-style-type: none"> ▶ None Do not use sequence checking. ▶ Duplicate Check for duplicate control numbers. ▶ Incremental The control number must be one greater than the last number. ▶ Chronological The control number must be greater than the last number. <p>Note If the system detects duplicate control numbers or detects incremental or chronological control numbers that are out of sequence, those documents will be put in the ?In Documents.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Last Used Control Number	<p>Specifies a value that will be used to sequence check the next interchange control number. The number will be replaced by the control number on the last interchange received. This box will initially be set to zero.</p> <p>Note This box is disabled if Sequence Checking is None.</p>
Acknowledge Interchange	<p>Instructs the system to send a functional acknowledgement to this trading partner when you receive the interchange set defined in this relationship. The default value for this box is not checked (do not expect an acknowledgement).</p>
Ack Translation Set ID	<p>Select the acknowledgement you want generated for this interchange.</p> <p>Example ANSI X12 = 997 Functional Acknowledgement UCS/EDIA = 999 Acceptance/Rejection Advice EDIFACT = CNTRL</p>
Interchange Transl. Obj.	<p>Select a partner-specific Interchange Break Map translation object if this trading partner interchange deviates from the normal system behavior. You must select a translation object from this list if you want the system to perform partner-specific interchanging.</p> <p>Warning We strongly recommend that you do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Acknowledge Transl. Obj.	<p>Select an Acknowledgement Break Map if one exists on the system.</p> <p>You must select a translation object from the Acknowledge Transl. Obj. list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner interchange. When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list.</p> <p>Warning We strongly recommend that you do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.</p>
Save	Saves the modified information.
Exit	Exits the Inbound Interchange Entry dialog box.
Advanced	Toggles the display of the advanced options.
Help	Displays Online Help.

Outbound Relationship Dialog Box

Introduction Outbound relationships define the parameters needed to send an EDI document to a trading partner. The Outbound Relationship dialog box controls other subordinate dialogs that allow you to define everything that is necessary to establish the relationship.

You are required to specify exactly which document the system sends. You must also specify which translation objects will be used to define the data entry dialogs, import rules, or printing requirements. In addition, you need to define the specific EDI-enveloping requirements that you agreed on with your trading partner.

Diagram The following illustrates the Outbound Relationship dialog box with the Advanced options displayed:

The screenshot shows the 'Outbound Relationship - PETZONE' dialog box. The 'Relationship Description' is 'Outbound Acknowledgment ANSI 3030'. The 'Standard' is 'XX12', 'Version' is '003030', and 'Transaction Set' is '997'. The 'Release' dropdown is set to '1'. On the right side, there are buttons for 'Save', 'Exit', 'New...', 'Delete', 'Translation...', 'Envelope...', '<< Advanced', and 'Help'. Below these, there are 'Groups' and 'Interchanges' sections. The 'Groups' section shows 'Outbnd X3030 FA Grp' and the 'Interchanges' section shows 'Outbnd X3030 FA Int'. At the bottom, there is a 'Last Used Control Number' field with '0000'. There are two checkboxes: 'Expect Acknowledgement' (unchecked) and 'Duplicate Documents' (unchecked). The 'Hours Overdue' field is '0'. The 'Test Indicator' has two radio buttons: 'Test' (unchecked) and 'Production' (checked).

Parts and functions

The following lists the parts of the Outbound Relationship dialog box and their functions:

Part	Function
Relationship Description	Select the relationship description.
Standard	<p>Specifies the EDI standard to be used in this relationship.</p> <p>Note Only standards for which you have existing translation objects are displayed. This box cannot be changed for an existing relationship. Selection of this box is mandatory.</p> <p>Valid values</p> <ul style="list-style-type: none"> • A-TRADACOMS • C-CII • D-NCPDP • E-EDIFACT • O-ODETTE • P-OTHER • R-ROSETTANET • T-TDCC • U-UCS • V-VDA • X-X12
Version	<p>Select the EDI standard version to be used in this relationship.</p> <p>Note Only versions of the selected standard for which you have existing translation objects are displayed. If this box is changed for an existing relationship, all of the information defined below it is cleared and must be reselected. Selection of this box is mandatory.</p>
Transaction Set	<p>Select the transaction set to be used in this relationship.</p> <p>Note Only transaction sets for the selected version for which you have existing translation objects are displayed. If this box is changed for an existing relationship, all of the information defined below it is cleared and must be reselected. Selection of this box is mandatory.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Release	<p>Select the release number to be used in this relationship.</p> <p>Note Only releases for the selected transaction set for which you have existing translation objects will be displayed. This box is currently only used for messages defined in the TRADACOMS standard. Selection of this box is mandatory for all TRADACOMS messages.</p>
Groups	Accesses the Outbound Group Select Dialog Box.
Interchanges	Accesses the Outbound Interchange Select Dialog Box.
Last Used Control Number	<p>Specify a value that will be used to generate the next transaction set control number or message reference. The number generated will always be one more than the number in this box. Initially, this box will be set to zero.</p>
Expect Acknowledgement	<p>Instructs the system to expect a functional acknowledgement to be received from this trading partner as a result of your partner receiving the transaction set (message) defined in this relationship. The default value for this box is not checked (do not expect an acknowledgement).</p>
Hours Overdue	<p>Defines how many hours must elapse before an expected functional acknowledgement is considered overdue. This box is only valid if the Expect Acknowledgement box is checked. The default value for this box is “48,” indicating that the acknowledgement will be considered overdue in two days. If you enter a value of zero in this box, the acknowledgement will be immediately considered overdue.</p> <p>Note This box is disabled if Expect Acknowledgement is <i>not</i> checked.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Duplicate Documents	<p>Instructs the system to check for duplicate document names.</p> <p>Notes</p> <ul style="list-style-type: none"> • If you manually import documents into the Workspace, this function checks for duplicate documents. Duplicate documents remain in the Workspace until they are deleted. If you try to move or post a duplicate document, a warning message is displayed. If you use the Process Control import feature to import documents, the duplicate document is located in ?Out Documents. • If duplicate document checking is activated for a relationship, the translation object used in this relationship must update the document name via a standard or extended rule. <p>Reference</p> <p>See the <i>Application Integration User's Guide</i> for more information about using standard and extended rules.</p>
Test Indicator	Specify if this relationship definition is in test or production mode. The default value is production.
Save	Saves the modified information.
Exit	Exits the Outbound Relationship dialog box.
New	Accesses the New Outbound Relationship dialog box, which allows you to create a new relationship.
Delete	Removes the specified outbound relationship from the system.
Translation	Accesses the Outbound Translation Object Dialog Box.
Envelope	<p>Accesses one of the following Outbound Envelope dialog boxes depending on which version you specified:</p> <ul style="list-style-type: none"> • Outbound UNH Envelope • Outbound MHD Envelope • Outbound ST Envelope <p>Reference</p> <p>Refer to the Partner Editor online help for specific information about the envelope dialog boxes.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Advanced	Toggles the display of the advanced options.
Help	Displays Online Help.

Outbound Translation Object Dialog Box

Introduction The Outbound Translation Objects dialog box is used to specify which translation objects are used to process the data defined by this relationship.

The following lists the outbound translation levels (from the lowest level up):

Translation Level	Description
Document	Translate from import format or data entry to EDI.
Transaction	Build the EDI-specific enveloping around a single document.
Group	Build the EDI-specific enveloping around a set of related transactions (the transactions do not have to be the same type).
Interchange	Build the EDI-specific enveloping around groups destined for the same trading partner.

Diagram The following illustrates the Outbound Translation Object dialog box with the Advanced options displayed:

Outbound Translation Objects - PETZONE

Select Translation Objects

Import: ACKBUILD_997

Print: []

Data Entry: []

Application ID: []

Application Alias Value: 997

Additional Translation Objects

TurnAround: []

Export: []

Transaction: ST Build Template - ANSI

Acknowledge: []

Buttons: Save, Exit, << Advanced, Help

Parts and functions

The following lists the parts of the Outbound Translation Object dialog box and their functions:

Part	Function
Import	Displays all import translation objects in the system for the Standard, Version, Transaction Set, and Release defined by the relationship.
Print	Displays all print translation objects in the system for the Standard, Version, Transaction Set, and Release defined by the relationship. The selected translation object will be used to print documents sent to this partner.
Data Entry	Displays all screen entry translation objects in the system for the Standard, Version, Transaction Set, and Release defined by the relationship.
Application ID	Specify the application identifier that indicates the destination of the documents.
Application Alias Value	<p>Specify the criteria for this relationship definition, which will be used during the application import function.</p> <p>Example The application contains data that can generate either an invoice or a credit memo. Use one relationship definition for invoices and another for credit memos.</p> <p>There is a box in the application that defines whether this is an invoice or a credit memo. The box will display CREDIT if a credit memo is created and INVOICE if an invoice is created. Type CREDIT in the Application Alias Value for the relationship defining the credit memo or INVOICE for the invoice.</p> <p>Note This box will only be used if you receive translation objects that are defined to use the Application Alias Value.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
TurnAround	<p>Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required.</p> <p>You must select a translation object from the TurnAround list if you have created a specific turnaround translation object for this relationship and if you want to change the way the system behaves for this partner relationship.</p> <p>Note TurnAround translation objects may not be appropriate for an Outbound Relationship.</p>
Export	<p>Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required.</p> <p>You must select a translation object from the Export list if you have created a specific export translation object for this relationship and if you want to change the way the system behaves for this partner relationship. Export translation objects are used to export an outbound document to a file.</p>
Transaction	<p>Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required.</p> <p>You must select a translation object from the Transaction list if you have created a specific Transaction Build translation object for this relationship and if you want to change the way the system behaves for this partner relationship.</p> <p style="text-align: right;">(Continued on next page)</p>

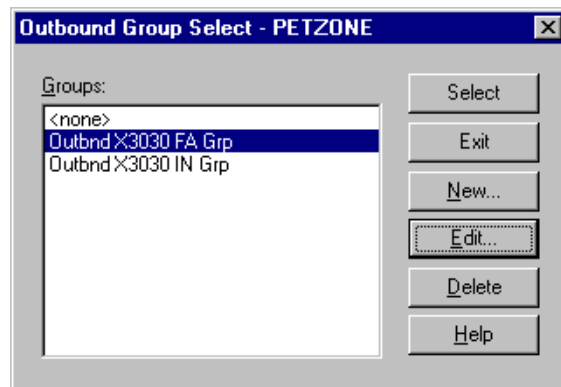
Part	Function
Acknowledge	<p>Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required.</p> <p>You must select a translation object from the Acknowledge list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner relationship. When the system generates an acknowledgement, it writes the acknowledgement to an internal file containing the acknowledgement details and then maps that internal file. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list.</p>
Save	Saves the modified information.
Exit	Exits the Outbound Translation Object dialog box.
Advanced	Toggles the display of the advanced options.
Help	Displays Online Help.

Outbound Group Select Dialog Box

Introduction The Outbound Group Select dialog box is used to select an existing functional group definition to be associated with this relationship. You can also use it to initiate the definition of a new functional group or to modify or delete an existing definition. The groups that are available to you are determined by the version you selected on the Outbound Relationship dialog box.

Functional groups are required for ANSI X12, TDCC, and UCS standards, are optional for EDIFACT and ODETTE, and are not specified for TRADACOMS.

Diagram The following illustrates the Outbound Group Select dialog box:



Parts and functions The following lists the parts of the Outbound Group Select dialog box and their functions:

Part	Function
Groups	Displays all functional group definitions established for this trading partner.
Select	Selects the indicated functional group as the one the system uses for this relationship.
Exit	Exits the Outbound Group Select dialog box.
New	Displays the Outbound Group Entry Dialog Box, which allows you to create a new group.
Edit	Displays the Outbound Group Entry Dialog Box, which allows you to edit the selected group.
Delete	Removes the selected group from the system.
Help	Displays Online Help.

Outbound Group Entry Dialog Box

Introduction The Outbound Group Entry dialog box is used to specify a new functional group definition.

Diagram The following illustrates the Outbound Group Entry dialog box with the Advanced options displayed:

Parts and functions The following lists the parts of the Outbound Group Entry dialog box and their functions:

Part	Function
Description	Specify the name of the functional group description.
Standard	Displays the EDI standard the system is using for this relationship definition.

(Continued on next page)

Part	Function
Version	Displays the version of the EDI standard the system is using for this relationship.
Functional Group ID	<p>Specifies the functional group. These identification boxes are defined by each appropriate standards group to group like documents. The standard defines which functional group ID should be used with each document type. This is a mandatory box.</p> <p>Examples</p> <p>IN 810 X12 Invoice PO 850 X12 Purchase Order IG 830 UCS Invoice OG 875 UCS P. O. INVOIC EDIFACT INVOIC ORDERS EDIFACT ORDERS INVOIC Tradacoms INVOIC ORDERS Tradacoms ORDERS</p> <p>This element is located in:</p> <p>ANSI X12: GS01 EDIFACT: UNG01 TRADACOMS:BAT</p>
Last Used Group Control Number	<p>Specify a value that is used to generate the next interchange control number. The number generated will always be one more than the number in this box. This box will initially be set to zero.</p> <p>Note</p> <p>To ensure that functional acknowledgements work correctly, you must define a unique control number for each group relationship that exists for the same partner relationship.</p>
Expect Acknowledgement	<p>Instruct the system to expect a functional acknowledgement to be received from this trading partner as a result of your partner receiving the group defined in this relationship. The default value for this box is not checked (do not expect an acknowledgement).</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Hours Overdue	<p>Specify how many hours must elapse before an expected functional acknowledgement is considered overdue. This box is only valid if the Expect Acknowledgement box is checked. The default value for this box is “48,” indicating that the acknowledgement will be considered overdue in two days. If you enter a value of “0” (zero) in this box, the acknowledgement will be immediately considered overdue.</p> <p>Note This box is disabled if Expect Acknowledgement is <i>not</i> checked.</p>
Sequence From Group	<p>Specify if the transaction set control number options for this group setup should be controlled at the group level. If this box is not checked, the following two fields are disabled.</p>
Last Used Control Number	<p>Specify a value that will be used to generate the next transaction set control number for the sets defined within this functional group. The number generated will always be one more than the number in this box. This box will initially be set to zero.</p> <p>Note This box is disabled if Sequence From Group is <i>not</i> checked.</p> <p style="text-align: right;">(Continued on next page)</p>

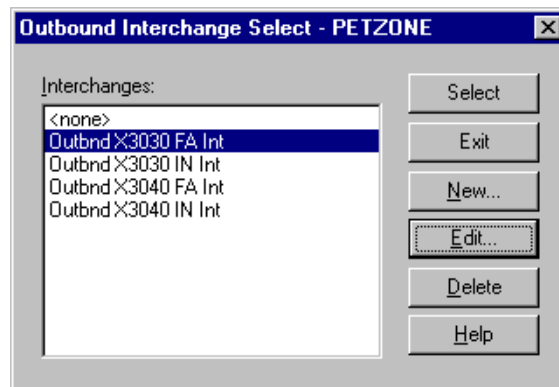
Part	Function
Format	<p>Select the format of the transaction set control number that will be generated:</p> <p>Normal The number will be generated by incrementing the last used control number. The length of the number will be defined by the standard.</p> <p>6/3 The number will be a composite of two numbers. 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. Use this format only as instructed by your trading partner.</p> <p>5/4 The number will be 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. This is the normal TDCC numbering convention. It is used by the Motor, Rail, and Ocean transportation industries.</p> <p>5/3 The number will be 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. This is the normal UCS convention, which is used by the Grocery and Warehousing industries.</p> <p>Note This box is disabled if Sequence From Group is <i>not</i> checked.</p>
Group Transl. Obj.	<p>Select a partner-specific Group Build Map translation object if this trading partner group deviates from the normal system behavior. You must select a translation object from this list if you want the system to perform partner-specific grouping.</p> <p>Warning We strongly recommend that you do not change the translation objects in the Group Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Acknowledge Transl. Obj.	<p>Select an Acknowledgement Build Map if one exists on the system.</p> <p>You must select a translation object from the Acknowledge Transl. Obj. list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner group. When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list.</p> <p>Warning We strongly recommend that you do not change the translation objects in the Group Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.</p>
Save	Saves the modified information.
Exit	Exits the Outbound Group Entry dialog box.
Envelope	<p>Accesses one of the following Outbound Functional Group Envelope dialog boxes depending on which version you specified on the Outbound Relationship Dialog Box:</p> <ul style="list-style-type: none"> ▶ Outbound GS Functional Group ▶ Outbound UNG Functional Group ▶ Outbound BAT Functional Group <p>Reference Refer to the Partner Editor online help for specific information about the envelope dialog boxes.</p>
Advanced	Toggles the display of the advanced options.
Help	Displays Online Help.

Outbound Interchange Select Dialog Box

Introduction The Outbound Interchange Select dialog box is used to select an existing interchange definition to be associated with this relationship. It can also be used to initiate the definition of a new interchange, or to modify or delete an existing definition. The interchanges available to you are determined by the version you selected on the Outbound Relationship dialog box. Interchanges are required for EDIFACT, ODETTE, TRADACOMS, and UCS, and are optional for ANSI X12 and TDCC.

Diagram The following illustrates the Outbound Interchange Select dialog box:



Parts and functions The following lists the parts of the Outbound Interchange Select dialog box and their functions:

Part	Function
Interchanges	Displays all interchange definitions established for this trading partner.
Select	Selects the indicated interchange to be used with this relationship. Note Select <none> if the standard you are using does not require interchanges and you do not want to use one.
Exit	Exits the Inbound Interchange Select dialog box.
New	Displays the Outbound Interchange Entry Dialog Box, which allows you to create a new interchange. (Continued on next page)

Part	Function
Edit	Displays the Outbound Interchange Entry Dialog Box, which allows you to edit the selected interchange.
Delete	Removes the selected interchange from the system.
Help	Displays Online Help.

Outbound Interchange Entry Dialog Box

Introduction The Outbound Interchange Entry dialog box is used to specify a new interchange definition.

Note

EDIFACT version 4 defines the infrastructure necessary to support the creation (and processing) of interchanges that have been encoded using a character set other than 8-bit ASCII. Gentran:Server for Windows supports the processing of an encoded interchange as long as the encoding of the interchange matches the default code page of the operating system where Gentran:Server is running.

Diagram The following illustrates the Outbound Interchange Entry dialog box with the Advanced options displayed:

The screenshot shows the 'Outbound Interchange Entry - PETZONE' dialog box. The main section contains the following fields and buttons:

- Description: Outbrd X3030 FA Int
- Standard: X12
- Version: 003030
- Interchange ID: ISA
- Buttons: Save, Exit, Envelope..., << Advanced, Help

The 'Advanced' options section is expanded and includes:

- Use the default Mailbox and E-mail Address
- Mailbox: GENTRAN Application
- E-mail Address: (empty)
- Buttons: New Mailbox, Edit Mailbox
- Content Type: Application/EDI
- Set Max Number of Documents per Interchange
- Max Number of Documents per Interchange: 0
- Last Used Control Number: 00000000
- Expect Acknowledgement
- Hours Overdue: 0
- Interchange Transl. Obj.: ISA Build Template - ANSI
- Acknowledge Transl. Obj.: (empty)

Parts and functions

The following lists the parts of the Outbound Interchange Entry dialog box and their functions:

Part	Function
Description	Displays the name of the interchange description.
Standard	Displays the EDI standard the system is using for this relationship definition.
Version	Displays the version of the EDI standard the system is using for this relationship.
Interchange ID	Displays the type of interchange you specified. The standard defines which interchange ID should be used with each standard. This is a mandatory box. Example ANSI X12 - ISA ICS UCS - BG EDIFACT - UNB Tradacoms - STX
Use the default Mailbox and E-mail Address	Specify that the system will use the default Mailbox and E-mail address specified on the Partner Definition (New/Edit) Dialog Box.
Mailbox/ New Mailbox	Specify a mailbox to use to identify this partner for RosettaNet relationships. Or, click New Mailbox to display the Create New Mailbox wizard, which allows you to create a new mailbox. Reference See the <i>Communications User's Guide</i> for more information.
E-mail Address/ Edit Mailbox	Specify an e-mail address to identify this partner for RosettaNet relationships. Or, click Edit Mailbox to display the Mailbox Properties dialog box, which allows you to edit the mailbox. Reference See the <i>Communications User's Guide</i> for more information.
Content Type	Specify the content type of the interchange. (Continued on next page)

Part	Function
Set Max Number of Documents per Interchange	Instruct the system to only allow the specified maximum number of documents per interchange for this relationship.
Max Number of Documents per Interchange	Specify the maximum number of documents allowed per interchange for this relationship.
Last Used Control Number	Specify a value that will be used to generate the next interchange control number. The number generated is always one more than the number in this box. Initially, this box will be set to zero.
Expect Acknowledgement	Instruct the system to expect a functional acknowledgement to be received from this trading partner as a result of your partner receiving the interchange set defined in this relationship. The default value for this box is not checked (do not expect an acknowledgement).
Hours Overdue	<p>Specify how many hours must elapse before an expected functional acknowledgement is considered overdue. This box is only valid if the Expect Acknowledgement box is checked. The default value for this box is “48,” indicating that the acknowledgement will be considered overdue in two days. If you enter a value of zero in this box, the acknowledgement will be immediately considered overdue.</p> <p>Note This box is disabled if Expect Acknowledgement is <i>not</i> checked.</p>
Interchange Transl. Obj.	<p>Select a partner-specific Interchange Build Map translation object if this trading partner interchange deviates from the normal system behavior. You must select a translation object from this list if you want the system to perform partner-specific interchanging.</p> <p>Warning We strongly recommend that you do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Acknowledge Transl. Obj.	<p>Select an Acknowledgement Build Map if one exists on the system.</p> <p>You must select a translation object from the Acknowledge Transl. Obj. list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner interchange. When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list.</p> <p>Warning We strongly recommend that you do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.</p>
Save	Saves the modified information.
Exit	Exits the Outbound Interchange Entry dialog box.
Envelope	<p>Accesses one of the following Outbound Interchange Envelope dialog boxes depending on which version you specified on the Outbound Relationship Dialog Box:</p> <ul style="list-style-type: none"> ▶ Outbound ISA Envelope ▶ Outbound ICS Envelope ▶ Outbound BG Envelope ▶ Outbound UNB Envelope ▶ Outbound UNA Envelope ▶ Outbound STX Envelope ▶ Outbound VDA Envelope ▶ Outbound NCPDP Envelope ▶ Outbound Envelope PIP Initiation <p>Reference Refer to the Partner Editor online help for specific information about the envelope dialog boxes.</p>
Advanced	Toggles the display of the advanced options.
Help	Displays Online Help.

Creating a Partner Definition

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

Prerequisite knowledge 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 partner definition, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	Click New . System response The system displays the Partner Definition (New/Edit) Dialog Box.
3	In the Profile ID box, type a unique alphanumeric Profile ID for this partner. Note Do not use special characters.
4	In the Name box, type the partner name.
5	In the EDI Code box, type the EDI identifier for this partner. Note The system uses this identifier during inbound processing to select the correct partner. (Continued on next page)

Step	Action
6	<p>If necessary, in the Application Code box, type an application code to identify this partner.</p> <p>Note The system uses this identifier during outbound import processing, to select the correct partner.</p>
7	<ul style="list-style-type: none"> ▶ Select the appropriate mailbox from the Default Mailbox list. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> ▶ Click New Mailbox to create a new mailbox. <p>Note See the <i>Communications User's Guide</i> for more information about creating mailboxes.</p>
8	<p>After you enter all the partner definition information, click Save.</p>
9	<p>Click Exit to return to the Partner Editor dialog box.</p> <p>Note To complete the partner profile, you need to define an inbound or outbound relationship or both.</p> <ul style="list-style-type: none"> ▶ If you are receiving and processing information from this trading partner, you need to define an appropriate inbound relationship established. ▶ If you are sending information to this trading partner, you need to define an outbound relationship.

Creating an Inbound Relationship

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

Necessary parameters You must set up several parameters that are used to create an inbound relationship. These parameters tell the system the following information:

- The type of data 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. See *Registering New Translation Objects* on page 2 - 7 for instructions.

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 should be used to verify it. The inbound interchange defines the format of the interchange and the parameters that should be used to verify it.

However, for some transactions, the functional group or interchange is optional and if your trading partner has chosen not to use it then it is not necessary for you to select one. Refer to the following standards 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*.

(Continued on next page)

Inbound groups and interchanges (contd)

- 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 still 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 know the following information to plan the implementation of this partner:

- The EDI standard you expect from this trading partner (such as ANSI)
- The standard version you expect from this trading partner (such as 003020 for ANSI or 090001 for EDIFACT)
- The code for the transaction set you expect from this trading partner (such as “INVOIC” for 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, where you define everything that is necessary to establish the relationship.

Process of defining an inbound relationship

The following describes the process for defining an inbound relationship:

Stage	Description
1	Create a new inbound relationship.
2	<p>Create and register the inbound translation object to be used with this relationship.</p> <p>Reference See the Application Integration User’s Guide for more information about creating a translation object. Also see <i>Registering New Translation Objects</i> on page 2 - 7 for more information.</p> <p style="text-align: right;">(Continued on next page)</p>

Stage	Description
3	Select at least one inbound translation object.
4	<p>Create and select at least one inbound group to define how the document is received from this partner.</p> <p>Note Depending on the standards you are using, either the functional group or interchange may be optional. (See <i>Inbound groups and interchanges</i> on page 3 - 58 to determine what is optional for the standard you are using.)</p>
5	<p>Create and select at least one inbound interchange to define how the document is received from this partner.</p> <p>Note Depending on the standards you are using, either the functional group or interchange may be optional. (See <i>Inbound groups and interchanges</i> on page 3 - 58 to determine what is optional for the standard you are using.)</p>
6	<p>If you are generating functional acknowledgements as a result of receiving documents for an inbound relationship, you must set up the corresponding outbound relationship to generate the acknowledgements your partner requests.</p> <p>Reference See <i>Creating an Outbound Relationship</i> on page 3 - 66 for more information.</p>

Procedure To create an inbound relationship, complete the following steps:

Step	Action
Creating a new inbound relationship	
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile for which you want to create an inbound relationship. ▶ Click Inbound. System response The system displays the Inbound Relationship Dialog Box. Note You must have already created a partner definition for this partner. Reference See <i>Creating a Partner Definition</i> on page 3 - 56 for more information.
3	Click New . System response The system displays the New Inbound Relationship dialog box.
4	In the description box, type a unique relationship name (such as Inbound Invoice).
5	Click Save . System response The system creates an inbound relationship and returns to the Inbound Relationship dialog box. <div style="text-align: right;">(Continued on next page)</div>

Step	Action
6	<p>From the appropriate drop-down lists on the Inbound Relationship dialog box, select the following:</p> <ul style="list-style-type: none"> ▶ Standard ▶ Version ▶ Transaction Set ▶ Release (for TRADACOMS only) <p>Notes</p> <ul style="list-style-type: none"> ▶ The contents of these lists are displayed from the translation objects registered in Gentran:Server. For example, if there are no translation objects for ANSI X12 version 003040 registered with Gentran, you will not be able to select that version on this dialog box. ▶ The information required for this dialog box should be provided to you by your trading partner when this partner defines the details of the transactions they send you.
7	<p>If you need to define parameters to comply with the processing needs of your partner (such as Sequence Checking, Last Used Control, Duplicate Documents, or Generate Acknowledgement), click Advanced.</p> <p>System response The system displays the Advanced fields on the Inbound Relationship dialog box.</p>
Selecting an inbound translation object	
1	<p>On the Inbound Relationship dialog box, click Translation.</p> <p>System response The system displays the Inbound Translation Object Dialog Box.</p>
2	<p>From the drop-down lists, select the translation objects required for this inbound relationship.</p> <p>Note</p> <ul style="list-style-type: none"> ▶ The lists display all translation objects registered in the system that are appropriate for the type of translation object (such as Export or Print) and the transaction set. ▶ If there are no translation objects displayed in the drop-down lists, no translation objects of that type are registered for the version of the document defined in the relationship. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
3	If you selected an Export File translation object and you want to export to a specific file, type the universal naming convention (UNC) name of that file in the Export File Name box.
4	<p>Do you want to use the “Export to Mailbox” function to specify a mailbox and E-mail address so the output of the inbound translation object can be delivered directly back to the Mailbox Server Manager?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select Export to Mailbox and complete the appropriate boxes. Continue with the next step. <p>Reference See <i>Inbound Translation Object Dialog Box</i> on page 3 - 15 for more information.</p> <ul style="list-style-type: none"> ▶ If <i>no</i>, continue with the next step.
5	Click Save to save your selections and return to the Inbound Relationship dialog box.
Selecting an inbound functional group	
1	<p>On the Inbound Relationship dialog box, click Groups to display a list of existing groups.</p> <p>System response The system displays the Inbound Group Select Dialog Box.</p>
2	<p>Is the required group in the Groups list?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the group. Or, if you are not using groups, select <none>. <p>Then, click Select. Continue with <i>Selecting an inbound interchange</i> on page 3 - 64.</p> <p>System response This action selects the highlighted group and returns you to the Inbound Relationship dialog box.</p> <ul style="list-style-type: none"> ▶ If <i>no</i>, continue with the next step to create the group.
3	<p>On the Inbound Group Select dialog box, click New.</p> <p>System response The system displays the Inbound Group Entry Dialog Box.</p>
4	<p>In the Description box, type the group description.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
5	<p>In the Functional Group ID box, type the identification of the functional group you are specifying.</p> <p>Note 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 to display the full list of functional group setup options.</p> <p>System response The system displays the Advanced fields on the Inbound Group Entry dialog box.</p>
7	<p>After you set up the required parameters in this dialog box, click Save to store the information and return to the Inbound Group Select dialog box.</p>
8	<ul style="list-style-type: none"> ▶ Highlight the new group. ▶ Click Select. <p>System response Selects the group and returns to the Inbound Relationship dialog box.</p>
Selecting an inbound interchange	
1	<p>On the Inbound Relationship dialog box, click Interchanges to display a list of existing interchanges.</p> <p>System response The system displays the Inbound Interchange Select Dialog Box.</p>
2	<p>Is the required interchange in the Interchanges list?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the group. Or, if you are not using groups, select <none>. Then, click Select. Continue with <i>Finalizing the inbound relationship</i> on page 3 - 65. <p>System response This action selects the highlighted interchange and returns you to the Inbound Relationship dialog box.</p> <ul style="list-style-type: none"> ▶ If <i>no</i>, continue with the next step to create the interchange. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
3	<p>On the Inbound Interchange Select dialog box, click New.</p> <p>System response The system displays the Inbound Interchange Entry Dialog Box.</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>Note 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 to display the full list of interchange setup options.</p> <p>System response The system displays the Advanced fields on the Inbound Interchange Entry dialog box.</p>
7	<p>After you set up the required parameters in this dialog box, click Save to store the information and return to the Inbound Interchange Select dialog box.</p>
8	<ul style="list-style-type: none"> ▶ Highlight the new interchange. ▶ Click Select. <p>System response Selects the interchange and returns to the Inbound Relationship dialog box.</p>
Finalizing the inbound relationship	
1	<p>On the Inbound Relationship dialog box, click Save to save the inbound relationship.</p>
2	<p>Click Exit to return to the Partner Editor dialog box.</p>

Creating an Outbound Relationship

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.

Necessary parameters You must set up several parameters that are used to create an outbound relationship. These parameters tell the system 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. See *Registering New Translation Objects* on page 2 - 7 for instructions.

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.

However, for some transactions, the functional group or interchange is optional, and if your trading partner has chosen not to use it, it is not necessary for you to select one. Refer to the following standards descriptions 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*.

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Outbound groups and interchanges (contd)

- 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 still 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 know the following information to plan the implementation of this partner:

- The EDI standard this trading partner expects (such as ANSI X12)
- The standard version that this partner expects (such as 003020 for ANSI or 090001 for EDIFACT)
- The code for the transaction set you use (such as “INVOIC” for 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.

Process of defining an outbound relationship

The following describes the process of defining an outbound relationship.

Stage	Description
1	Create a new outbound relationship.
2	If you are using the EDIFACT, ODETTE, or TRADACOMS standard, you must complete the envelope (header) information for this type of document. For the ANSI, UCS, and TDCC standards, the envelope information is optional. (Continued on next page)

Stage	Description
3	<p>Create and register the inbound translation object to be used with this relationship.</p> <p>Reference See the Application Integration User's Guide for more information about creating a translation object. Also see <i>Registering New Translation Objects</i> on page 2 - 7 for more information.</p>
4	<p>Select at least one outbound translation object.</p>
5	<p>Create and select at least one outbound group (including enveloping information) to define how the document is received from this partner.</p> <p>Note Depending on the standards you are using, either the functional group or interchange may be optional. (See <i>Outbound groups and interchanges</i> on page 3 - 66 to determine what is optional for the standard you are using.)</p>
6	<p>Create and select at least one outbound interchange (including enveloping information) to define how the document is received from this partner.</p> <p>Note Depending on the standards you are using, either the functional group or interchange may be optional. (See <i>Outbound groups and interchanges</i> on page 3 - 66 to determine what is optional for the standard you are using.)</p>
7	<p>If you will receive functional acknowledgements for the outbound documents, set up the corresponding inbound relationship to receive the acknowledgements you expect from your partner.</p> <p>Reference See <i>Creating an Inbound Relationship</i> on page 3 - 58 for more information.</p>

Procedure To create an outbound relationship, complete the following steps:

Step	Action
Creating a new outbound relationship	
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile for which you want to create an outbound relationship. ▶ Click Outbound. System response The system displays the Outbound Relationship Dialog Box. Note You must have already created a partner definition for this partner. Reference See <i>Creating a Partner Definition</i> on page 3 - 56 for more information.
3	Click New . System response The system displays the New Outbound Relationship dialog box.
4	In the description box, type a unique relationship name.
5	Click Save . System response The system creates an outbound relationship and returns to the Outbound Relationship dialog box. <div style="text-align: right;">(Continued on next page)</div>

Step	Action
6	<p>From the appropriate drop-down lists on the Outbound Relationship dialog box, select the following:</p> <ul style="list-style-type: none"> ▶ Standard ▶ Version ▶ Transaction Set ▶ Release (for TRADACOMS only) <p>Notes</p> <ul style="list-style-type: none"> ▶ The contents of these lists are displayed from the translation objects registered in Gentran:Server. For example, if there are no translation objects for ANSI X12 version 003040 registered with Gentran, you will not be able to select that version on this dialog box. ▶ The information required for this dialog box should be provided to you by your trading partner when this partner defines the details of the transactions they send you.
7	<p>If you need to define parameters to comply with the processing needs of your partner (such as Last Used Control Number, Expect Acknowledgement, Hours Overdue, Duplicate Documents, or Test Indicator), click Advanced.</p> <p>System response The system displays the Advanced fields on the Outbound Relationship dialog box.</p>
<p>Selecting a transaction envelope (mandatory for EDIFACT, ODETTE, and TRADACOMS standards—optional for ANSI, UCS, and TDCC)</p>	
1	<p>If you are using the EDIFACT, ODETTE, or TRADACOMS standard, click Envelope to complete the envelope (header) information.</p> <p>Note For the ANSI, UCS, and TDCC standards, the envelope information is optional.</p> <p>System response The system displays one of the following dialog boxes:</p> <ul style="list-style-type: none"> ▶ Outbound UNH Envelope dialog box ▶ Outbound MHD Envelope dialog box ▶ Outbound ST Envelope dialog box <p style="text-align: right;">(Continued on next page)</p>

Step	Action
2	Enter the appropriate information and click Save . System response Saves the information and returns to the Outbound Relationship dialog box.
Selecting an outbound translation object	
1	On the Outbound Relationship dialog box, click Translation . System response The system displays the Outbound Translation Object Dialog Box.
2	From the drop-down lists, select the translation objects required for this outbound relationship. Note <ul style="list-style-type: none"> ▶ 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. ▶ If there are no translation objects displayed in the drop-down lists, no translation objects of that type are registered for the correct version of the document defined in the relationship.
3	If you selected an Import translation object, you may need to define the following: <ul style="list-style-type: none"> ▶ In the Application ID box, type the application identifier that indicates the destination for the documents. ▶ In the Application Alias Value box, type criteria that the system will use to distinguish this relationship from others during the application import function.
4	Click Save to save your selections and return to the Outbound Relationship dialog box.
Selecting an outbound functional group	
1	On the Outbound Relationship dialog box, click Groups to display a list of existing groups. System response The system displays the Outbound Group Select Dialog Box. (Continued on next page)

Step	Action
2	<p>Is the required group in the Groups list?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the group. Or if you are not using groups, select <none>. <p>Then, click Select. Continue with <i>Selecting an outbound interchange</i> on page 3 - 73.</p> <p>System response This action selects the highlighted group and returns you to the Outbound Relationship dialog box.</p> <ul style="list-style-type: none"> ▶ If <i>no</i>, continue with the next step to create the group.
3	<p>On the Outbound Group Select dialog box, click New.</p> <p>System response The system displays the Outbound Group Entry Dialog Box.</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.</p> <p>Note 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.</p> <p>System response The system displays the Advanced fields on the Outbound Group Entry dialog box.</p> <p>Recommendation 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;">(Continued on next page)</p>

Step	Action
7	<p>Click Envelope to set up the parameters for the generation of the Functional Group segment.</p> <p>System response The Outbound Functional Group dialog box displayed is one of the following depending on the standard you selected on the Outbound Relationship dialog box:</p> <ul style="list-style-type: none"> ▶ Outbound GS Functional Group ▶ Outbound UNG Functional Group ▶ Outbound BAT Functional Group
8	<p>After you set up the required parameters in the enveloping dialog box, click Save to store the information and return to the Outbound Group Entry dialog box.</p>
9	<p>Click Save to store the information about the Outbound Group Entry dialog box and return to the Outbound Group Select dialog box.</p>
10	<ul style="list-style-type: none"> ▶ Highlight the new group. ▶ Click Select. <p>System response Selects the group and returns to the Outbound Relationship dialog box.</p>
Selecting an outbound interchange	
1	<p>On the Outbound Relationship dialog box, click Interchanges.</p> <p>System response The system displays the Outbound Interchange Select Dialog Box.</p>
2	<p>Is the required interchange in the Interchanges list?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the interchange. Or if you are not using groups, select <none>. Then, click Select. Continue with <i>Finalizing the outbound relationship</i> on page 3 - 75. <p>System response This action selects the highlighted interchange and returns you to the Outbound Relationship dialog box.</p> <ul style="list-style-type: none"> ▶ If <i>no</i>, continue with the next step to create the interchange. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
3	<p>On the Outbound Interchange Select dialog box, click New.</p> <p>System response The system displays the Outbound Interchange Entry Dialog Box.</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.</p> <p>Note 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.</p> <p>System response The system displays the Advanced fields on the Outbound Interchange Entry dialog box.</p> <p>Recommendation 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>
7	<p>Do you want to use the default Mailbox and E-mail Address?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, continue with step 9. ▶ If <i>no</i>, continue with the next step.
8	<ul style="list-style-type: none"> ▶ Select the appropriate mailbox from the Default Mailbox list. <p>OR</p> <ul style="list-style-type: none"> ▶ Click New Mailbox to create a new mailbox. <p>Note See the <i>Communications User's Guide</i> for more information about creating mailboxes.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
9	<p>Click Envelope to set up the parameters for the generation of the interchange segment.</p> <p>System response The Outbound Interchange dialog box displayed is one of the following depending on the standard you selected on the Outbound Relationship dialog box:</p> <ul style="list-style-type: none"> ▶ Outbound ISA Envelope ▶ Outbound ICS Envelope ▶ Outbound BG Envelope ▶ Outbound UNB Envelope ▶ Outbound UNA Envelope ▶ Outbound STX Envelope ▶ Outbound Envelope PIP Initiation
10	After you set up the required parameters in the enveloping dialog box, click Save to store the information and return to the Outbound Interchange Entry dialog box.
11	Click Save to store the information about the Outbound Interchange Entry dialog box and return to the Outbound Interchange Select dialog box.
12	<ul style="list-style-type: none"> ▶ Highlight the new interchange. ▶ Click Select. <p>System response Selects the interchange and returns to the Outbound Relationship dialog box.</p>
Finalizing the outbound relationship	
1	On the Outbound Relationship dialog box, click Save to save the outbound relationship.
2	Click Exit to return to the Partner Editor dialog box.

Editing and Deleting Partner Definitions

Introduction

The partner definition contains the basic partner profile information to which the system associates the rest of that partner's records. You can edit and 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>System Response The system displays the Partner Editor Dialog Box.</p>
2	<ul style="list-style-type: none"> ▶ Select the appropriate partner from the Select a Partner list. ▶ Click Edit. <p>System response The system displays the Partner Definition (New/Edit) Dialog Box for that partner.</p>
3	<ul style="list-style-type: none"> ▶ Make the necessary changes. ▶ Click Save. <p>System response The system returns to the Partner Editor dialog box.</p> <p>Note</p> <ul style="list-style-type: none"> ▶ You can also edit other aspects of a partner relationship (such as inbound relationship or outbound relationship) by clicking the appropriate button (Inbound or Outbound) on the Partner Editor dialog box. ▶ You are not able to edit any boxes that are grayed; these are the "keys" to the relationship. In this case, you must create a new inbound or outbound relationship for that partner. <p>Reference See <i>Creating an Inbound Relationship</i> on page 3 - 58 and <i>Creating an Outbound Relationship</i> on page 3 - 66 for more information.</p>

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>System Response The system displays the Partner Editor Dialog Box.</p>
2	<ul style="list-style-type: none"> ▶ Select the appropriate partner from the Select a Partner list. ▶ Click Delete. <p>System response You are prompted to confirm the deletion.</p> <p>Warning</p> <ul style="list-style-type: none"> ▶ When you delete a partner relationship, the documents and interchanges associated with that partner are also deleted. ▶ If any documents or interchanges exist for a partner you choose to delete, you are warned before the actual deletion.
3	<p>Click Yes to delete the selected partner profile.</p> <p>System response The partner profile and all associated records are deleted.</p>

Routing Partner Profiles

Import File Select Dialog Box

Introduction The Import File Select dialog box enables you import a partner into the system.

Diagram The following illustrates the Import File Select dialog box:



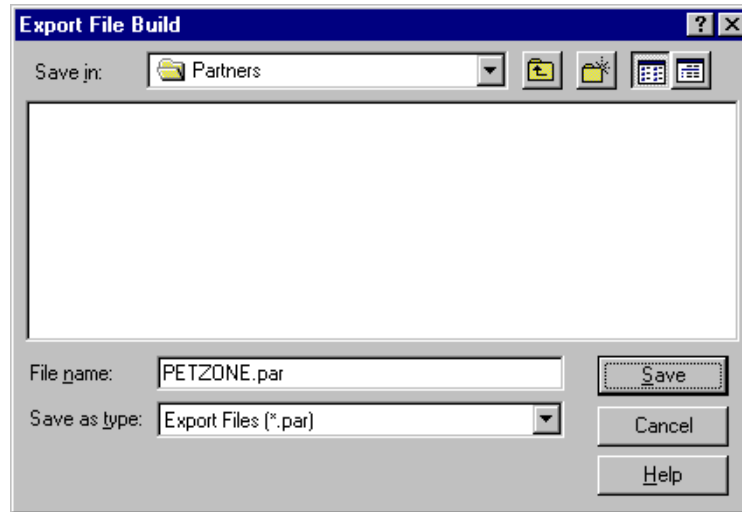
Parts and functions The following lists the parts of the Import File Select dialog box and their functions:

Part	Function
Look in	Select the folder where the system should look for the file. Displays the current folder.
File name	Specify the name of the file to be imported.
Files of type	Select the type of file. Note The default file extension for partners is .par.
Open	Begins the import process for the selected partner file.
Cancel	Cancels the action and exits the dialog box.
Help	Displays Online Help.

Export File Build Dialog Box

Introduction The Export File Build dialog box enables you to specify the name of a partner export file and begins the export process.

Diagram The following illustrates the Export File Build dialog box:



Parts and functions The following lists the parts of the Export File Build dialog box and their functions:

Part	Function
Save in	Select the folder where you want to save the file. Displays the current folder.
File name	<p>Specify the name of the file to be exported.</p> <p>Note The Partner Name field is used to generate the file name. If the Partner Name contains any Windows reserved characters (/, \, :, *, ?, ", <, >,), the file drops those characters and pads the file name with spaces (one space for each reserved character in the name).</p> <p>Example If the Partner Name is AB/CD-TEST, the file name will be AB CD TEST.par.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Save type	Select the type of file. Note The default file extension for partners is .par.
Save	Begins the export process.
Cancel	Exits the dialog box without making a selection.
Help	Displays Online Help.

Partner Copy Dialog Box

Introduction The partner copy feature allows you to copy partner information. Once you copy the partner, this dialog enables you to change the partner definition and other identifying boxes for the copied partner.

Note

You must export the partner profile before you copy it. See *Exporting Partner Profiles* on page 3 - 87 for more information. If you do not know which EDI standard that partner profile uses, check the profile to obtain that information before you export and copy it.

Diagram The following illustrates the Partner Copy dialog box:

Profile ID:	<input type="text"/>	<input type="button" value="Select Partner"/>	<input type="button" value="Save"/>
Name:	<input type="text"/>	<input type="button" value="Clear"/>	
EDI Code:	<input type="text"/>	<input type="button" value="Exit"/>	
Application Code:	<input type="text"/>	<input type="button" value="Help"/>	
Default Mailbox:	<input type="text"/>		

Group Receiver Qualifier:	<input type="text"/>	Edifact with UNG only
Group Receiver ID:	<input type="text"/>	ANSI/Edifact/UCS/TDCC
Interchange Receiver Qualifier:	<input type="text"/>	ANSI/Edifact/UCS/TDCC
Interchange Receiver ID:	<input type="text"/>	ANSI/Edifact/UCS/TDCC
Interchange Communication ID:	<input type="text"/>	UCS
Interchange Password:	<input type="text"/>	UCS
Recipient Code:	<input type="text"/>	Tradacoms
Recipient Name:	<input type="text"/>	Tradacoms
Receiver DUNS+4:	<input type="text"/>	RosettaNet

Parts and functions

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

Part	Function
Profile ID	Specify a unique identifier for the selected partner.
Select Partner	Accesses the Import File Select Dialog Box, which allows you to select a partner profile to copy.
Name	Specify a unique name for the partner. Note Make this name as descriptive as possible because this is the name displayed in the partner selection list.
EDI Code	Specify the EDI identifier for this partner. The system uses this value during inbound processing to select the correct trading partner definition.
Application Code	Specify an application code used to identify this partner. The system uses this value during outbound import processing to select the correct trading partner definition.
Default Mailbox	Select the mailbox to identify this partner. Reference See the <i>Communications User's Guide</i> for more information.
Group Receiver Qualifier	Specify your partner's Qualifier as it will appear on the UNG group header. Qualifiers are predefined by the EDI standards. Note If the partner profile uses the EDIFACT or ODETTE standard, you <i>must</i> complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.
Group Receiver ID	Specify your partner's Group ID. The value can be up to 15 characters. Note If the partner profile uses the ANSI, EDIFACT, ODETTE, UCS, or TDCC standard, you <i>must</i> complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information. (Continued on next page)

Part	Function
Interchange Receiver Qualifier	<p>Specify your partner's Qualifier as it will appear on the interchange header. Qualifiers are predefined by the EDI standards. The value can be up to four characters.</p> <p>Note If the partner profile uses the ANSI, EDIFACT, ODETTE, UCS, or TDCC standard, you <i>must</i> complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.</p>
Interchange Receiver ID	<p>Specify your partner's Interchange ID. The value can be up to 15 characters.</p> <p>Note If the partner profile uses the ANSI, EDIFACT, ODETTE, UCS, or TDCC standard, you <i>must</i> complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.</p>
Interchange Communication ID	<p>Specify your BG communication identifier. This ID will appear on the BG Interchange Header.</p> <p>Note If the partner profile uses the UCS standard, you <i>must</i> complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.</p>
Interchange Password	<p>Specify a password that is agreed upon by you and your trading partner. This password will appear on the BG Interchange Header.</p> <p>Note If the partner profile uses the UCS standard, you <i>must</i> complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.</p>
Recipient Code	<p>Specify the code agreed on by you and your partner.</p> <p>Notes</p> <ul style="list-style-type: none"> • If the partner profile uses the TRADACOMS standard, you <i>must</i> complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information. • The Recipient Code is mandatory if you do not complete the Recipient Name box. <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Recipient Name	<p>Specify your partner's name.</p> <p>Notes</p> <ul style="list-style-type: none">• If the partner profile uses the TRADACOMS standard, you <i>must</i> complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.• The Recipient Name is mandatory if you do not complete the Recipient Code box.
Receiver DUNS+4	<p>Specify the DUNS number of your partner.</p> <p>Note This value is mandatory.</p>
Save	Saves the modified information.
Clear	Clears the information from the dialog box.
Exit	Exits the Partner Copy dialog box.
Help	Displays Online Help.

Importing Partner Profiles

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:Server 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:Server 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 (cross-reference, lookup, or location) attached to the partner profile are also imported.

Reference

See the Partner File Layouts appendix in the *Administration Guide* for more information.

Before you begin

You must create a mailbox for the partner prior to loading the partner profile. Please see the *Communications Guide* for more information.

Procedure

To import a partner profile, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	Click Import . System response The system displays the Import File Select Dialog Box.
3	Select the partner file by doing the following: <ul style="list-style-type: none"> ▶ Navigate to the folder using the Look in drop-down list. ▶ Select the file or type the file name in the File name box. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
4	<p>Click Open.</p> <p>System response The system displays the Import dialog box.</p> <p>Note This dialog box allows you verify 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>System response The system imports the partner details (if they do not already exist on the system) and any relationships for which there are translation objects. 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>When the import is complete, the system displays the following message:</p> <pre>Import process completed. Please note any warnings or errors.</pre>
7	Click OK to return to the Import dialog box.
8	Click Exit to return to the Partner Editor dialog box.

Exporting Partner Profiles

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

Note

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

Reference

See the Partner File Layouts appendix in the *Administration Guide* for more information.

Procedure To export a partner profile, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select a partner. ▶ Click Export. System response The system displays the Export File Build Dialog Box.
3	Name the export file by doing the following: <ul style="list-style-type: none"> ▶ Navigate to the correct folder using the Look in list. ▶ Type the name in the File name box. Note The system automatically prompts you to name the export file with the name of the partner and the .par extension.
4	Click Save to export the partner.

Copying Partner Profiles

Introduction The partner copy function enables you to copy partner information so you do not have to type in similar partner profiles from scratch. Instead, you can copy from an existing profile and enter unique partner definition and key enveloping information for the copied partner.

The partner copy function provides a quick method for establishing partners that 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 to obtain that information before you export and copy it.

Reference

See *Exporting Partner Profiles* on page 3 - 87 for more information.

Procedure To copy a partner profile, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	Click Copy . System response The system displays the Partner Copy Dialog Box.
3	Click Select Partner . System response The system displays the Import File Select Dialog Box.
4	Select the file you want to copy by doing the following: <ul style="list-style-type: none"> ▶ Navigate to the folder using the Look in list. ▶ Type the file name in the File name box.
5	Click Open to copy that partner. Note The system displays the model partner profile name in the title bar of the Partner Copy dialog box. The default file extension for exported partners is .par. <div style="text-align: right;">(Continued on next page)</div>

Step	Action
6	On the Partner Copy dialog box, type a unique profile identifier in the Profile ID box.
7	In the Name box, type the partner name.
8	<p>In the EDI Code box, type the EDI identifier for this partner.</p> <p>Note The system uses this identifier during inbound processing to select the correct partner.</p>
9	<p>If necessary, in the Application Code box, type an application code to identify this partner.</p> <p>Note The system uses this identifier during outbound import processing to select the correct partner.</p>
10	<p>Select the appropriate mailbox from the Default Mailbox list.</p> <p>Note See the <i>Communications User's Guide</i> for more information.</p>
11	<p>Complete the appropriate boxes in the enveloping section of the dialog box.</p> <p>Note</p> <ul style="list-style-type: none"> • You should only complete those boxes that are necessary for the standard the copied partner profile uses. The standards are listed to the right of each box. • 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>Example If the copied partner profile uses the UCS standard, you must complete the Interchange Communication ID box, among others.</p>
12	<p>After you enter all the partner information, click Save.</p> <p>System response The system displays the Outbound Interchange Entry Dialog Box.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
13	<p>Do you need to change the default mailbox?</p> <ul style="list-style-type: none">▶ If <i>yes</i>, select the appropriate mailbox from the Default Mailbox list. Or click New Mailbox to create a new mailbox. Then, click Save.▶ If <i>no</i>, click Save. <p>System response The system completes the partner copy operation, displays a completion message.</p>
14	<p>Click OK.</p> <p>System Response The system returns to the Partner Copy dialog box.</p>
15	<p>Click Exit to return to the Partner Editor dialog box.</p>

Using 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 allows you to use an internal system partner (Internal System User) to define your company to the system. Tables may be set up to be used either with 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 that you either enter or receive.

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

Notes

- You can only import and export Gentran:Server partner tables.
 - Tables are used only if you create a translation object that specifically accesses those tables.
-

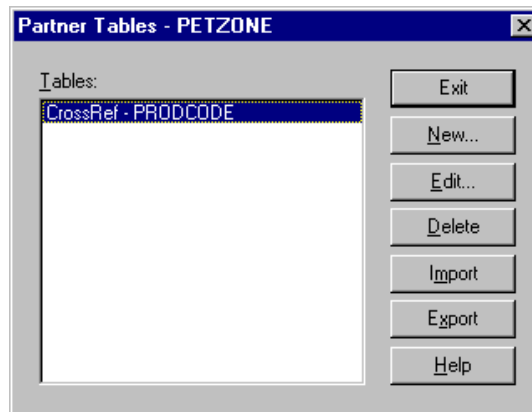
Partner Tables Dialog Box

Introduction

The Partner Tables dialog box enables you to create, edit, or delete cross-reference or lookup tables. Tables are only used with translation objects that are designed to incorporate that data. When you receive a translation object from Sterling Commerce, you will be informed if you need to create tables to be used with that translation object.

Diagram

The following illustrates the Partner Tables dialog box:



Parts and functions

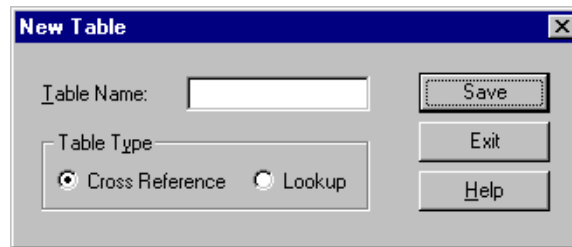
The following lists the parts of the Partner Tables dialog box and their functions:

Part	Function
Tables	Displays all currently defined partner tables.
Exit	Exits the Partner Tables dialog box.
New	Accesses the New Table Dialog Box, which allows you to create a new table.
Edit	Accesses either the CrossRef Select Dialog Box or the Lookup Select Dialog Box, which allows you to edit the selected table.
Delete	Removes the selected partner table from the system.
Import	Accesses the Table Import File Select Dialog Box, which enables you to import a partner table.
Export	Accesses the Table Export File Build Dialog Box, which enables you to export a partner table.
Help	Displays Online Help.

New Table Dialog Box

Introduction The New Table dialog box enables you to create a cross-reference or lookup table.

Diagram The following illustrates the New Table dialog box:



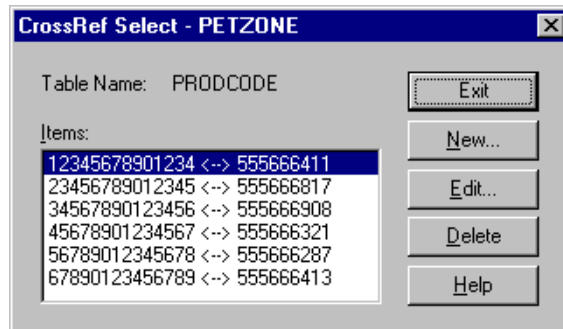
Parts and functions The following lists the parts of the New Tables dialog box and their functions:

Part	Function
Table Name	Specify the name of the table. Note The table name must be the same as the name used in the translation object that requires the table. If your database is case-sensitive, when you reference the table using standard or extended rules, you must type the exact name of the table (including case). Reference See the <i>Application Integration User's Guide</i> for more information about standard and extended rules.
Table Type	Specify the type of table. Valid values: Cross-Reference Used to convert your values to your trading partner's values during outbound processing, and to convert your trading partner's values to your values during inbound processing. Lookup Used to find values in inbound or outbound data.
Save	Saves the modified information.
Exit	Exits the New Table dialog box.
Help	Displays Online Help.

CrossRef Select Dialog Box

Introduction The CrossRef Select dialog box contains all cross-reference partner tables.

Diagram The following illustrates the CrossRef Select dialog box:



Parts and functions

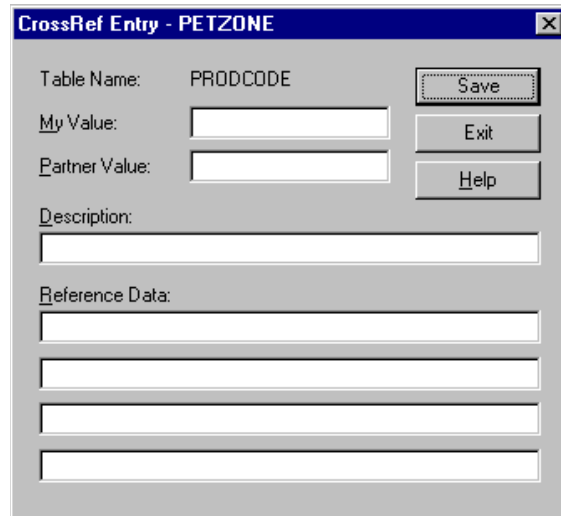
The following lists the parts of the CrossRef Select dialog box and their functions:

Part	Function
Items	Displays a list of table items.
Exit	Exits the CrossRef Select dialog box.
New	Accesses the CrossRef Entry Dialog Box, which allows you to create a new table item.
Edit	Accesses the CrossRef Entry Dialog Box, which allows you to edit the selected table item.
Delete	Removes the selected table item.
Help	Displays Online Help.

CrossRef Entry Dialog Box

Introduction The CrossRef Entry dialog box enables you to create a new table item.

Diagram The following illustrates the CrossRef Entry dialog box:



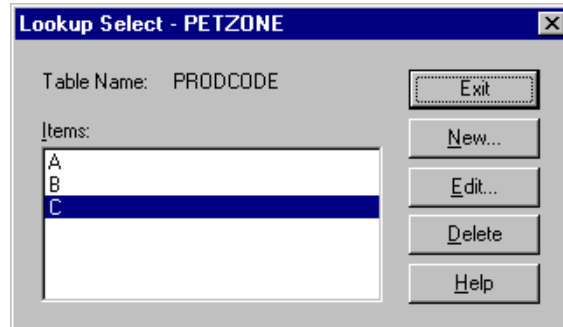
Parts and functions The following lists the parts of the CrossRef Entry dialog box and their functions:

Part	Function
My Value	Specify your data value that corresponds to your partner's data value.
Partner Value	Specify your partner's data value that corresponds to your data value.
Description	Specify a description of the codes.
Reference Data	Specify up to four values that can be mapped when they are associated with a specific code value. Note These boxes are <i>not</i> currently used by Gentran:Server.
Save	Saves the modified information.
Exit	Exits the CrossRef Entry dialog box.
Help	Displays Online Help.

Lookup Select Dialog Box

Introduction The Lookup Select dialog box contains all lookup partner tables.

Diagram The following illustrates the Lookup Select dialog box.



Parts and functions

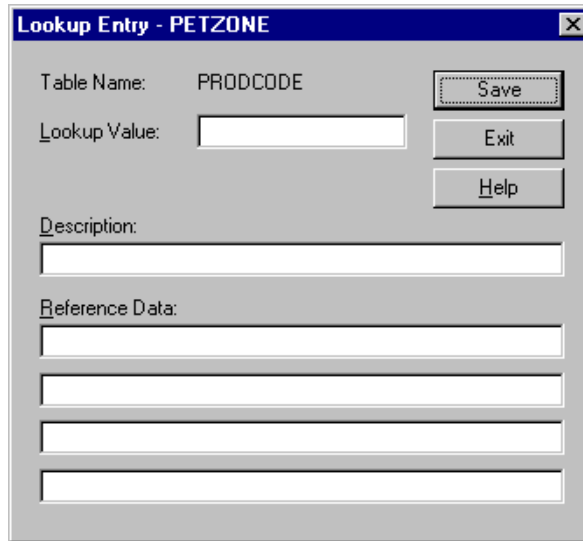
The following lists the parts of the Lookup Select dialog box and their functions:

Part	Function
Items	Displays a list of table items.
Exit	Exits the Lookup Select dialog box.
New	Accesses the Lookup Entry Dialog Box, which allows you to create a new table item.
Edit	Accesses the Lookup Entry Dialog Box, which allows you to edit the selected table item.
Delete	Removes the selected table item.
Help	Displays Online Help.

Lookup Entry Dialog Box

Introduction The Lookup Entry dialog box enables you to create a new table item.

Diagram The following illustrates the Lookup Entry dialog box:



Parts and functions The following lists the parts of the Lookup Entry dialog box and their functions:

Part	Function
Lookup Value	Specify the value that will be looked up in the data during inbound or outbound processing.
Description	Specify a description of the code.
Reference Data	Specify up to four values that can be mapped when they are associated with a specific code value. Note These boxes are <i>not</i> currently used by Gentran:Server.
Save	Saves the modified information.
Exit	Exits the CrossRef Entry dialog box.
Help	Displays Online Help.

Table Export File Build Dialog Box

Introduction

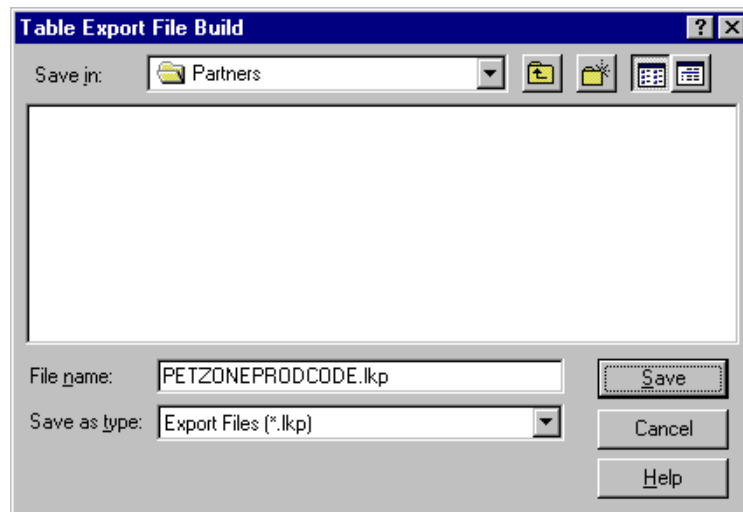
The Table Export function allows you to export partner cross-reference and lookup tables to a sequential file. This allows you to define a table for one trading partner and copy that table to another partner profile.

Notes

- You can only export Gentran:Server partner tables.
- The default file extension for cross-reference tables is .xrf. The default file extension for lookup tables is .lkp.

Diagram

The following illustrates the Table Export File Build dialog box:



Parts and functions

The following lists the parts of the Table Export File Build dialog box and their functions:

Part	Function
Save in	Select the folder where you want to save the file. Displays the current folder.
File name	Specify the name of the file to be exported.
Save as type	Select the type of file. Note The default file extension for cross-reference tables is .xrf and for lookup tables is .lkp. (Continued on next page)

Part	Function
Save	Begins the table export process.
Cancel	Exits the dialog box without making a selection.
Help	Displays Online Help.

Table Import File Select Dialog Box

Introduction

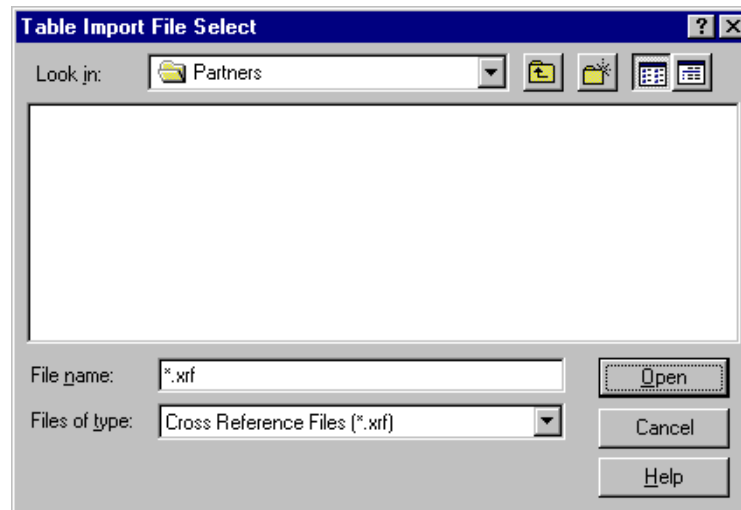
The Table Import function allows you to import partner cross-reference and lookup tables from a sequential file. This allows you to import tables created for another partner profile, share tables with other users of Gentran:Server, and build tables outside of Gentran:Server by formatting your data in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

Notes

- You can only import Gentran:Server partner tables.
- The default file extension for cross-reference tables is .xrf. The default file extension for lookup tables is .lkp.

Diagram

The following illustrates the Table Import File Select dialog box:



Parts and functions

The following lists the parts of the Table Import File Select dialog box and their functions:

Part	Function
Look in	Select the folder where you want the system to look for the file. Displays the current folder.
File name	Specify the name of the file to be imported.
Files of type	Select the type of file. Note The default file extension for cross-reference tables is .xrf and for lookup tables is .lkp. (Continued on next page)

Part	Function
Open	Begins the import process for the selected partner table file.
Cancel	Cancels the action and exits the dialog box.
Help	Displays Online Help.

Creating Partner Tables

Procedure To create a partner table, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile or the system partner (Internal System User) for which you want to create a Cross-reference or Lookup table. ▶ Click Tables. System Response The system displays the Partner Tables Dialog Box.
3	Click New . System response The system displays the New Table Dialog Box.
4	In the Table Name box, type the unique table name. Note The table name must be the same as the name used in the translation object that requires the table. If your database is case-sensitive, when you reference the table using standard or extended rules, you must type the exact name of the table (including case). Reference See the <i>Application Integration User's Guide</i> for more information about standard and extended rules.
5	In the Table Type section, select the Cross-reference or Lookup table option.
6	Click Save . System response Saves the information you entered and accesses either the CrossRef Select Dialog Box or Lookup Select Dialog Box depending on which type of table you selected in Step 5. <div style="text-align: right;">(Continued on next page)</div>

Step	Action
7	<p>Click New.</p> <p>System response Displays either the CrossRef Entry Dialog Box or Lookup Entry Dialog Box depending on which type of table you selected in Step 5.</p>
8	<p>Type the following table values:</p> <ul style="list-style-type: none"> ▶ Two values for a cross-reference and one value for a lookup table ▶ A description <p>Note How your data 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>
9	<p>Click Save after each entry to save the information and enter another table record.</p>
10	<p>Once you finish typing all entries, click Exit to return to the Cross-reference or Lookup Select dialog box.</p>
11	<p>Click Exit to return to the Partner Editor dialog box.</p>

Editing Partner Tables

Procedure To edit a partner table, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile or the system partner (Internal System User) for which you want to modify a Cross-reference or Lookup table. ▶ Click Tables. System Response The system displays the Partner Tables Dialog Box.
3	<ul style="list-style-type: none"> ▶ Select the table you want to modify. ▶ Click Edit. System response Displays either the CrossRef Select Dialog Box or Lookup Select Dialog Box (depending on the type of table).
4	<ul style="list-style-type: none"> ▶ Select the item you want to modify. ▶ Click Edit. System response Displays either the CrossRef Entry Dialog Box or Lookup Entry Dialog Box depending on the type of table.
5	Modify the entry.
6	After you finish modifying all necessary table entries, click Save . System Response The system returns to the Cross-reference or Lookup Select dialog box.
7	Click Exit . System Response The system returns to the Partner Editor dialog box.

Deleting Entries in a Partner Table

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

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile or the system partner (Internal System User) for which you want to delete a table entry. ▶ Click Tables. System Response The system displays the Partner Tables Dialog Box.
3	<ul style="list-style-type: none"> ▶ Select the table you want to modify. ▶ Click Edit. System response The system displays either the CrossRef Select Dialog Box or Lookup Select Dialog Box depending on the type of table.
4	<ul style="list-style-type: none"> ▶ Select the item you want to modify. ▶ Click Delete. System response The system displays the Confirm Delete dialog box.
5	Click Yes to complete the deletion. System response The system returns to either the CrossRef Select Dialog Box or Lookup Select Dialog Box depending on the type of table.
6	Click Exit . System Response The system returns to the Partner Editor dialog box.

Deleting Partner Tables

Procedure To delete a partner table, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none">▶ Select the partner profile for which you want to delete a table.▶ Click Tables. System Response The system displays the Partner Tables Dialog Box
3	<ul style="list-style-type: none">▶ Select the table you want to delete.▶ Click Delete. System response The system displays the Confirm Delete dialog box.
4	Click Yes to complete the deletion. System Response The system returns to the Partner Editor dialog box.

Exporting Partner Tables

Introduction The Table Export function allows 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.

Reference

See the Partner File Layouts appendix in the *Administration Guide* for more information.

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:Server 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 (separated) with Hex01 because the field lengths are variable.

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 following table identifies the fields in lookup tables. Mandatory fields are designated with an asterisk (*).

Field	Description
PartnerKEY*	Unique identifier for the partner
TableCode	For lookup, this value is “L”.
TableName*	Descriptive name for the table This value is displayed in the table selection list.
Item*	Value that is looked up in the data during inbound or outbound processing
Description	Brief comment about the item
Text1, Text2, Text3, Text4	Additional reference information as required by the translation object using this table

(Continued on next page)

**Export file layout
(contd)****Cross-reference table fields**

The following table identifies the fields in cross-reference tables. Mandatory fields are designated with an asterisk (*).

Field	Description
PartnerKEY*	Unique identifier for the partner
TableCode	For cross-reference, this value is “C”.
TableName*	Descriptive name for the table This value is displayed in the table selection list.
MyItem*	Your data value that corresponds to your partner’s data value
PartnerItem*	Your partner’s data value that corresponds to your data value
Description	Brief comment about the item
Text1, Text2, Text3, Text4	Additional reference information as required by the translation object using this table

Procedure

To export a partner table, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile or the system partner (Internal System User) for which you want to export a Cross-reference or Lookup table. ▶ Click Tables. System Response The system displays the Partner Tables Dialog Box.
3	Click Export . System response The system displays the Table Export File Build Dialog Box. (Continued on next page)

Step	Action
4	<p>From the Save in drop-down list, select the location of the exported table file.</p> <p>Note You can only export Gentran:Server partner tables.</p>
5	<ul style="list-style-type: none"> ▶ Type the export file name in the File name box. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> ▶ Select it from the list. <p>Note 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>Note When the export process is complete the system displays an informational dialog box.</p>
7	<p>Click OK.</p> <p>System Response The system returns to the Partner Tables dialog box.</p>
8	<p>Click Exit.</p> <p>System Response The system returns to the Partner Editor dialog box.</p>

Importing Partner Tables

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

Reference

See the Partner File Layouts appendix in the *Administration Guide* for more information.

Procedure To import a partner table, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile or the system partner (Internal System User) for which you want to import a Cross-reference or Lookup table. ▶ Click Tables. System Response The system displays the Partner Tables Dialog Box.
3	Click Import . System response The system displays the Table Import File Select Dialog Box.
4	From the Look in drop-down list, select the location of the table file.
5	<ul style="list-style-type: none"> ▶ Type the import file name in the File name box. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> ▶ Select it from the list. Notes <ul style="list-style-type: none"> ▶ You can only import Gentran:Server partner tables. ▶ The default file extension for cross-reference tables is .xrf. The default file extension for lookup tables is .lkp. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
6	Click Open to begin the import process. Note When the export process is complete the system displays an informational dialog box.
7	Click OK . System Response The system returns to the Partner Tables dialog box.
8	Click Exit . System Response The system returns to the Partner Editor dialog box.

Using Partner Locations

Overview

Introduction

Each partner profile may have many associated location tables. The location tables may contain address- and contact-related information about the partner. You can use location tables in many different ways. Locations are referenced in translation objects through one of the location keys (reference codes). Locations are used only if you use a translation object that specifically accesses those locations.

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.

Necessary parameters

You must set up two parameters that contain 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.

Before you begin

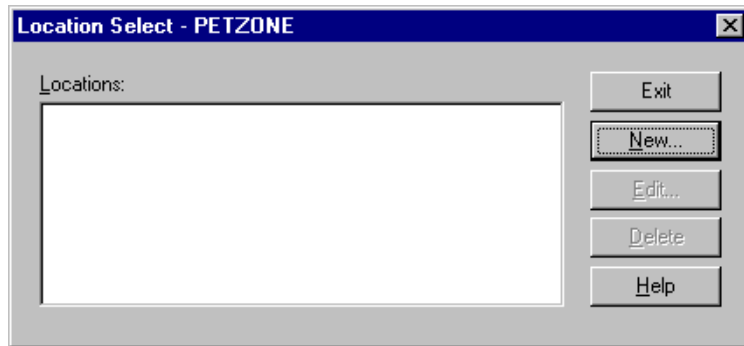
Before setting up a partner location, you must know the following information to plan the implementation of this partner:

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

Location Select Dialog Box

Introduction The Location Select dialog box allows you to add, edit, and delete partner-specific name and address information. Locations are only used with translation objects that are designed to incorporate that data.

Diagram The following illustrates the Location Select dialog box:



Parts and functions The following lists the parts of the Location Select dialog box and their functions:

Part	Function
Locations	Displays all defined locations.
Exit	Exits the Location Select dialog box.
New	Accesses the Location Entry Dialog Box, which allows you to create a new location.
Edit	Accesses the Location Entry Dialog Box, which allows you to edit the selected location.
Delete	Removes the selected location from the system.
Help	Accesses Online Help.

Location Entry Dialog Box

Introduction The Location Entry dialog box enables you to create and edit location information.

Diagram The following illustrates the Location Entry dialog box:

Parts and functions The following lists the parts of the Location Entry dialog box and their functions:

Part	Function
Name	Specify the name of this trading partner location. This name should accurately describe the location because this box will be displayed in the location selection list. Note This box is mandatory.
Reference Code1	Specify a reference code to identify the location being defined (such as a DUNS number). Note This box is mandatory.

(Continued on next page)

Part	Function
Reference Code2	Specify a reference code to identify the location being defined (such as a DUNS number).
Contact	Specify the name of a personal contact.
Address1 Address2 Address3	Specify the partner's business address.
City	Specify the partner's city.
State	Specify the partner's state.
Zip Code	Specify the partner's zip or postal code.
Country	Specify the partner's country.
Phone	Specify the partner's phone number.
Fax	Specify the partner's fax number.
Save	Saves the modified information.
Exit	Exits the Location Entry dialog box.
Help	Displays Online Help.

Creating Partner Locations

Procedure To create partner locations, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile or the system partner (Internal System User) for which you want to create a location. ▶ Click Locations. System Response The system displays the Location Select Dialog Box.
3	Click New . System response The system displays the Location Entry Dialog Box.
4	In the Name box, type a unique identifier that defines this location within the partner.
5	In the Reference Code 1 box, type the unique identifier for the location you are defining. Example The DUNS number for the location.
6	Complete the remaining boxes, as necessary. Note If you use Reference Code 2, it must also be unique.
7	Click Save . System response Saves the location information and displays a blank Location Entry dialog box.
8	If you want to enter additional locations for this partner, repeat steps 4 through 7 as many times as necessary.
9	Click Exit . System Response The system returns to the Partner Editor dialog box.

Editing Partner Locations

Procedure To edit a partner location, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile or the system partner (Internal System User) for which you want to create a location. ▶ Click Locations. System Response The system displays the Location Select Dialog Box.
3	<ul style="list-style-type: none"> ▶ From the Locations list, select a location. ▶ Click Edit. System response The system displays the Location Entry Dialog Box.
4	Make any necessary changes. Note The Reference Code1 box must be completed.
5	<ul style="list-style-type: none"> ▶ Click Save to save the location information and return to the Location Select dialog box. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> ▶ Click Exit to return to the Location Select dialog box without saving changes.
6	Click Exit . System Response The system returns to the Partner Editor dialog box.

Delete 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 . System Response The system displays the Partner Editor Dialog Box.
2	<ul style="list-style-type: none"> ▶ Select the partner profile or the system partner (Internal System User) for which you want to create a location. ▶ Click Locations. System Response The system displays the Location Select Dialog Box.
3	<ul style="list-style-type: none"> ▶ From the Locations list, select a location. ▶ Click Delete. System response The system displays the Delete Confirmation dialog box.
4	Click Yes to confirm the delete.
5	Click Exit . System Response The system returns to the Partner Editor dialog box.

Using Documents

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Introduction

In this chapter

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

- creating and editing documents
- managing documents
- routing documents

EDI documents

Gentran:Server tracks the relationship between an EDI document and the corresponding application data. For import processing, the system makes a persistent copy of the application data at the start of processing. For inbound (export) processing, the system assigns a unique identifier to the document, which is then permeated throughout the system for all database entries associated with the received document.

References

For additional information, see the following:

- *Importing Documents* on page 4 - 64
- *Exporting Documents* on page 4 - 66
- *Using Tracking*, chapter 9 in this guide

Document Editor

The Document Editor feature is the Gentran:Server data entry tool. It 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.

Document Browsers

Accessing the Document Browsers

Introduction

You can access document browsers in Gentran:Server in one of three ways:

- **The Desk** gives you access to 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 system displays the appropriate summary dialog box for that browser.

The summary dialog box displays the number of each type of document for each partner contained in the appropriate 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.

Browser columns

The following lists the columns displayed in all browsers:

Part	Function
Partner	Identifies the trading partner.
Type	Identifies the specific type of EDI document. Example 810 identifies an invoice.
Name	Displays the user-assigned name of the document.
Status	The allowable status depends on the browser. Reference See the Glossary for more information about status values. (Continued on next page)

Part	Function
RefData	Displays the reference data assigned by the translation object designer to identify this document: <ul style="list-style-type: none"> ▶ Segment/element positional value (such as a PO Number for a purchase order) ▶ Blank (no reference data is assigned)

Note

In the browsers, you can click a column heading to sort the display by that values in that column.

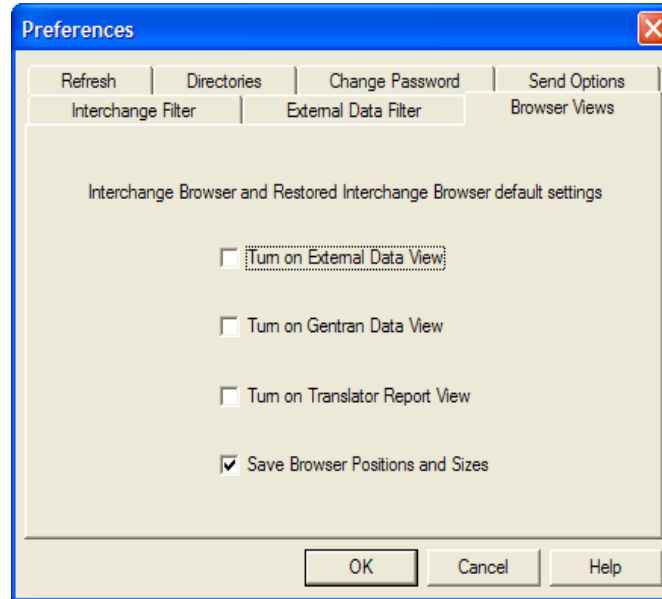
Procedure To access any of the document browsers, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select the browser. System Response The system displays the appropriate summary dialog box for that browser.
2	Select the type of document for the appropriate partner. Notes <ul style="list-style-type: none"> ▶ To highlight more than one partner/document type combination, click on the first partner/document type and then press SHIFT and click the last partner/document type in the group. ▶ To highlight several partner/document types that are not adjacent to each other in the summary dialog box, press CTRL and click the partner/document types.
3	Click View . System response The system displays the browser containing those documents.

Browser Page Size and Position Preferences

By default, Gentran:Server maintains your current page sizes and positions after you have changed them. You can reset your browser window sizes and positions to the default.

Diagram The following illustrates the Preference dialog box:



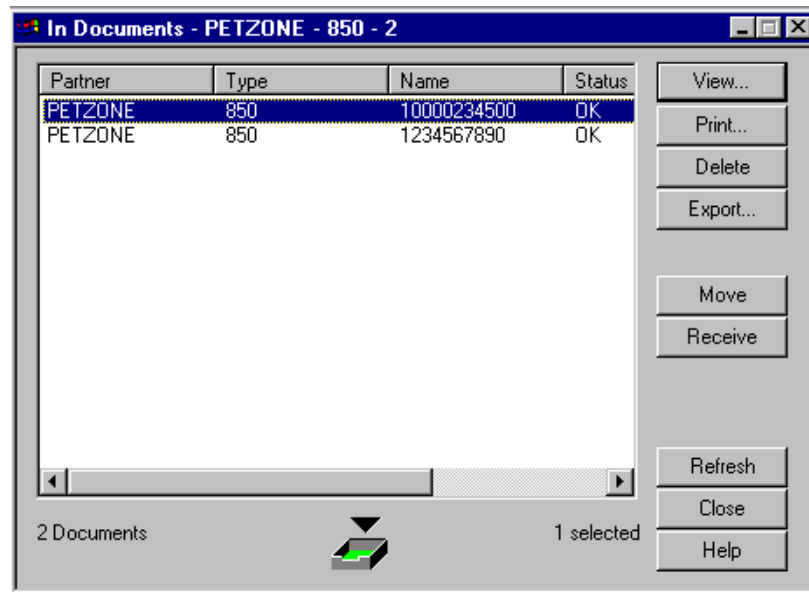
Procedure To access Preference dialog box and result the default views, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select the Options > Browser Views . System Response The system displays the dialog box.
2	To reset the default view, deselect the Save All Browser Positions and Sizes check box.
3	Click OK . System response The system displays the browser containing those documents.

In Documents Browser

Introduction The In Documents browser contains a list of documents that the system received but that have not yet been processed by the user. After the documents are processed (printed or exported) the documents are transferred to the In Drawer.

Diagram The following illustrates the In Documents browser:



Parts and functions The following lists the parts of the In Documents browser and their functions:

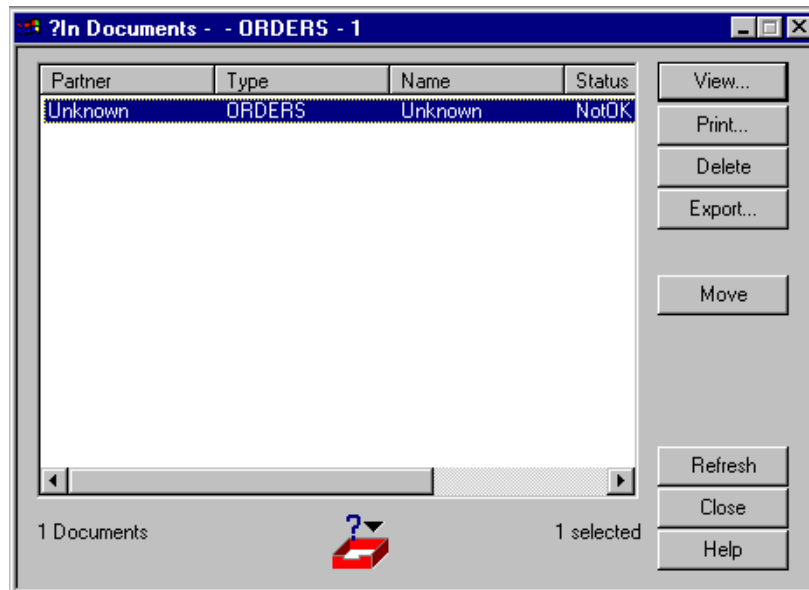
Part	Function
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document. Note If a document is waiting for acknowledgement processing (acknowledgement generation or reconciliation), you can not delete it until this processing is complete. (Continued on next page)

Part	Function
Export	Accesses the Select Export Method Dialog Box, which allows you to export the selected document
Move	Moves the selected document to the In Drawer.
Receive	Accesses the Communication Session dialog, which allows you to begin a receive-only session.
Refresh	Refreshes the display of the browser.
Close	Closes the browser.
Help	Displays Online Help.

?In Documents Browser

Introduction The ?In Documents browser contains a list of documents that the system received but failed compliance checking or do not have an identifiable partner or transaction set.

Diagram The following illustrates the ?In Documents browser:



Parts and functions The following lists the parts of the ?In Documents browser and their functions:

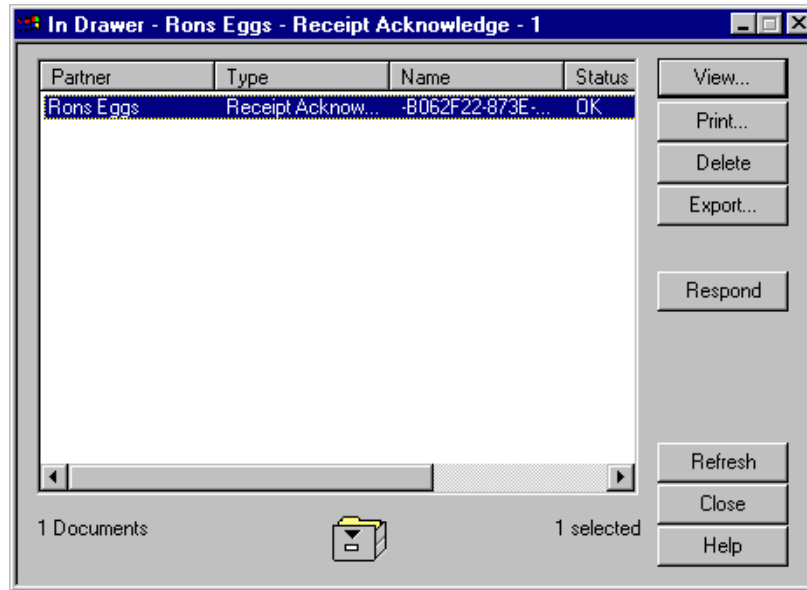
Part	Function
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document. Note If a document is waiting for acknowledgement processing (acknowledgement generation or reconciliation), you may not delete it until this processing is complete. (Continued on next page)

Part	Function
Export	Accesses the Select Export Method Dialog Box, which allows you to export the selected document
Move	Moves the selected document to the In Drawer.
Refresh	Refreshes the display of the browser.
Close	Closes the browser.
Help	Displays Online Help.

In Drawer Browser

Introduction The In Drawer browser contains a list of documents that the system received and processed.

Diagram The following illustrates the In Drawer browser:



Parts and functions The following lists the parts of the In Drawer browser and their functions:

Part	Function
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Accesses the Select Export Method Dialog Box, which allows you to export the selected document.

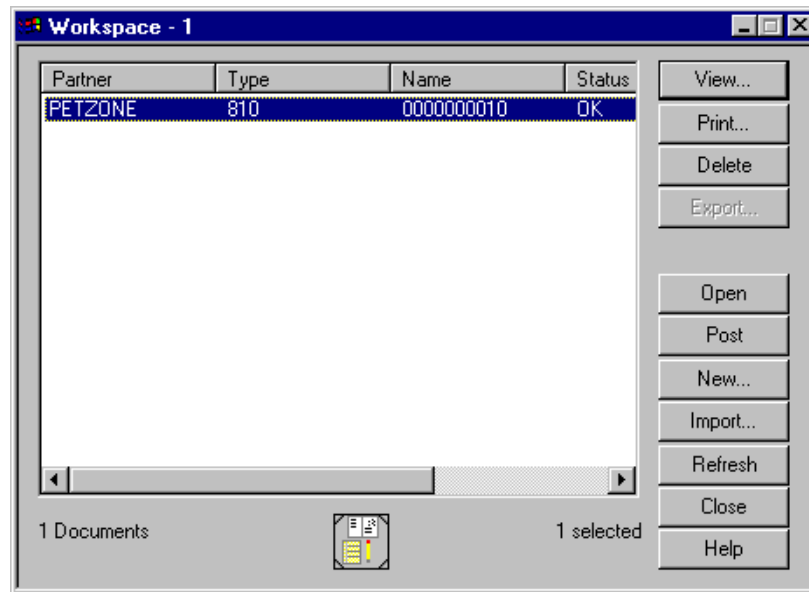
(Continued on next page)

Part	Function
Respond	Creates a turnaround document in response to the selected document or documents. Note The Respond function is only valid when one or more documents are selected and Turn Around translation objects exist for the selected documents. Reference See <i>Inbound Translation Object Dialog Box</i> on page 3 - 15 for more information.
Refresh	Refreshes the display of the browser.
Close	Closes the browser.
Help	Displays Online Help.

Workspace Browser

Introduction The Workspace browser contains a list of documents that the system received but that have not yet been processed by the user. After the documents are processed (printed or exported) the documents are transferred to the In Drawer.

Diagram The following illustrates the Workspace browser:



Parts and functions The following lists the parts of the Workspace browser and their functions:

Part	Function
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Not a valid function for this browser.
Open	Accesses the Document Editor facility, which allows you to edit the selected document.

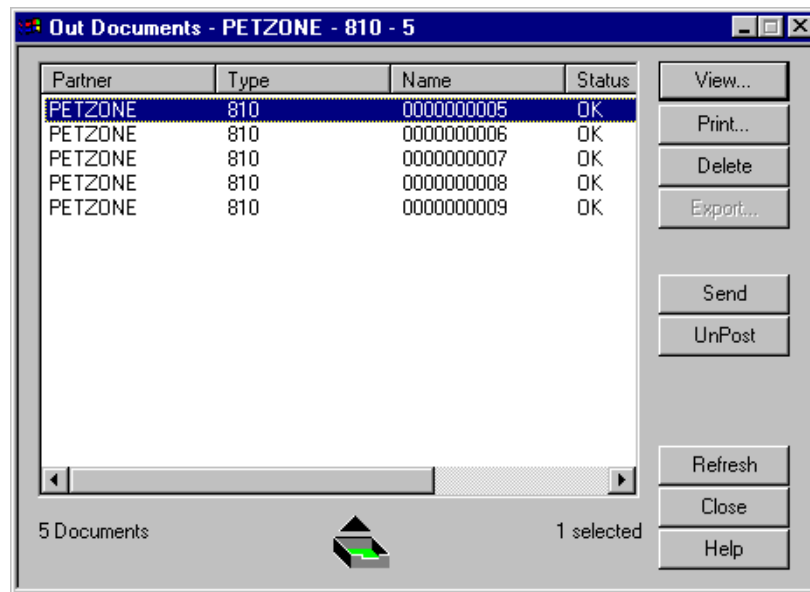
(Continued on next page)

Part	Function
Post	<p>Moves the selected compliant document to the Out Documents Browser.</p> <p>Note Post documents to the Out Documents before sending them.</p>
New	<p>Accesses the Create New Document dialog box, which allows you to select a partner/transaction set combination for which you want to enter a new document using the Document Editor facility.</p> <p>Note The Document Editor uses the associated screen entry translation object to allow information to be entered into the system.</p> <p>Reference See <i>Creating an Outbound Relationship</i> on page 3 - 66 for more information.</p>
Import	<p>Accesses the Application Files to Import Dialog Box, which allows you to import data from an external application file.</p> <p>Note Depending on the content of the file, the system may prompt you for partner, transaction, or translation object information. The Import function does not affect any selected documents.</p>
Refresh	Refreshes the browser display.
Close	Closes the browser.
Help	Displays Online Help.

Out Documents Browser

Introduction The Out Documents browser contains a list of documents that are ready to be sent. After the documents are successfully sent, they are automatically transferred to the Out Drawer.

Diagram The following illustrates the Out Documents browser:



Parts and functions The following lists the parts of the Out Documents browser and their functions:

Part	Function
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Not a valid function from this browser.

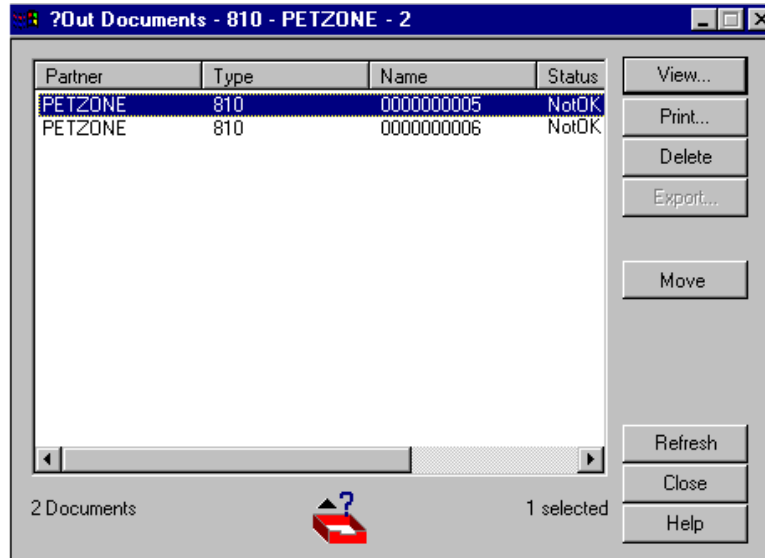
(Continued on next page)

Part	Function
Send	<p>Accesses the Send/Receive dialog box, which enables you to manually start a communications session to send data.</p> <p>Notes</p> <ul style="list-style-type: none"> ▶ Only selected documents will be enveloped and sent. If no documents are selected then <i>all</i> documents will be sent. Successfully sent documents will be moved to the Out Drawer. ▶ Initiating a Send session also prompts the system to receive any documents that are waiting to be received. ▶ The Send function is <i>only</i> valid if Out Documents is the currently selected browser and documents are present or if interchanges in the Interchanges browser have a Ready status.
UnPost	Moves the selected document back to the Workspace browser.
Refresh	Refreshes the display of the browser.
Close	Closes the browser.
Help	Displays Online Help.

?Out Documents Browser

Introduction The ?Out Documents browser contains a list of documents that were imported into the system but are invalid.

Diagram The following illustrates the ?Out Documents browser:



Parts and functions

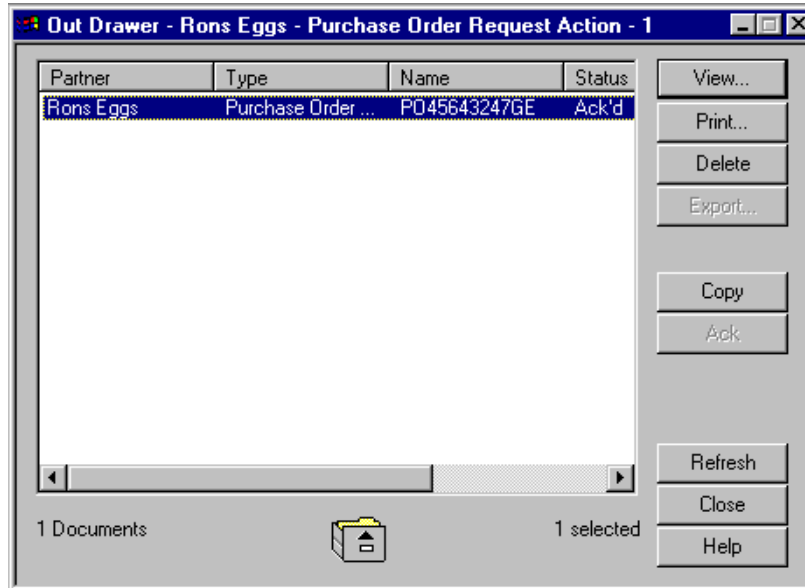
The following lists the parts of the ?Out Documents browser and their functions:

Part	Function
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Not a valid function from this browser.
Move	Moves the selected document to the In Drawer.
Refresh	Refreshes the browser display.
Close	Closes the browser.
Help	Displays Online Help.

Out Drawer Browser

Introduction The Out Drawer browser contains a list of documents that the system successfully sent.

Diagram The following illustrates the Out Drawer browser:



Parts and functions The following lists the parts of the Out Drawer browser and their functions:

Part	Function
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Not a valid function from this browser.
Copy	Copies the selected documents to the Workspace. Note This function enables you to reprocess and resend documents that were already sent by the system. (Continued on next page)

Part	Function
Ack	Changes the status of the selected documents to Acknowledged.
Refresh	Refreshes the browser display.
Close	Closes the browser.
Help	Displays Online Help.

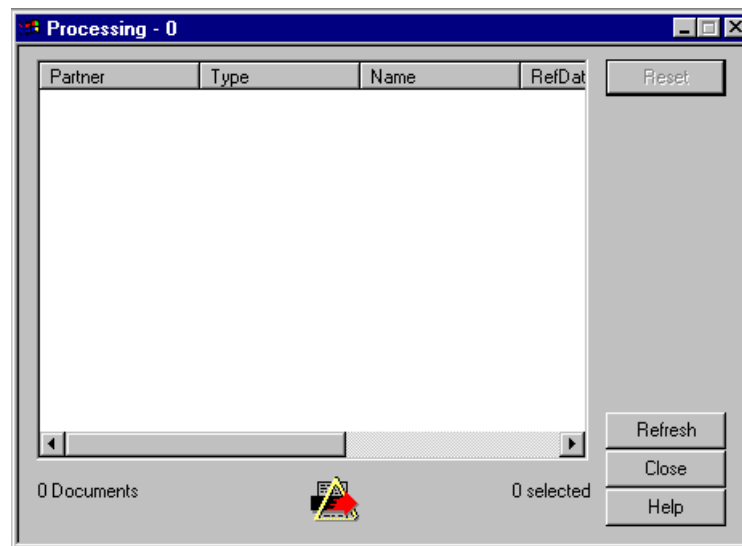
Processing Browser

Introduction The Processing browser contains a list of documents that the system is currently processing.

Note

The Processing browser displays the current status of the processing document. If the document is processing, the status code is set to **1**. If the document or acknowledgement is deferred, the status code is set to **2**.

Diagram The following illustrates the Processing browser:



Parts and functions The following lists the parts of the Processing browser and their functions:

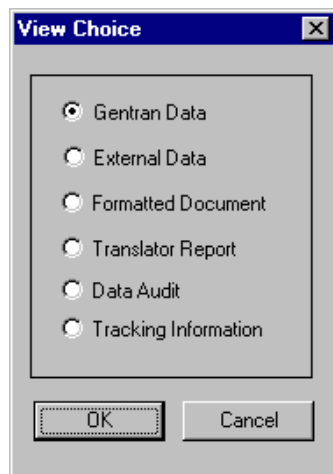
Part	Function
Reset	Returns to their previous location any documents that are displayed on this dialog box but for which processing has terminated. Note This function is typically used for exception cases when the processing of a document terminated improperly.
Refresh	Refreshes the browser display.
Close	Closes the browser.
Help	Displays Online Help.

Related Dialog Boxes

View Choice Dialog Box

Introduction The View Choice dialog box enables you to specify how you want to view the selected document.

Diagram The following illustrates the View Choice dialog box:



Parts and functions The following lists the parts of the View Choice dialog box and their functions. You can select only one of these options.

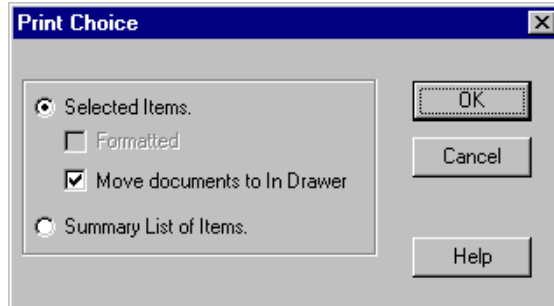
Part	Function
Gentran Data	Displays the raw EDI data.
External Data	Displays the data file used in translation. Note This option is not available if the external data file used in translation does not exist.
Formatted Document	Displays the data in the Document Editor using a screen entry translation object. Note This option is not available if no screen entry translation object exists for the document. (Continued on next page)

Part	Function
Translator Report	<p>Displays a report of the actions the translator took on this document and lists any EDI- or translation object-based compliance errors.</p> <p>Reference See Error Messages in the <i>Administration Guide</i> for more information about translator reports.</p>
Data Audit	<p>Displays the document tracking information that is available for a single document.</p> <p>Note This function is not available if document level auditing is disabled.</p>
Tracking Information	Displays information that tracks an external data file.
OK	Executes the selected function; exits the dialog box.
Cancel	Exits the dialog box.

Print Choice Dialog Box

Introduction The Print Choice dialog box enables you to specify whether you want to print the selected item (document or translation object) or a summary list of all items in the browser.

Diagram The following illustrates the Print Choice dialog box:



Parts and functions

The following lists the parts of the Print Choice dialog box and their functions:

Part	Function
Selected Items	Tells the system to perform the selected items or items (the following two fields).
Formatted	Tells the system to print the items as formatted (using the appropriate translation object). Note This option is unavailable when printing a translation object (always formatted) or when a print translation object does not exist for the item.
Move documents to In Drawer	Tells the system to move the document to the In Drawer. Note This option is only available for the In Documents and ?In Documents browsers.
Summary List of Items	Tells the system to print a summary list of the items selected in the browser.
OK	Executes the selected function; exits the dialog box.
Cancel	Exits the dialog box.
Help	Accesses Online Help.

Select Export Method Dialog Box

Introduction The Select Export Method dialog box enables you to write documents to an external file for processing by another application.

Notes

- There must be a system export translation object for the document or a partner-specific export translation object for the document.
- The Export function is only valid when one or more documents are selected from one of the following browsers: In Documents, In Drawer, or ?In Documents.

Diagram The following illustrates the Select Export Method dialog box:



Parts and functions The following lists the parts of the Select Export Method dialog box and their functions. You can select only one of these options.

Part	Function
Export to Single File	Converts all selected documents to data and accesses the Choose File to Export Document Dialog Box to write them to a single file.
Export to Default Files	Writes selected documents to the files set up in the partner inbound relationship. Reference See <i>Inbound Translation Object Dialog Box</i> on page 3 - 15 for more information about designating the export file.
Select File by Document	Accesses the Choose File to Export Document Dialog Box, which enables you to rename selected documents to be exported.
OK	Executes the selected function; exits the dialog box. (Continued on next page)

Part	Function
Cancel	Exits the dialog box.
Help	Accesses Online Help.

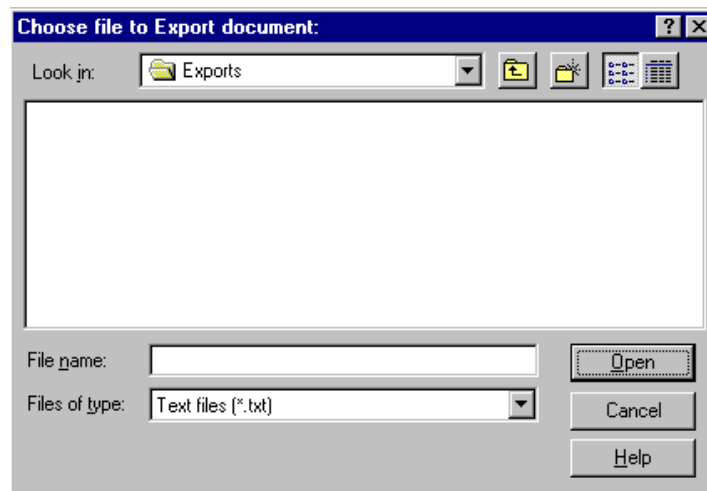
Choose File to Export Document Dialog Box

Introduction The Choose File to Export Document dialog box enables you to specify the name of the file to which the system exports the selected document.

Notes

- There must be a system export translation object for the document or a partner-specific export translation object for the document.
- The Export function is only valid when one or more documents are selected from one of the following browsers: In Documents, In Drawer, or ?In Documents.

Diagram The following illustrates the Choose File to Export Document dialog box:



Parts and functions The following lists the parts of the Choose File to Export Document dialog box and their functions:

Part	Function
Look in	Select the folder where the system should look for the file. Displays the current.
File name	Specify the name of the export file.
Files of type	Select the type of file.
Open	Executes the selected function; exits the dialog box.
Cancel	Exits the dialog box.
Help	Accesses Online Help.

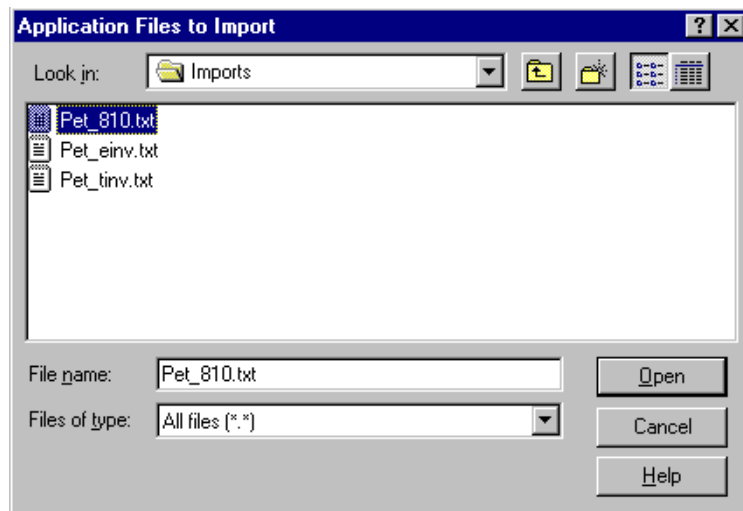
Application Files to Import Dialog Box

Introduction The Application Files to Import dialog box enables you to import data from an external application file.

Note

Depending on the content of the file, the system may prompt you for partner, transaction, or translation object information. The Import function does not affect any documents that may be selected.

Diagram The following illustrates the Application Files to Import dialog box:



Parts and functions The following lists the parts of the Application Files to Import dialog box and their functions:

Part	Function
Look in	Select the folder where the system should look for the file. Displays the current.
File name	Specify the name of the export file.
Files of type	Select the type of file.
Open	Executes the selected function; exits the dialog box.
Cancel	Exits the dialog box.
Help	Accesses Online Help.

Document Search Dialog Box

Introduction The Document Search dialog box enables you to specify criteria for which Gentran:Server performs a system-wide search. This enables you to quickly access a subset of documents without searching each browser manually.

Diagram The following illustrates the Document Search dialog box:

Parts and functions The following lists the document search criteria and their descriptions:

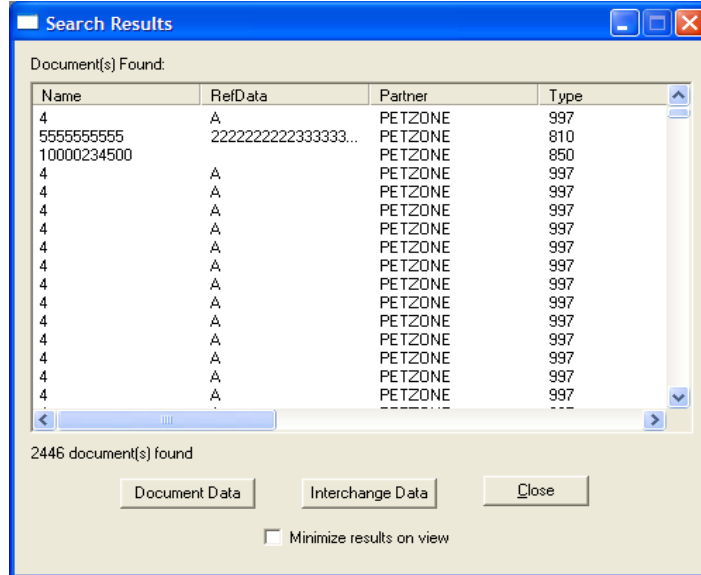
Function	Description
Document Name	Searches for documents with the specified user-assigned document name.
RefData	Searches for documents with the specified reference data (assigned by the translation object designer).
Partner	Searches for documents with the selected partner ID (identifies the partner for/from whom the document was generated or received).

(Continued on next page)

Function	Description
Document Type	Searches for documents of the specified EDI type. Example 810 identifies an invoice.
Application Field 1	Searches for documents with the specified value in Application Field 1.
Application Field 2	Searches for documents with the specified value in Application Field 2.
Application Field 3	Searches for documents with the specified value in Application Field 3.
Application Field 4	Searches for documents with the specified value in Application Field 4.
Application Field 5	Searches for documents with the specified value in Application Field 5.
Application Field 6	Searches for documents with the specified value in Application Field 6.

Search Results Dialog Box

After you enter criteria and click Search, the system displays the Search Results dialog box as shown below:



Parts and functions

The following lists the search results functions and their descriptions:

Function	Description
Document Data	<p>Displays data for a document. To display data for the document, select the document from the list and click Document Data.</p> <p>Note:</p> <p>You can also use this function by right-clicking the document and selecting Document Data.</p>
Interchange Data	<p>Opens the Interchange Browser and displays interchange data for the document. To display for interchange data for the document, select the document from the list and either click Interchange Data.</p> <p>Note:</p> <p>You can also use this function by right-clicking the document and selecting Interchange Data.</p> <p>(Continued on next page)</p>

Function	Description
Minimize results on view	Minimizes the Search Results dialog box when viewing data, tracking information, or an interchange. To minimize results, select the check box.
Double-click	Displays the tracking information for the document. To display information, select an item and then double-click.

Filter Dialog Box

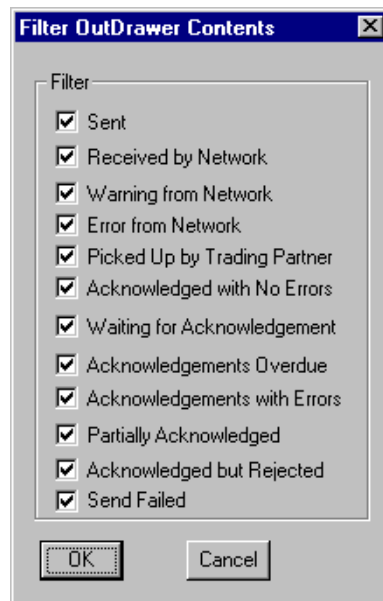
Introduction The Filter function can be used when the Out Drawer is active to filter the display of documents by status.

If you want to filter the display of documents in the Out Drawer by the document status you can choose *not* to display documents with a certain status by selecting the check box next to each status that you do *not* want displayed.

Note

When you clear a check box, the display of that status is turned “off.” The default is to display documents regardless of status.

Diagram The following illustrates the Filter dialog box:



Parts and functions

The following lists the filter criteria and their descriptions:

Part	Function
Sent	Filters for documents that were successfully transmitted.
Received by Network	Filters for documents that were successfully delivered to a Value Added Network (VAN).
Warning from Network	Filters for documents that were delivered to a VAN, which detected non-critical errors in the data.

(Continued on next page)

Part	Function
Error from Network	Filters for documents that were delivered to a VAN, which detected critical errors in the data.
Picked up by Trading Partner	Filters for documents that were successfully delivered to a trading partner through a VAN.
Acknowledged with No Errors	Filters for documents that were acknowledged by your partner with no errors.
Waiting for Acknowledgement	Filters for documents that are waiting to be reconciled with an inbound functional acknowledgement.
Acknowledgements Overdue	Filters for documents that are waiting to be reconciled with an inbound functional acknowledgement but have exceeded the number of hours by which the acknowledgement is deemed late.
Acknowledgements with Errors	Filters for documents that were acknowledged by your partner with errors. These documents were accepted by your partner in spite of the errors.
Partially Acknowledged	Filters for documents that were partially acknowledged. Note If your partner is going to issue partial acknowledgements at the interchange or group level, they should also indicate acceptance or rejection at the transaction level.
Acknowledged but Rejected	Filters for documents that were acknowledged by your partner with errors. These documents were rejected by your partner.
Send Failed	Filters for documents for which the send transmission failed.

Creating and Editing Documents

Creating Documents

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.

References

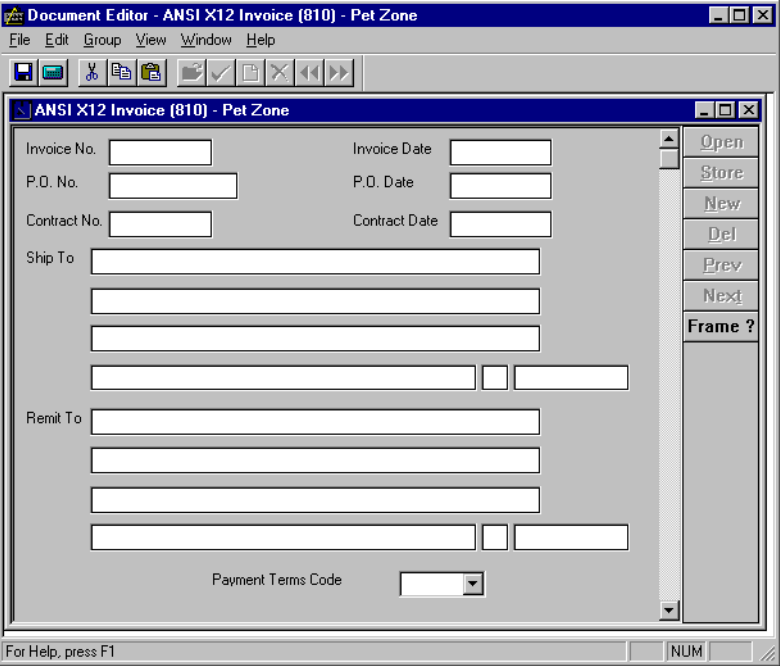
For additional information, see the following:

- *Registering New Translation Objects* on page 2 - 7
- *Creating an Outbound Relationship* on page 3 - 66
- *Gentran:Server Online Help (Document Editor)*

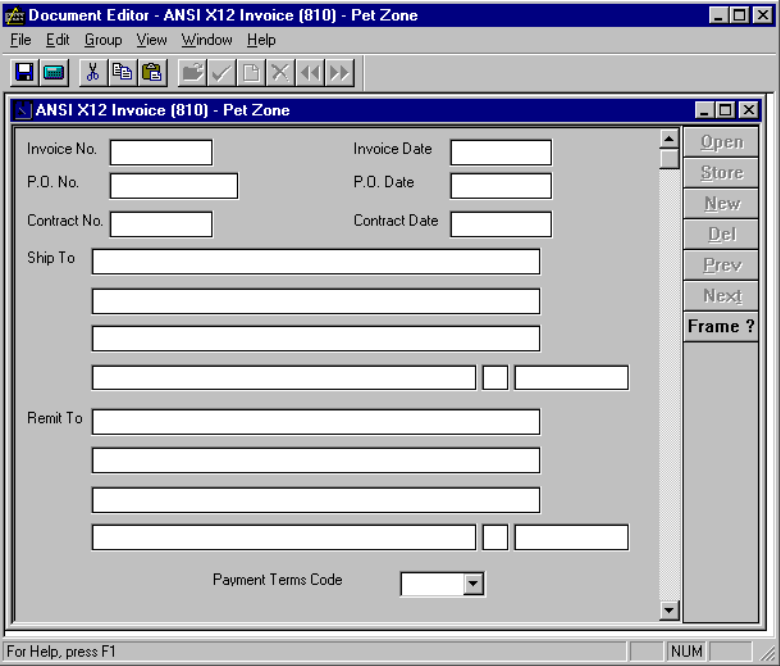
Procedure

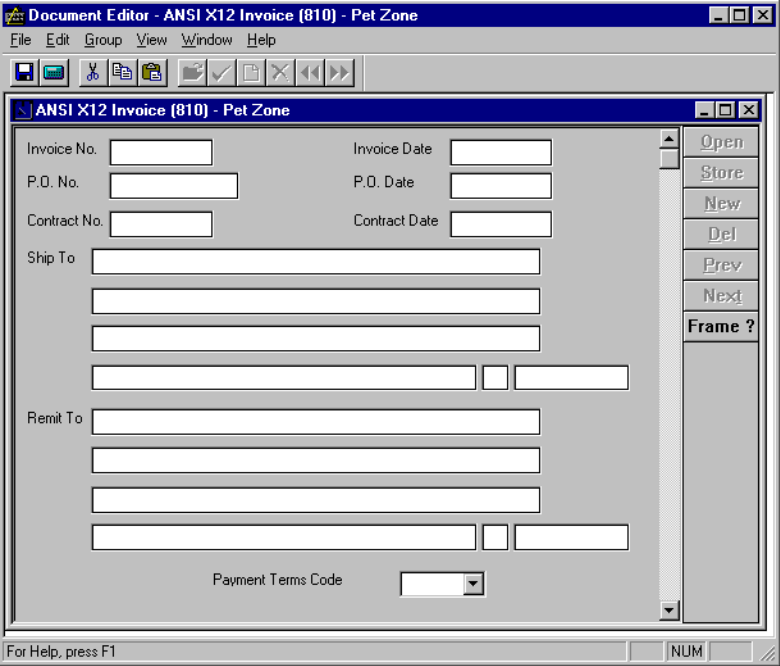
To create a document, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select Workspace . System Response The system displays the Workspace Browser.
2	Click New . System response The system displays the Create New Document dialog box. (Continued on next page)

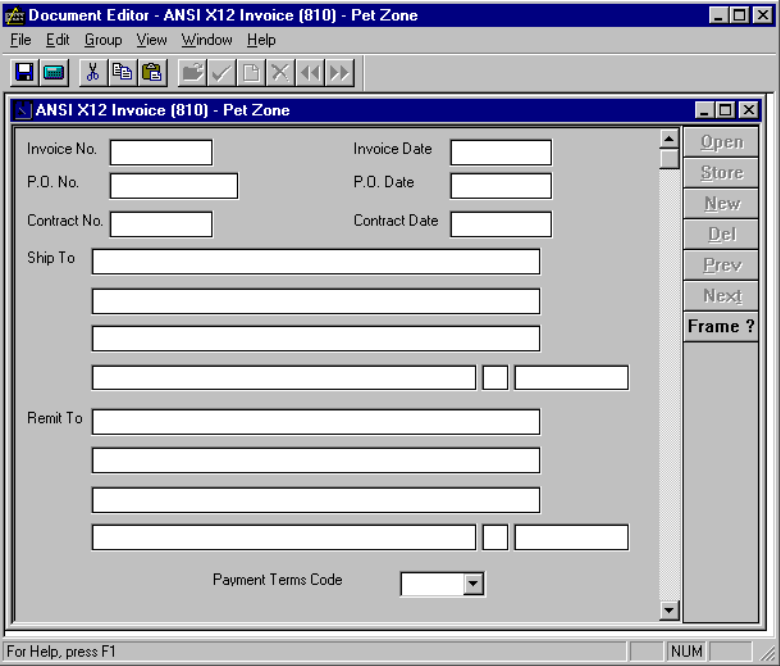
Step	Action
3	<p>Select the appropriate partner/transaction set combination from the list and click OK.</p> <p>System response The system displays the translation object for the selected combination, as shown below:</p>  <p>(Continued on next page)</p>

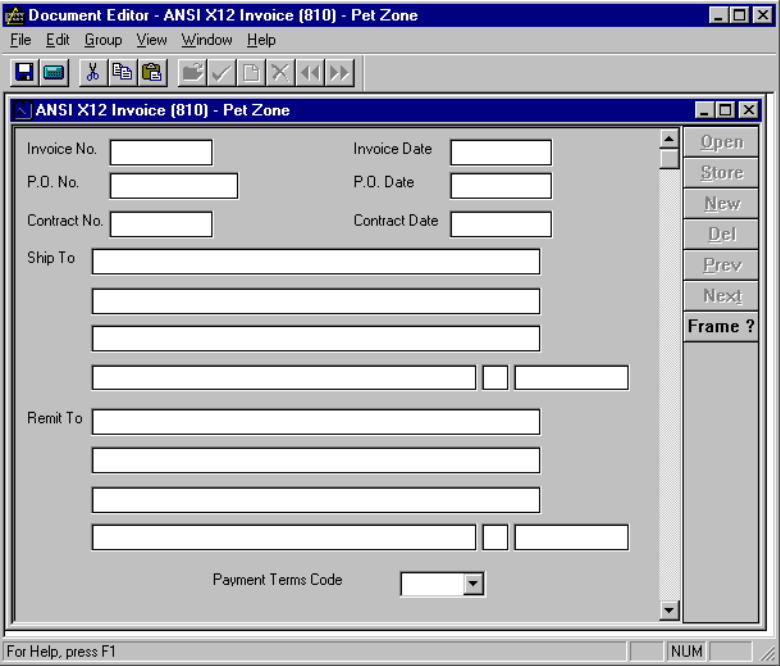


Step	Action
3	<p>Select the appropriate partner/transaction set combination from the list and click OK.</p> <p>System response The system displays the translation object for the selected combination, as shown below:</p>  <p>(Continued on next page)</p>

Step	Action
3	<p>Select the appropriate partner/transaction set combination from the list and click OK.</p> <p>System response The system displays the translation object for the selected combination, as shown below:</p>  <p>(Continued on next page)</p>



Step	Action
3	<p>Select the appropriate partner/transaction set combination from the list and click OK.</p> <p>System response The system displays the translation object for the selected combination, as shown below:</p>  <p>(Continued on next page)</p>

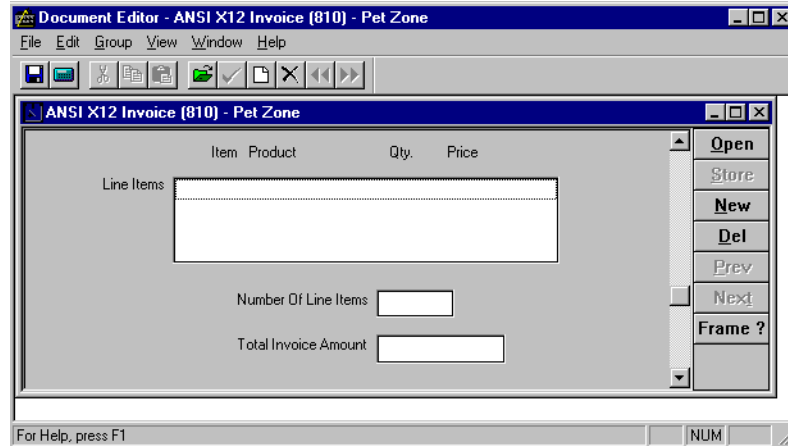
Step	Action
3	<p>Select the appropriate partner/transaction set combination from the list and click OK.</p> <p>System response The system displays the translation object for the selected combination, as shown below:</p>  <p>(Continued on next page)</p>



- 4 Type all the required data items into the boxes on the document translation object.

Note

If the document contains a looping structure (lower-level detail records such as line items), the input translation object contains a list, as shown below:



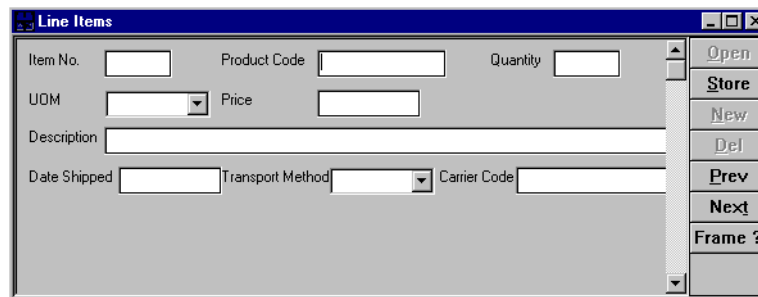
Step

To access items in a list, highlight the first entry and click **New**.

Action

System response

The system displays the list box, as shown below:



- 6 Enter the data for the item.

Notes

- To enter a second or subsequent item, click **Next** or press **ALT + T**.
- After all loop items are entered, click **Store** to save and exit the loop dialog box.
- If the document contains codes, press **SHIFT + F1** from each code field to access a list of the codes.

(Continued on next page)

Step	Action
7	<p>If the document contains calculated fields, select Recalculate from the File menu before saving the document.</p> <p>System response The system updates the totals and checks the document for errors.</p>
8	<p>When you are finished entering data, select Save from the File menu.</p> <p>System response 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>From the File menu, select Exit.</p> <p>System response You exit the Document Editor. The system prompts you to save the document before closing.</p> <p>Note You can now open and edit this document from the Workspace Browser.</p>

Opening and Editing Documents

Introduction To edit a document using the Document Editor, you need to set up the system to support screen entry for the partner/transaction set combination you want to edit.

Note

The appropriate Screen Entry translation object must be loaded and a corresponding outbound relationship must be set up for the partner.

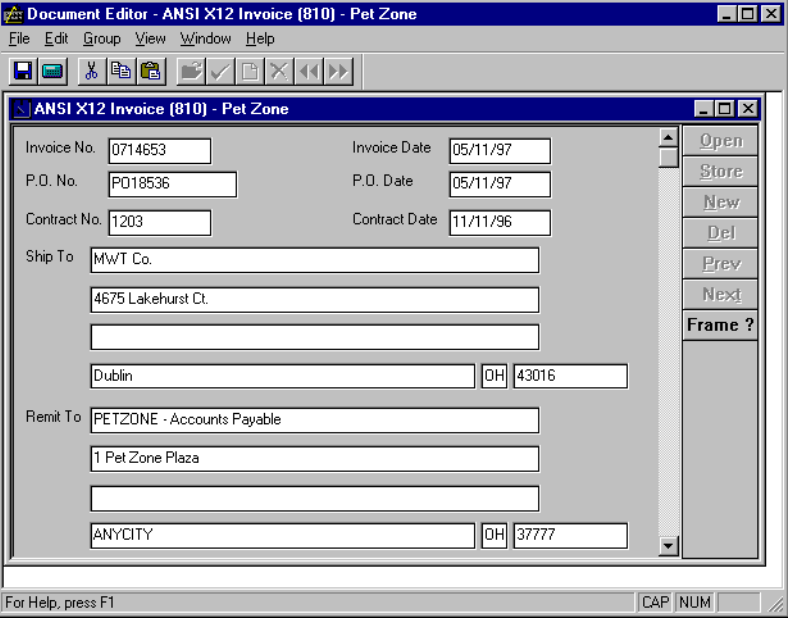
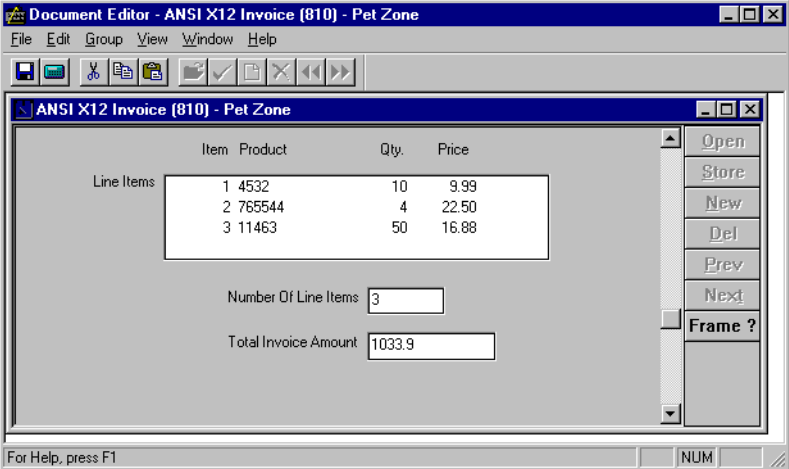
References

For additional information, see the following:

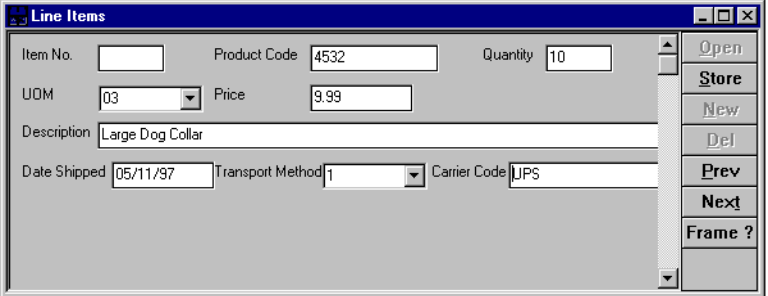
- *Registering New Translation Objects* on page 2 - 7
- *Creating an Outbound Relationship* on page 3 - 66
- *Gentran:Server Online Help (Document Editor)*

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

Step	Action
1	<p>From the appropriate area of The Desk, select Workspace.</p> <p>System Response The system displays the Workspace Browser.</p>
2	<p>Select the desired document from the Workspace.</p> <p>Note <i>Only</i> documents in the Workspace can be edited.</p> <ul style="list-style-type: none"> • 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 Documents</i> on page 4 - 61). • 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 - 59). <p style="text-align: right;">(Continued on next page)</p>

Step	Action																				
<p>3</p>	<p>Click Open.</p> <p>System response The system displays the document in the Document Editor facility, as shown below:</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"> Invoice No.: 0714653 Invoice Date: 05/11/97 P.O. No.: PO18536 P.O. Date: 05/11/97 Contract No.: 1203 Contract Date: 11/11/96 Ship To: MWT Co., 4675 Lakehurst Ct., Dublin, OH 43016 Remit To: PETZONE - Accounts Payable, 1 Pet Zone Plaza, ANYCITY, OH 37777 <p>Navigation buttons on the right include Open, Store, New, Del, Prev, Next, and Frame ?. The status bar at the bottom says "For Help, press F1" and "CAP NUM".</p>																				
<p>4</p>	<p>Modify the data as required.</p> <p>Note If the document contains a looping structure (lower-level detail records such as line items), the input translation object contains a list, as shown below:</p>  <p>The screenshot shows a window titled "Document Editor - ANSI X12 Invoice (810) - Pet Zone". The window displays a table of line items:</p> <table border="1" data-bbox="771 1486 1154 1608"> <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). Navigation buttons on the right include Open, Store, New, Del, Prev, Next, and Frame ?. The status bar at the bottom says "For Help, press F1" and "NUM".</p> <p>(Continued on next page)</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																	



Step	Action
5	<ul style="list-style-type: none"> ▶ To add a new line item, highlight the first entry and click New. ▶ To access items in the list, highlight the entry to be changed and click Open (or double-click the item). <p>System response The system displays the list item details, as shown below:</p> 
6	<p>You can now change or enter the data for the item.</p> <p>Notes</p> <ul style="list-style-type: none"> ▶ To move through the entries, use Next and Prev. ▶ To enter a second or subsequent item, click Next or press ALT + T. ▶ After all loop items are entered, click Store to save and exit the loop dialog box. ▶ If the document contains codes, press SHIFT + F1 from each code field to access a list of the codes.
7	<p>If the document contains calculated fields, select Recalculate from the File menu before saving the document.</p> <p>System response The system updates the totals and checks the document for errors.</p>
8	<p>When you are finished entering data, select Save from the File menu.</p> <p>System response The system saves the information and automatically recalculates and checks for errors. If errors are found, you are prompted to view the errors.</p>
9	<p>From the File menu, select Exit.</p> <p>System response The system prompts you to save the document before closing.</p>

Managing Documents

Viewing Documents

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:

- Raw input data
- External data
- EDI-formatted data
- Translator report
- Data audit
- Tracking information

Notes

- The formatted view option is only active if a Screen Entry translation object is available in the Partner Relationship record.
- The external data option is only active if the data file used in translation is available.
- When viewing raw input or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.

Using the View function

The View function can be accessed using either of the following methods:

- A document browser 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

See *Viewing Documents within Interchanges* on page 7 - 14 for information about the Interchanges browser.

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 appropriate area of The Desk, select one of the document browsers.</p> <p>System Response The system displays the appropriate summary dialog box for that browser.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
2	<p>Select the type of document for the appropriate partner and click View.</p> <p>System Response The system displays the browser containing those documents.</p>
3	<p>Select a single document from the appropriate browser.</p>
4	<p>Click View.</p> <p>System Response The system displays the View Choice Dialog Box.</p>
5	<p>Select an option to display the input data:</p> <ul style="list-style-type: none"> ▶ To display raw EDI data, select Gentran Data. ▶ To display the data file used in translation, select External Data. <p>Note This option is not available if the external data file used in translation does not exist.</p> <ul style="list-style-type: none"> ▶ To display the data in the Document Editor using a screen entry translation object, select Formatted Document. <p>Note This option is not available if no screen entry translation object exists for the document.</p> <ul style="list-style-type: none"> ▶ To display a report of the actions the translator took on this document and list any EDI- or translation object-based compliance errors, select Translator Report. <p>Reference See Error Messages in the <i>Administration Guide</i> for more information about translator reports.</p> <ul style="list-style-type: none"> ▶ To display the document tracking information available for a single document, select Data Audit. <p>Note This function is not available if document level auditing is disabled.</p> <ul style="list-style-type: none"> ▶ To display information that tracks an external data file, select Track Information.
6	<p>Click OK to access the view that you specified.</p>

Viewing a Document from the Interchange Browser

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

Step	Action
1	From the appropriate area of The Desk, select the Interchanges browser.
2	Select a single document.
3	<p>Click the Data icon on the Toolbar.</p> <p>System response The system displays the raw EDI data view of the Interchange (displayed in the Data View window on the Interchanges or Restored Interchanges browser).</p> <p>Note When viewing raw input or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.</p>

Viewing Currently Processing Documents

Processing browser The Processing Browser displays any document that is currently being processed in the Gentran:Server system. This browser enables you to ascertain which documents are currently being processed by you or other users in the Gentran:Server system.

Note

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

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

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

Step	Action
1	From the View menu, select Processing . System Response The system displays the Processing Browser.
2	You can view the currently processing documents or perform the function listed in this table. Note You can use the Reset function to return to their previous location documents that are displayed in the Processing browser but for which processing has terminated. This is typically done when the processing of a document terminated improperly.

Finding Specific Text in a Document

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

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
- External Data-View of an Interchange
- External Data-View of a Document

Procedure To find specific text, complete the following steps:

Step	Action	
1	Access one of the following data-view windows. Note When viewing raw input or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.	
	To display this window...	Do the following:
	Audit Log	Select Audit Log from the View menu.
	Document Tracking	1. Select a document in a browser. 2. Select View from the Commands menu. 3. Click the Tracking information option. 4. Click OK .
	Interchange Tracking	1. Select an interchange in the Interchanges browser. 2. Select View from the Commands menu. 3. Click the Tracking information option. 4. Click OK .

(Continued on next page)

Step	Action	
1 (contd)	To display this window...	Do the following:
	Raw Data View of an Interchange	<ol style="list-style-type: none"> 1. Select Interchanges from the appropriate area of the The Desk. 2. Select an interchange from the Interchanges browser. 3. Selecting Interchanges from the View menu. 4. Selecting Data from the Interchanges cascading menu.
	Raw Data View of a Document	<ol style="list-style-type: none"> 1. Select a document in the Interchanges browser. 2. Select View from the Commands menu. 3. Click OK on the View Choice dialog box.
	External Data View of an Interchange	<ol style="list-style-type: none"> 1. Select Interchanges from the appropriate area of the The Desk. 2. Select an interchange from the Interchanges browser. 3. Select Interchanges from the View menu. 4. Select External Data from the Interchanges cascading menu.
	External Data View of a Document	<ol style="list-style-type: none"> 1. Select a document in the Interchanges browser. 2. Select View from the Commands menu. 3. Select External Data and click OK on the View Choice dialog box.
4	From the Edit menu, select Find . System response The system displays the Find dialog box.	
5	In the Find what box, type the text you want to locate.	
6	Do you want the system to search for case-sensitive text? <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the Match Case check box and continue with step 7. ▶ If <i>no</i>, continue with step 7. <p style="text-align: right;">(Continued on next page)</p>	

Step	Action
7	<p>Click Find Next to find the first occurrence of the specified text.</p> <p>Notes</p> <ul style="list-style-type: none">▶ If the system locates that text, it is highlighted in the data-view window.▶ If the system does not find the specified text, the system beeps. If this is the case, skip to step 7.
8	Continue clicking Find Next to find each subsequent occurrence of that text.
9	<p>Click Cancel.</p> <p>System response The system returns to the data-view window.</p>

Searching for Documents

Introduction The Document Search facility enables you to quickly and easily locate specific documents in the system. This facility returns the available tracking information for each matching document.

Procedure To search for documents, complete the following steps:

Step	Action
1	From the Commands menu, select Document Search . System response The system displays the Document Search Dialog Box.
2	Enter the appropriate criteria.
3	Click Search . System response The system displays the tracking data for each document it locates that matches the criteria you specified.
4	Double-click a document to display the associated tracking information.

Sorting Documents

Procedure To sort documents in any document browser or the Send Queue browser, click the appropriate column heading to sort by that values in that column.

Filtering Out Drawer Documents by Status

Introduction

When the Out Drawer Browser is active, you can use the Filter function to filter the display of documents by status.

Sorting with Out Drawer browser

To filter the document display in the Out Drawer browser, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select the Out Drawer. System response The system displays the Out Drawer Summary dialog box.
2	Select the type of document for the appropriate partner and click View . System response The system displays the Out Drawer Browser.
3	Click Filter . System response The system displays the Filter Dialog Box.
4	If you want to filter the display of documents in the Out Drawer by the document status, you can choose <i>not</i> to display documents with a certain status by selecting the check box next to each status that you do <i>not</i> want displayed. Note When you clear a check box, the display of that status is turned off. The default is to display documents regardless of status.
5	Click OK . System response The contents of the Out Drawer browser are filtered as specified.

Deleting Documents

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.
- Documents in the Send Queue can only be deleted from the Interchanges Browser.

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

Step	Action
1	From the appropriate area of The Desk, select the current location of the document by selecting the location. System response If you select one of the document browsers, the system displays the appropriate summary dialog box for that browser.
2	If the system displays a summary dialog box, select the type of document for the appropriate partner and click View . System response Access the browser containing those documents.
3	Click Delete . System response The system displays a confirmation dialog box.
4	Click Yes . System response The document is deleted.

Printing Documents

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 appropriate area of The Desk, select the current location of the document by selecting the location. System response If you select one of the document browsers, the system displays the appropriate summary dialog box for that browser.
2	Select the type of document for the appropriate partner and click View . System response The system displays the browser containing those documents.
3	Do you want to print a summary list of all documents? <ul style="list-style-type: none"> • If <i>yes</i>, click Print to access the Print dialog box. Continue with step 6. • If <i>no</i>, continue with step 4.
4	Do you want to print selected documents (either formatted or not) or a summary list of selected documents? <ul style="list-style-type: none"> • If <i>yes</i>, select a document or group of documents and click Print and continue with step 5. System response The system displays the Print Choice Dialog Box. <ul style="list-style-type: none"> • If <i>no</i>, continue with step 6. <div style="text-align: right;">(Continued on next page)</div>

Step	Action
5	<p>On the Print Choice Dialog Box, select one of the following options and click OK:</p> <ul style="list-style-type: none"> ▶ To print selected unformatted documents, select the Selected Items option. ▶ If you want the selected documents printed as formatted (a print translation object must exist for the documents to be printed as formatted), select the Selected Items option <i>and</i> the Formatted check box. ▶ If you are printing from the In Documents Browser or ?In Documents Browser, you can either move the document to the <i>In Drawer Browser</i> or leave the document in place. ▶ To print a summary list of selected documents, select the Summary List of Items option. <p>System response The system displays the Print dialog box.</p>
6	<p>On the Print dialog box, set the appropriate options and click OK.</p> <p>Note 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 Documents to the In Drawer

Introduction This function moves a selected document or group of documents to the In Drawer Browser. Documents are automatically moved from the In Documents Browser or ?In Documents Browser to the In Drawer Browser 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 Browser so that you could create a turnaround (response) document.

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

Step	Action
1	From the appropriate area of The Desk, select the In Documents Browser or ?In Documents Browser. System response The system displays the appropriate summary dialog box for that browser.
2	Select the type of document for the appropriate partner and click View . System response The system displays the browser containing those documents.
3	Select the documents that you want to move to the In Drawer Browser and click Move . System response The selected documents are moved to the In Drawer Browser.

Copying a Document (to Reprocess and Resend)

Introduction The Copy function copies a document (that was already sent successfully) to the Workspace Browser 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. See *Resending Documents* on page 5 - 9 for more information.

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

Step	Action
1	From the appropriate area of The Desk, select the Out Drawer. System response The system displays the Out Drawer Summary dialog box.
2	Select the type of document for the appropriate partner and click View . System response The system displays the Out Drawer Browser.
3	Select the documents that you want to copy to the Workspace Browser and click Copy . System response The selected documents are copied to the Workspace Browser.

Posting Documents

Introduction The Post function moves a selected compliant document or group of compliant documents to the Out Documents Browser. 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 To post a document or group of documents, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select the Workspace. System response The system displays the Workspace Browser.
2	Select the compliant documents that you want to move to the Out Documents Browser. Note 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.
3	Click Post . System response The selected documents are moved to the Out Documents Browsers.

UnPosting Documents

Introduction The UnPost function moves a selected document or group of documents to the Workspace Browser. 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 the Out Documents Browser is the active browser.

Note

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

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

Step	Action
1	From the appropriate area of The Desk, select the Out Documents. System response The system displays the Out Documents Summary dialog box.
2	Select the type of document for the appropriate partner and click View . System response The system displays the Out Documents Browser.
3	Select the documents that you want to move back to the Workspace Browser and click UnPost . System response The selected documents are moved back to the Workspace Browser.

Responding to Documents

- Introduction** The Respond function automatically generates a response document by transferring data from an inbound source document. The Respond function is only available when all of the following are true:
- The In Drawer is the currently selected browser.
 - One or more documents are selected.
 - 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 – see *Selecting an inbound translation object* on page 3 - 62 for instructions) in response to the currently selected documents. You can create a turnaround document for non-compliant documents (documents with a NotOK status), as well as for 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

See *Creating an Outbound Relationship* on page 3 - 66 for instructions on setting up an appropriate screen entry translation object.

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

Step	Action
1	From the appropriate area of The Desk, select In Drawer. System response The system displays the In Drawer Summary dialog box.
2	Select the type of document for the appropriate partner and click View . System response The system displays the In Drawer Browser. (Continued on next page)

Step	Action
3	<p>Select the document or documents for which you want to create a turnaround (response) document and click Respond.</p> <p>System response</p> <ul style="list-style-type: none">▶ 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.▶ The turnaround documents that are produced are displayed in the Workspace for you to modify, if necessary, before posting to the Out Documents Browser. <p>Reference See <i>Posting Documents</i> on page 4 - 60 for instructions.</p>

Importing Documents

Introduction Gentran:Server 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

See *Registering New Translation Objects* on page 2 - 7 for more information.

Additional configuration task

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.

You need to see your system administrator about adding the UNC file path or file name to the System Configuration program if *either* of the following are true (because the system may be unable to import the file):

- You select a file from a UNC file path and a local drive is specified for imports of that file type in the System Configuration program.
- You select a file from a local drive and a UNC filename is specified for imports of that type in the System Configuration program.

Reference

See How to Edit an Import Specification in the *Administration Guide* for more information about adding import specifications.

Procedure To import a document, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select the Workspace. System response The system displays the Workspace Browser.
2	Click Import . System response The system displays the Application Files to Import dialog box. (Continued on next page)

Step	Action
3	<p>Select the file or files to be imported and click Open.</p> <p>System response The system imports the documents into the Workspace Browser.</p> <p>The documents either have an OK status (the documents were successfully read and compliance checked) or a NotOK status (the documents failed compliance checking).</p> <p>Note You may not send non-compliant documents—either delete those documents and reprocess them from the data file, or correct the documents in the Document Editor (if you have Screen Entry translation objects for them).</p> <p>Reference See <i>Opening and Editing Documents</i> on page 4 - 42 for more information about correcting the documents in the Document Editor.</p> <p>Important If you import a file and no documents are displayed in the Workspace Browser, check the Audit Log.</p>

Exporting Documents

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
- Set up as the Export translation object in the inbound relationship record for the partner

Notes

- After performing an export command, any subsequent exports to the same export file increases the size of the file by appending the new external data to this file.
- If you set up the Export to Mailbox command on the Inbound Translation Objects dialog box, the document is exported to the mailbox you specify.

References

For additional information, see the following:

- *Registering New Translation Objects* on page 2 - 7
- *Outbound Translation Object Dialog Box* on page 3 - 40
- *Inbound Translation Object Dialog Box* on page 3 - 15 (setting up the Export to Mailbox function)

Procedure To export a document, complete the following steps:

Step	Action
1	<p>From the appropriate area of The Desk, select the In Documents Browser, ?In Documents Browser, or In Drawer Browser.</p> <p>System response The system displays the appropriate summary dialog box for the selected browser.</p>
2	<p>Select the type of document for the appropriate partner and click View.</p> <p>System response The system displays the appropriate document browser.</p>
3	<p>Select the document or documents that are to be exported, and click Export.</p> <p>System response The system displays the Select Export Method Dialog Box.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
4	<p>Select one of the following options and click OK:</p> <ul style="list-style-type: none">▶ To convert all selected documents to data and write them to a single file, select the Export to Single File option. <p>System response The system displays the Choose File to Export Document Dialog Box.</p> <ul style="list-style-type: none">▶ To write selected documents to the files set up in the partner inbound relationship, select the Export to Default Files option.▶ To rename selected documents, select the Select File by Document option. <p>System response The system displays the Choose File to Export Document Dialog Box.</p>

Using Communications

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Overview

In this chapter This chapter explains how to use communications with Gentran:Server.

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

Send process The following 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 information (including control numbers) is generated from the information in the partner profile.
2	After the interchange is built, it is listed in the Interchange browser. Reference See <i>Viewing Interchanges</i> on page 7 - 10 for more information.
3	Communication is established with the remote end. The status of the message is updated based on the success or failure of the communications session. <ul style="list-style-type: none"> ▶ 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. ▶ If communication fails because there is no modem, the interchange and documents are left in a Queued status. Note No user action is required at this point. Interchanges that failed to send are automatically sent as part of the next transmission session.
4	After a successful communications session, the documents are moved to the Out Drawer and the interchange status is set to Sent.

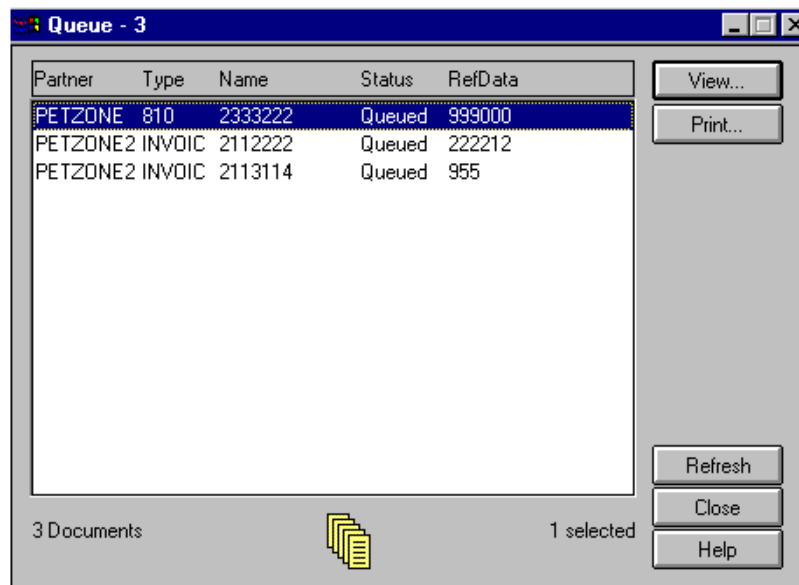
Send Queue Browser

Introduction The Send Queue browser contains a list of documents that are currently queued for the system to send.

Note

To delete a document that is in the Send Queue, you must open the Interchanges Browser and delete the document from there.

Diagram The following illustrates the Send Queue browser:



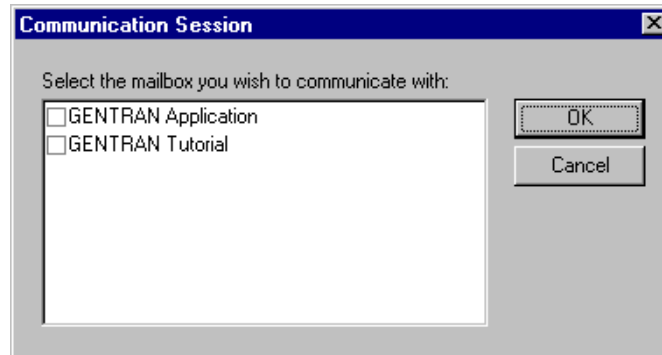
Parts and functions The following lists the parts of the Send Queue browser and their functions:

Part	Function
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Refresh	Refreshes the display of the browser.
Close	Closes the browser.
Help	Displays Online Help.

Communications Session Dialog Box

Introduction The Communications Session dialog box enables you to select mailboxes and initiate a communications session to send and receive data.

Diagram The following illustrates the Communications Session dialog box:



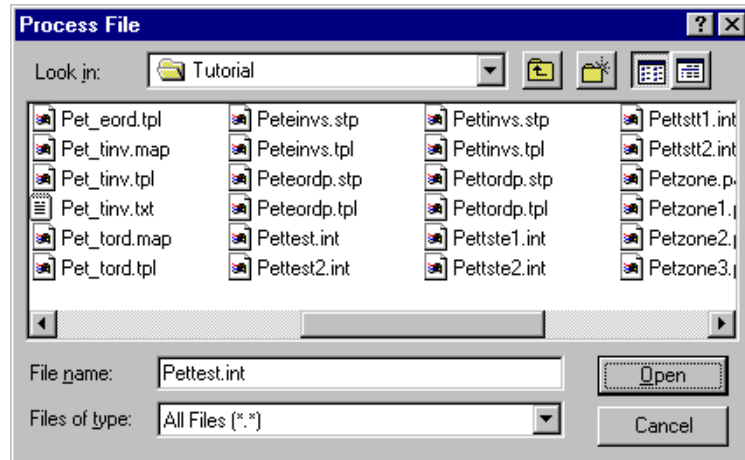
Parts and functions The following lists the parts of the Communications Session dialog box and their functions:

Part	Function
Select the mailbox you wish to communicate with	Displays the list of Gentrans:Server mailboxes.
OK	Exits the dialog box; starts a communication session for the selected mailbox or mailboxes.
Cancel	Cancel the function; exits the dialog box.

Process File Dialog Box

Introduction The Process File feature allows you to invoke the post-communications process with any EDI file, as if the file was received via a communications session.

Diagram The following illustrates the Process File dialog box:



Parts and functions

The following lists the parts of the Process File dialog box and their functions:

Part	Function
Look in	Select the folder where the system should look for the file. Displays the current.
File name	Specify the name of the export file.
Files of type	Select the type of file.
Open	Executes the selected function; exits the dialog box.
Cancel	Exits the dialog box.

Sending Document

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

Step	Action
1	<p>From the appropriate area of The Desk, select Out Documents.</p> <p>System response The system displays the Out Documents Summary dialog box.</p> <p>Note If the documents to be sent are not in the Out Documents Browser, you must post the documents from the Workspace Browser to the Out Documents Browser.</p> <p>Reference See <i>Posting Documents</i> on page 4 - 60 for more information.</p>
2	<p>Select the type of document for the appropriate partner and click View.</p> <p>System response The system displays the Out Documents Browser.</p>
3	<p>Select the document or documents that need to be sent.</p> <p>Note To select a group of documents click the first document, press SHIFT, and click the last document. To select several documents that are not adjacent to each other in the Out Documents list, press CTRL and click the documents.</p>
4	<p>Click Send.</p> <p>System response The system displays the Gentran:Server for Windows dialog box.</p>
5	<p>Click Yes to start the transmission session.</p>

Sending All Documents

- Introduction** You can send all documents in the Out Documents by two different methods:
- Select the Transmit icon on The Desk.
 - Access the Out Drawer browser and click **Send**.

Procedure: To send all documents, complete the following steps:
Method 1

Step	Action
1	From the appropriate area of The Desk, select Transmit . System response The system displays the Gentran:Server for Windows dialog box.
2	Click Yes to start the transmission session. System response The system displays the Communications Session Dialog Box.
3	<ul style="list-style-type: none"> • Select one or more mailboxes for which you want to send data. • Click OK to start a communication session to send data (click Cancel if you want to cancel the transmission session). <p>Note This action sends all documents currently located in the Out Documents for which the partner is using one of the selected mailboxes.</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, as a result, the In Documents and ?In Documents are updated with any data received.</p>

Procedure:
Method 2

To send all documents, complete the following steps:

Step	Action
1	<p>From the appropriate area of The Desk, select Out Documents.</p> <p>System response The system displays the Out Documents Summary dialog box.</p> <p>Note If the documents to be sent are not in the Out Documents, you must post the documents from the Workspace to the Out Documents.</p> <p>Reference See <i>Posting Documents</i> on page 4 - 60 for more information.</p>
2	<p>Select the type of document for the appropriate partner and click View.</p> <p>System response The system displays the Out Documents Browser.</p>
3	<p>Do not select any documents. If any documents are selected, press CTRL and click the primary mouse button to deselect them.</p>
4	<p>Click Send.</p> <p>System response The system displays the Gentran:Server for Windows dialog box.</p>
5	<p>Click Yes to start the transmission session.</p> <p>Note All the documents in the Out Documents are sent to the appropriate mailboxes.</p>

Resending Documents

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 copy of the document and execute the Send process again using the copy.

Procedure To resend a document, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select Out Drawer . System response The system displays the Out Drawer Summary dialog box.
2	Select the type of document for the appropriate partner and click View . System response The system displays the Out Drawer Browser.
3	Select the document or documents that need to be resent. Note To select a group of documents click the first document, press SHIFT , and click the last document. To select several documents that are not adjacent to each other in the Out Drawer list, press CTRL and click the documents.
4	Click Copy to make a copy of the document and place the copy in the Workspace.
5	From the appropriate area of The Desk, select Workspace . System response The system displays the Workspace Browser.
6	Make any necessary changes to the documents. Note You can modify a document only if there is a Screen Entry translation object for the partner relationship.
7	Select the documents and click Post . System response The documents are posted to the Out Documents Browser. (Continued on next page)

Step	Action
8	From the appropriate area of The Desk, select Out Documents . System response The system displays the Out Documents Summary dialog box.
9	Select the type of document for the appropriate partner and click View . System response The system displays the Out Documents Browser.
10	Select the documents and click Send . System response The system displays the Gentran:Server for Windows dialog box.
11	Click Yes to start the transmission session.

Receiving Documents

Introduction Any time a Send session is executed, the system automatically checks your Mailbox for any information waiting to be received by your system. 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 two methods:

- From the Commands menu, select the Receive command.
- Access the In Documents browser and click Receive.

Procedure: method 1

To start a receive-only session, complete the following steps:

Step	Action
1	From the Commands menu, select Receive . System response The system displays the Communications Session Dialog Box.
2	Click OK to start a communication session to send data. Note The system initiates a receive-only session and the In Documents Browser and ?In Documents Browser are updated with any data received.

Procedure: method 2

To start a receive-only session, complete the following steps:

Step	Action
1	From the View menu, select In Documents . System response The system displays the In Documents Summary dialog box.
2	Select the type of document for the appropriate partner and click View . System response The system displays the In Documents Browser. (Continued on next page)

Step	Action
3	<p>Click Receive.</p> <p>System response The system displays the Communications Session Dialog Box.</p>
4	<ul style="list-style-type: none">▶ Select one or more mailboxes for which you want to send data.▶ Click OK to start a communication session to send data. <p>Note This action initiates a communications session and updates the In Documents Browser and ?In Documents Browser with any data received as a result of that session.</p>

Viewing the Send Queue

Introduction The Send Queue browser displays a list of the 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	From the View menu, select Send Queue . System response The system displays the Send Queue Browser.
2	Select a document or documents.
3	<ul style="list-style-type: none"> ▶ Click View to view the contents of any of the following: <ul style="list-style-type: none"> — Selected document (raw EDI data) — Formatted document — Translation report <p>Reference See <i>Viewing Documents</i> on page 4 - 45 for more information.</p> <ul style="list-style-type: none"> ▶ Click Print to print the selected documents or summary of the documents. <p>Reference See <i>Printing Documents</i> on page 4 - 56 for more information.</p>

Processing Data Files

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

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

Step	Action
1	From the Commands menu, select Process File . System response The system displays the Process File Dialog Box.
2	Select the desired data file and click Open . System response The system immediately invokes the post-communications process with the file, as if the file was received via a communication session.

Using External Data

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Overview

In this chapter This chapter explains how to use external data with Gentran:Server.

References

See the following for more information:

- *Restoring Archived Data* on page 10 - 44
- *Interchanges Browser* on page 7 - 3

External data

Gentran:Server can track the relationship between an EDI document or interchange and the corresponding external (application) data. For import processing, the system makes a persistent copy of the external data at the start of processing. For inbound (process file and export) processing, the system again copies the external data file for persistent storage. Gentran:Server also enables you to archive external data.

You can specify which external data (process file, import, and export) is copied to the External Data folder in the System Configuration subsystem.

Note

If you do not specify that the system should copy external data for at least one of the export, import, or process file functions, the option to view external data is not available.

Reference

For more information, see the following:

- *Importing Documents* on page 4 - 64
- *Exporting Documents* on page 4 - 66
- *Using Tracking* on page 9 - 1
- *Using Archive and Restore* on page 10 - 1
- *System Configuration—External Data Tab* in the *Administration Guide*

External data viewer

The External Data viewer enables you to do the following:

- View a list of all external data files associated with documents or interchanges that were sent or received.
- Filter the display of external data.
- View external data, correlated EDI data, and the related translator report (if they are available).

Note

When viewing EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.

External Data Summary Viewer

Introduction The External Data Summary Viewer enables you to view a list of all external data files associated with documents or interchanges that were sent or received. The External Data Summary Viewer can always be accessed.

Information organization The information displayed in the External Data Summary Viewer is organized in a hierarchical manner, as shown below:







Level	How to access	Information displayed
External data file (numbered)	Open External Data Summary Viewer.	<ul style="list-style-type: none"> • File path and name • Date and time the file was created
Document or Interchange	Double-click an external data file.	<ul style="list-style-type: none"> • Document or interchange control number • Associated partner • Document type • Acknowledgement status • Document name • Reference data • Date and time the document was created <p>Note If any of these components are missing or not appropriate for a particular group, they are not displayed.</p>

External Data Summary functions You can perform the following functions on the External Data Summary Viewer:

- Filter the display of external data by date/time and action from the External Data Filter dialog box.
- Display the external data, raw-EDI data, and translator report data for the selected external data file in the appropriate browser panes.
- Print a selected item.
- Delete the external data file from the External Data folder.

Part	Function
middle right pane—Gentran Data	Displays the associated document in EDI format (if this option is selected from the View\External Data menu). Note This option is not available if the document used in translation does not exist.
(lower right pane—Export Document Summary Translator Report	Displays a report of the external actions the translator took on this document and lists any EDI- or translation object-based compliance errors (if this option is selected from the View\External Data menu). Reference See Error Messages in the <i>Administration Guide</i> for more information.

Icons The following lists the icons that the system uses on the External Data Summary Viewer:

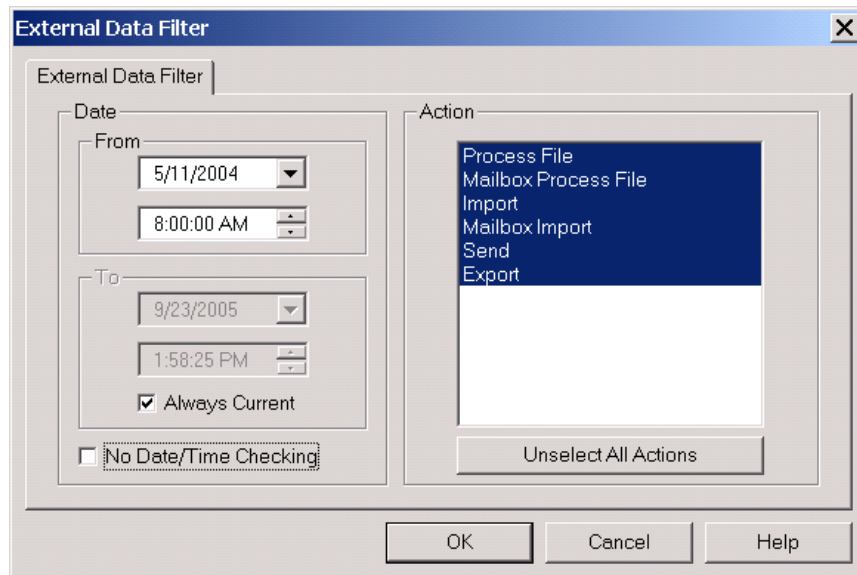
Icon	Description
	Indicates a process file or mailbox process file system activity.
	Indicates a send system activity.
	Indicates an import or mailbox import system activity.
	Indicates an export system activity.
	Indicates an interchange related to the external data file.
	Indicates a document related to the external data file. Note If this icon is red, it indicates that the document contains errors.

External Data Filter Dialog Box

Introduction The External Data Filter dialog box allows you to filter the display of external data files by date and system action (process file, mailbox process file, import, mailbox import, send, and export).

To access When the External Data Browser is active, select Filter from the Commands menu. Or, from the Options menu, select Preferences and click on the External Data Filter tab.

Diagram The following illustrates the External Data Filter dialog box:



Parts and functions The following lists the parts of the External Data Filter dialog box and their functions:

Part	Function
Date From	Select the beginning date and time of a date/time range, from which the system filters the display of external data files. Note The Date From box is only active if the No Date/Time Checking check box is not selected. (Continued on next page)

Part	Function
Date To	<p>Select the end date and time of a date/time range, to which the system filters the display of external data files.</p> <p>Note The Date To box is not active if either the No Date/Time Checking check box is selected or the Always Current check box is selected.</p>
Always Current	<p>Indicate that the end date for the date range is always the current system date and time.</p> <p>Note The Always Current check box is only active if the No Date/Time Checking check box is not selected.</p>
No Date/Time Checking	<p>Indicate if the system filters the display of external data files by date and time (if selected).</p>
Action	<p>Contains a list of all the actions the system can perform using external data files. This list allows you to filter the display of external data files by the actions you specify.</p> <p>Note The default display is all actions, but you can clear them.</p>
Unselect All Actions	<p>Clears all the actions.</p> <p>Note This allows you to filter the display of external data files by the actions you specify.</p> <p>Warning At least one action must be selected.</p>
OK	<p>Exits the dialog box; saves the selections.</p>
Cancel	<p>Exits the dialog box without saving selections.</p>
Help	<p>Opens the online help.</p>

Viewing External Data Files

Procedure To view external data files, complete the following steps:

Step	Action	
1	From the View menu, select External Data\Browser . System response The system displays the External Data Summary Viewer.	
2	Do you want to filter the display of external data files by action or date? <ul style="list-style-type: none"> ▶ If <i>yes</i>, see <i>Filtering External Data Files</i> on page 6 - 9. ▶ If <i>no</i>, continue with step 3. 	
3	Select an external data file.	
4	Use the following table to determine your next step:	
5	To view the external data for a single selected file,	Select View > External Data > Related External Data . Note When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
6	To view the related EDI data,	Select View > External Data > Gentran Data . Note When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
7	To view the translator report for actions taken on the external data file,	Select View > External Data > Translator Report .
8	To delete the external data file from the External Data folder,	1. Select the appropriate file in the left pane of the viewer. 2. Select View > Delete .
9	To print the external data file, EDI data, or translator report,	1. Select the appropriate right pane of the viewer. 2. Select File > Print .

Filtering External Data Files

Introduction When the External Data Summary viewer is active, the Filter function enables you to filter the display of external data files by date and action.

Procedure To sort external data files by date and/or action, complete the following steps:

Step	Action
1	From the View menu, select External Data\Browser . System response The system displays the External Data Summary Viewer.
2	From the Commands menu, select Filter . System response The system displays the External Data Filter Dialog Box.
3	Do you want the system to filter the display of external data files by date and time? <ul style="list-style-type: none"> ▶ If <i>yes</i>, clear the No Date/Time Checking check box and proceed with step 4. ▶ If <i>no</i>, select the No Date/Time Checking check box and proceed with step 6.
4	Use the Date From slide bar to select the beginning date of a date range, from which the system filters the display of external data files.
5	Do you want the end date for the date range to always be the current system date and time? <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the Always Current check box. ▶ If <i>no</i>, clear the Always Current check box and move the Date to slide bar to the date and time you want to use. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
6	<p data-bbox="610 310 1369 342">Do you want to filter the display of external data files by action?</p> <ul data-bbox="610 359 1352 422" style="list-style-type: none"><li data-bbox="610 359 1352 422">▶ If <i>yes</i>, from the Action list, select the actions that you want displayed. <p data-bbox="659 443 732 470">Note</p> <p data-bbox="659 474 1406 638">The default display is all actions, but you can click actions to clear them and change the display. Alternately, you can click Unselect All Actions to clear all actions, so you can then click the one or more actions to select them. At least one action must be selected.</p> <ul data-bbox="610 659 976 690" style="list-style-type: none"><li data-bbox="610 659 976 690">▶ If <i>no</i>, continue with step 7.
7	<p data-bbox="610 724 737 751">Click OK.</p> <p data-bbox="610 779 849 810">System response</p> <p data-bbox="610 814 1362 877">The system filters the display of the external data files using the criteria you specified.</p>

Using Interchanges

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Overview

In this chapter This chapter explains how to use interchanges with Gentran:Server.

Reference

See *Restoring Archived Data* on page 10 - 44 for more information about the Restored Interchanges browser.

Interchanges browser

The Interchanges browser enables you to do any of the following:

- View a hierarchical list of all the interchanges, group, and documents that were sent or received.
- View status information for the interchanges (such as whether or not a functional acknowledgement was received and the status of that acknowledgement).
- Filter the display of interchanges.
- Access the documents within the interchanges.
- View external data, EDI data, and the related translator report (if they are available).

Note

When viewing EDI data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.

Interchanges Browser

Introduction The Interchanges browser enables you to view a list of all the interchanges, groups, and documents that were sent or received. The Interchanges browser can always be accessed. This browser contains status information about the interchanges (such as whether or not a functional acknowledgement was received and the status of that acknowledgement).

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

Level	How to access	Information displayed (in middle pane)
Interchange	Open Interchanges browser.	<ul style="list-style-type: none"> • Direction of the interchange • Date and time the interchange was created • Partner name • Control number • Interchange process status • Network status • Interchange acknowledgement status • Message status <p>Note If any of these components are missing or not appropriate for a particular interchange, they are not displayed.</p>
Group	Double-click an interchange.	<ul style="list-style-type: none"> • Group control number • Group type • Group acknowledgement status <p>Note If any of these components are missing or not appropriate for a particular group, they are not displayed.</p> <p style="text-align: right;">(Continued on next page)</p>

Level	How to access	Information displayed (in middle pane)
Document	Double-click a group.	<ul style="list-style-type: none"> • Document compliant status • Document control number • Document type • Document name • Reference data • Document compliant status • Transaction acknowledgement status <p>Note If any of these components are missing or not appropriate for a particular document, they are not displayed.</p>
document data	Double-click a document.	<p>Document data</p> <p>Note A screen entry translation object for that document must be available on your system.</p>

Browser functions

You can perform the following functions on the Interchanges browser:

- Filter the display of interchanges by date, partner, and direction (inbound and outbound) from the Interchanges Filter dialog box.
- Display the external data, raw-EDI data, and translator report data for the selected interchange or document in the appropriate browser panes.

Note

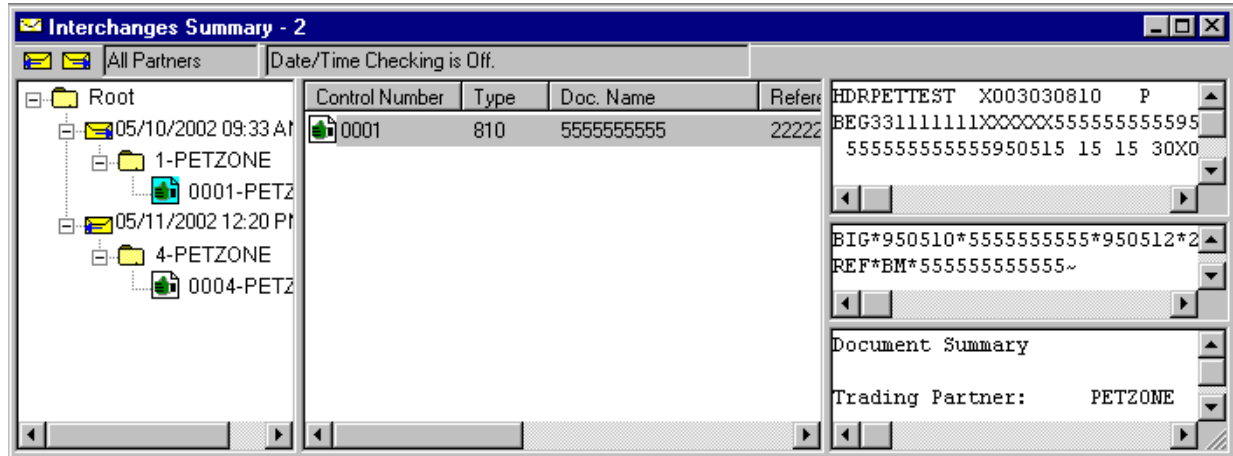
When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.

- Toggle the status of interchanges between Ready to Send and Hold.
- Manually change the status of groups to Acknowledged.
- Print or delete a selected item.

Note

You might want to use the toggle function if you do not want to send an interchange right away.

Diagram The following illustrates the Interchanges browser with external data, EDI data, and translator report options turned on:



Parts and functions




The following lists the parts of the Interchanges browser and their functions.

Part	Function
Status bar	<p>Reflects the filter specifications from the Interchange Filter Dialog Box.</p> <p>Note The Electronic Commerce Manager status bar is updated when you select a single item from the middle pane.</p>
left pane— Interchanges tree	<p>Displays a list of all the interchanges, groups, and documents that were sent or received. Also displays the time created and partner name.</p> <p>Note To refresh the display of the Interchanges browser, press F5.</p> <p>Reference See the following for more information:</p> <ul style="list-style-type: none"> • <i>Information organization</i> on page 7 - 3 • <i>Document level status icons</i> on page 7 - 7 <p style="text-align: right;">(Continued on next page)</p>

Part	Function
middle pane— detailed list	<p>Displays a detailed list of the selected interchange, group, or document. The information displayed depends on the level.</p> <p>Notes</p> <ul style="list-style-type: none"> • To select multiple items, press and hold the CTRL key while selecting the items. • To refresh the display of the Interchanges browser, right-click the middle pane and select Refresh from the shortcut menu (or press F5).
upper right pane—External Data	<p>Displays the data file used in translation (if this option is selected from the View\Interchanges menu).</p> <p>Notes</p> <ul style="list-style-type: none"> • This option is only available if a single item is selected from the detailed list. • This option is not available if the external data file used in translation does not exist. • When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
middle right pane—Gentran Data	<p>Displays the data in EDI format (if this option is selected from the View\Interchanges menu).</p> <p>Notes</p> <ul style="list-style-type: none"> • This option is only available if a single item is selected from the detailed list. • When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
lower right pane—Translator Report	<p>Displays a report of the actions the translator took on this document and lists any EDI- or translation object-based compliance errors (if this option is selected from the View\Interchanges menu).</p> <p>Note This option is only available if a single item is selected from the detailed list.</p> <p>Reference See Error Messages in the <i>Administration Guide</i> for more information.</p>

Document level status icons

The following lists the status icons that the system may use at the document level on the Interchanges browser:

Status	Icon	Description
OK		(green) — Indicates that the documents are fully compliant with the EDI standard and are eligible for further processing.
NotOK		(red) — Indicates one of the following: <ul style="list-style-type: none"> • The document failed to comply with the EDI standard. If this is the cause of the error, the errors will be 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. • The received document could not be associated with a specific trading partner. If this is the case, the partner for the document is listed as Unknown. To associate this document, and the other documents received in the interchange with a partner, attach the documents from the Interchange browser. • 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 will be 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. • 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 will be listed on the translator report for the interchange containing the document.
Duplicate		(yellow) — Indicates the document has the same name as another document on the system.

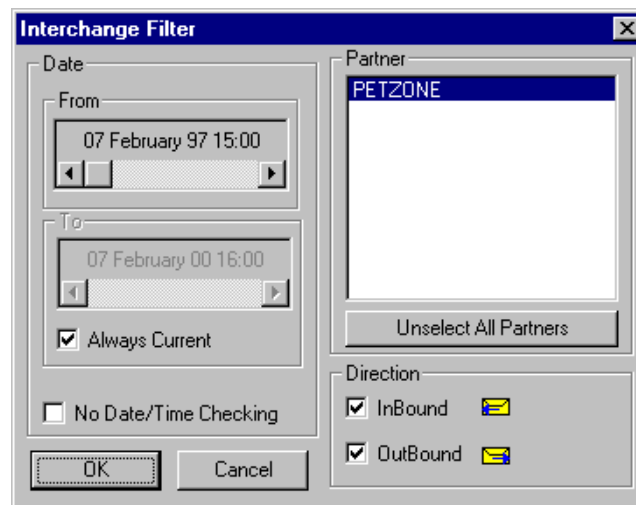
Interchange Filter Dialog Box

Introduction The Interchange Filter dialog box allows you to filter the display of interchanges by date, partner, and direction (inbound and outbound).

Note

You can set global Interchange Filter preferences in the Gentran:Server Preferences dialog box on Interchange Filter tab. Access the Preferences dialog box by selecting **Preferences** from the Options menu.

Diagram The following illustrates the Interchange Filter dialog box:



Parts and functions The following lists the parts of the Interchange Filter dialog box and their functions:

Part	Function
Date From	Select the beginning date of a date range, from which the system should filter the display of interchanges. Note The Date From box is only active if the No Date/Time Checking check box is not selected. (Continued on next page)

Part	Function
Date To	<p>Select the end date of a date range, from which the system should filter the display of interchanges.</p> <p>Note The Date To box is not active if either the No Date/Time Checking check box is selected or if the Always Current check box is selected.</p>
Always Current	<p>Indicate that the end date for the date range is always the current system date and time.</p> <p>Note The Always Current check box is only active if the No Date/Time Checking check box is not selected.</p>
No Date/Time Checking	<p>Indicate if the system filters the display of interchanges by date and time (if selected).</p>
Partner	<p>Contains a list of all partner profiles on your system. This list allows you to filter the display of interchanges by the partners you specify.</p> <p>Note The default display is all partners, but you can click on partner profiles to clear them.</p>
Unselect All Partners	<p>Clears all partner profiles.</p> <p>Note This allows you to filter the display of interchange by the partners you specify.</p> <p>Warning At least one partner must be selected.</p>
InBound Outbound	<p>Select the direction of traffic (inbound and outbound) for the system to filter the display of interchanges.</p> <p>Note The default display is both inbound and outbound interchanges.</p> <p>Warning At least one of the Inbound/Outbound check boxes must be selected.</p>
OK	<p>Exits the dialog box; saves the selections.</p>
Cancel	<p>Exits the dialog box without saving selections.</p>

Viewing Interchanges

Procedure To view interchanges, complete the following steps:

Step	Action	
1	From the appropriate area of The Desk, select Interchanges . System response The system displays the Interchanges Browser. Note To refresh the display of the Interchanges browser, right-click the middle pane and select Refresh from the shortcut menu (or press F5).	
2	Do you want to filter the display of interchanges by status? <ul style="list-style-type: none"> • If <i>yes</i>, see <i>Filtering the Display of Interchanges</i> on page 7 - 12. • If <i>no</i>, continue with step 3. Note The Filter function enables you to filter the display of interchanges by date, partner, and direction (inbound and outbound).	
3	Select an interchange.	
4	Use the following table to determine your next step:	
	To view the related external data for a single selected interchange,	Select View > Interchanges > Related External Data . Note When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
	To view the content of a single selected interchange in raw EDI data format,	Select View > Interchanges > Gentran Data . Note When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu. (Continued on next page)

Step	Action	
4 (contd)	To view the translator report for a single selected interchange,	Select View > Interchanges > Translator Report .
	To print a selected interchange or a summary of interchanges,	Print from the File menu.
	To delete a selected interchange and all associated documents,	Select Document > Delete . Notes <ul style="list-style-type: none"> • 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. • 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. • If an interchange contains a document that is waiting for acknowledgement processing (acknowledgement generation or reconciliation), you cannot delete it until this processing is complete.
	To attach an interchange to a partner,	Select Document > Attach .

Filtering the Display of Interchanges

Introduction When the Interchanges browser is active, the Filter function enables you to filter the display of interchanges by date, partner, and direction (inbound and outbound).

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

Step	Action
1	From the appropriate area of The Desk, select Interchanges . System response The system displays the Interchanges Browser.
2	From the Commands menu, select Filter . System response The system displays the Interchange Filter Dialog Box.
3	Do you want the system to filter the display of interchanges by date and time? <ul style="list-style-type: none"> ▶ If <i>yes</i>, clear the No Date/Time Checking check box and proceed with step 4. ▶ If <i>no</i>, select the No Date/Time Checking check box and proceed with step 6.
4	Use the Date From slide bar to select the beginning date of the date range, from which the system will filter the display of interchanges.
5	Do you want the end date for the date range to always be the current system date and time? <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the Always Current check box. ▶ If <i>no</i>, clear the Always Current check box and move the Date to slide bar to the date and time you want to use. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
6	<p>Do you want to filter the display of interchanges by partner?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the partners that you want displayed from the Partner list (lists all partner profiles on your system). <p>Note The default display is all partners, but you can click partner profiles to clear them and change the display. Alternately, you can click Unselect All Partners to deselect all partner profiles. You can then click one or more profiles to select them. At least one partner must be selected.</p> <ul style="list-style-type: none"> ▶ If <i>no</i>, continue with step 7.
7	<p>Which direction do you want to filter the interchange?</p> <p>Default The default display is both inbound and outbound interchanges. Clear the Inbound or Outbound check box to clear the direction.</p> <p>Note At least one of the Direction check boxes must be selected.</p>
8	<p>Click OK.</p> <p>System response The system filters the interchange display based on the criteria you 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 Use this procedure to view the documents within an interchange.

Step	Action
1	<p>From the appropriate area of The Desk, select Interchanges.</p> <p>System response The system displays the Interchanges Browser.</p> <p>Notes</p> <ul style="list-style-type: none"> ▶ The Interchanges browser displays all interchanges, group, and documents that were sent or received. ▶ To refresh the display of the Interchanges browser, right-click the middle pane and select Refresh from the shortcut menu (or press F5).
2	<p>Select a document and proceed with the next step or double-click a document to view it.</p> <p>Note You must have a screen entry translation object for this document available on your system.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action	
3	With a document selected, use the following table to determine your next step:	
	To view a translator report of the actions the translator took on this document,	Select View > Interchanges > Translator Report .
	To view the content of a single selected interchange in raw EDI data format,	Select View > Interchanges > Gentran Data . Note When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
	To view the related external data of a single selected interchange,	Select View > Interchanges > Related External Data . Note When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
	To print a selected document or translation report,	Select File > Print .
	To delete a selected document,	Select Document > Delete .
	To copy the document to the appropriate browser,	1. Select Document > Copy . 2. Select the appropriate browser from the submenu. (?In Documents or In Documents Browser for compliant Inbound documents; Workspace Browser for outbound documents)

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. Use this 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 these documents are listed without a partner in the Interchanges browser.

Procedure Use this procedure to attach an interchange to a partner.

Step	Action
1	From the appropriate area of The Desk, select Interchanges . System response The system displays the <i>Interchanges Browser</i> .
2	Select one interchange.
3	Does the partner already exist? <ul style="list-style-type: none"> • If <i>yes</i>, continue with step 4. • If <i>no</i>, you must create the partner before you can continue. Reference See <i>Creating a Partner Definition</i> on page 3 - 56 for instructions.
4	From the Document menu, select Attach . System response The system displays the Select Partner dialog box.
5	Select the desired partner from the list and click OK . System response The system links the selected interchange to this partner and returns to the Interchanges browser.
6	Does the partner to which you are attaching the interchange have more than one interchange definition? <ul style="list-style-type: none"> • If <i>yes</i>, you are prompted with an additional dialog box. Continue with the next step. • If <i>no</i>, continue with Step 8. <p style="text-align: right;">(Continued on next page)</p>

Step	Action	
7	Use the following table to determine what to select on the dialog box:	
	If your partner has more than one interchange definition,	<ol style="list-style-type: none"> 1. Select the appropriate interchange definition. 2. Click OK.
	If your partner has more than one group definition,	<ol style="list-style-type: none"> 1. Select the appropriate group definition. 2. click OK.
	If your partner has more than one relationship defined for a document type in the interchange,	<ol style="list-style-type: none"> 1. Select the appropriate relationship definition. 2. Click OK.
8	<p>After you attach the interchange to a partner, open ?In Documents by selecting it from the appropriate area of The Desk.</p> <p>Note You can then export, print, or move the documents to the In Drawer Browser.</p>	

Resending Interchanges

Introduction

There are two ways to resend interchanges:

- To automatically resend all outbound interchanges, you can set the Send Options preference.
- To resend specific outbound interchanges, you can use the Resend command from the Interchanges browser.
- To resend interchanges during the next communications session, you can use the Queue for the Resend command from the Interchange browser

Note

You can only resend interchanges that were previously sent or that have a status of Ready to send.

Resending interchanges automatically

You can set an option for the system to automatically check for interchanges that are stuck in the Send Queue. The interval for checking the Send Queue is set by default to 30 minutes in the Registry. However, you can change this value in the UPIDValidationInterval key.

During the first system check, the Gentran Executive Service checks for interchanges that are possibly stuck and places those interchanges into a queue. During the next system check, the Executive Service checks if those interchanges are still in the queue. Any that are still in the queue at the second system check are flagged to be sent during the next communications session.

To automatically resend outbound interchanges, complete the following steps:

Step	Action
1	From the Options menu, select Preferences . System response The system displays the Preferences dialog box.
2	Click the Send Options tab.
3	Click the box for Check for interchanges that did not send .
4	Click OK .
5	Optional Change the System Check Interval in the registry. (Default is 30 minutes.)
6	Restart services.

Queueing Interchanges for Sending with the Next Communications Session

Interchanges queued for sending are sent with the next matching communications session. If the next session targets a specific partner or mailbox, and the interchanges do not match that criteria, the interchanges are not resent.

Example 1

Interchanges are queued for resending to mailbox SIB. A communications session for the “Gentran Tutorial” mailbox executes. The queued interchanges are not sent.

Example 2

Interchanges for the partner PETZONE are queued for resending. A communications session for data only for the partner PETZONE2 executes. The queued interchanges are not sent.

To queue interchanges for sending with the next communications session:

Step	Action
1	From the appropriate area of The Desk, select Interchanges . System response The system displays the Interchanges Browser.
2	Select the outbound interchange that needs resent. Multiple interchanges can be selected using the Shift or Ctrl key (as in Windows Explorer).
3	From the Document menu, select Queue for Resend . System response The interchanges “Interchanges Process Status” will change to “Ready to Send.”

Resending a specific interchange

To resend a specific outbound interchange, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select Interchanges . System response The system displays the Interchanges Browser.
2	Select the outbound interchange that needs to be resent.
3	From the Document menu, select Resend . System response The system displays the Gentran:Server for Windows dialog box.
4	Click Yes to start the transmission session.

Resend process

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

Stage	Description
1	<p>When the resend command is executed, the system first determines if it is a TRADACOMS interchange. If the interchange is TRADACOMS, the system increments the current version number in the FIL segment by one. After this update, the interchange is resent in the same manner as all other interchanges.</p>
2	<p>Communication is established with the remote end. The status of the message is updated based on the success or failure of the communications session.</p> <ul style="list-style-type: none"> ▶ If 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. ▶ If communication fails because there is no modem, the interchange and documents are left in a Queued status. <p>Note No user action is required at this point. Interchanges that failed to send are automatically sent as part of the next transmission session.</p>
3	<p>The documents are moved to the Out Drawer Browser and the interchange status is set to Sent.</p>

Manually Acknowledging an Interchange, Group, or Document

Introduction The Acknowledge function does *not* generate an acknowledgement; it merely changes the status of the outbound document. The status of an interchange, group, or document in the Interchanges browser may need to be manually set to acknowledged for many reasons.

Example

You contact a partner about an overdue document and the partner verifies that it was received but they did not send an acknowledgement.

Procedure To manually change the status of an interchange, group, or document to acknowledged, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select Interchanges . System response The system displays the Interchanges Browser.
2	Select an unacknowledged interchange, group, or document that needs to be set to acknowledged. Note Unacknowledged documents are marked with one of the following statuses. <ul style="list-style-type: none"> ▶ Overdue ▶ Waiting ▶ Sent ▶ OnNet ▶ PickedUp ▶ NetErr ▶ NetWarn
3	From the Document menu, select Ack . System response The system sets the status of the document to acknowledged.

Using Acknowledgements

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Overview

In this chapter

This chapter explains how to use Gentran:Server acknowledgements, including the following topics:

- Defining acknowledgement criteria (inbound)
- Defining acknowledgement criteria (outbound)
- Manually acknowledging a document, group, or interchange
- Checking for overdue acknowledgements

Acknowledgement

Acknowledgements are sent to a trading partner to inform them that you received a transmission they sent and to inform them of any errors. You must define the level of acknowledgements that you expect from your trading partners and you are sending to your trading partners upon receipt of a transmission.

Defining Inbound Acknowledgement Criteria

Introduction

The criteria that the system uses to acknowledge inbound documents, functional groups, and interchanges is defined at the partner level on the Partner Editor Inbound Relationship dialog boxes. The translation objects used by the system to generate functional acknowledgements are included as system translation objects and are registered automatically when you install Gentran:Server.

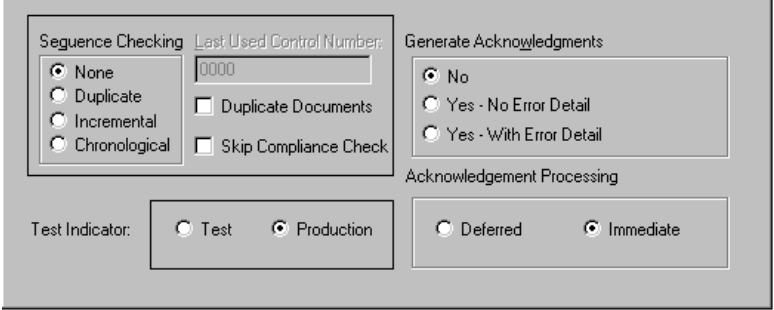
Note

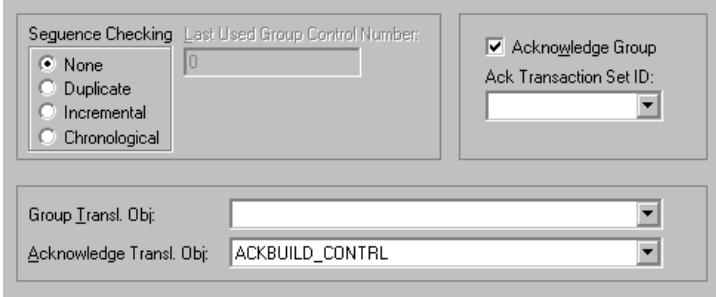
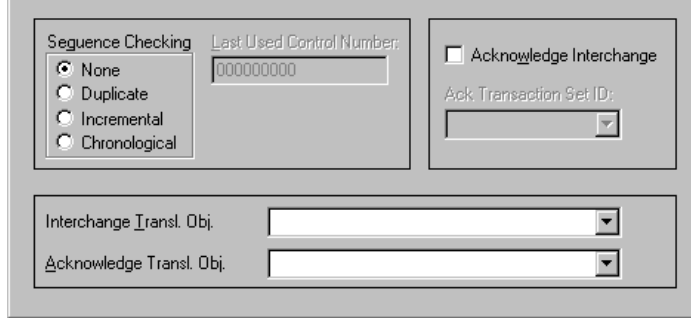
If you generate functional acknowledgements as a result of receiving documents for an inbound relationship, you must set up the corresponding outbound relationship to generate the acknowledgements your partner requests.

Reference

See *Creating an Outbound Relationship* on page 3 - 66 for information about how to establish an outbound relationship to generate acknowledgements.

Procedure To define criteria to generate acknowledgements, complete the following steps:

Step	Action
1	<p>Document acknowledgement criteria is defined when you set up the partner relationship using the Advanced options on the Inbound Relationship Dialog Box, which are illustrated below.</p>  <p>Note If you select Immediate acknowledgement processing, acknowledgement reconciliation occurs during the inbound break session. If you select Deferred acknowledgement processing (the default), reconciliation occurs at its scheduled interval.</p> <p>References</p> <ul style="list-style-type: none"> ▶ See System Configuration—System Tab in the <i>Administration Guide</i> for more information about setting the intervals for deferred acknowledgement processing. ▶ See <i>Creating an Inbound Relationship</i> on page 3 - 58 for more information about setting parameters on the Inbound Relationship dialog box. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
2	<p>Functional Group acknowledgement criteria is defined when you set up the Inbound Group Entry using the Advanced options on the Inbound Group Entry Dialog Box, as illustrated below.</p>  <p>Reference See <i>Selecting an inbound functional group</i> for more information about setting parameters on the Inbound Group Entry dialog box.</p>
3	<p>Interchange acknowledgement criteria is defined when you set up the Inbound Interchange Entry using the Advanced options on the Inbound Interchange Entry Dialog Box, as illustrated below.</p>  <p>Reference See <i>Selecting an inbound interchange</i> on page 3 - 64 for more information about setting parameters on the Inbound Interchange Entry dialog box.</p>

Defining Outbound Acknowledgement Criteria

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

However, you must establish the level of acknowledgements that you expect by completing the Partner Editor Outbound Relationship dialog boxes.

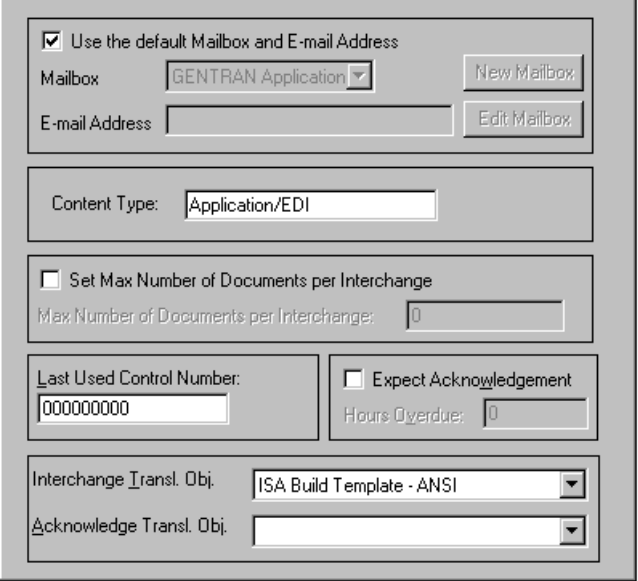
Note

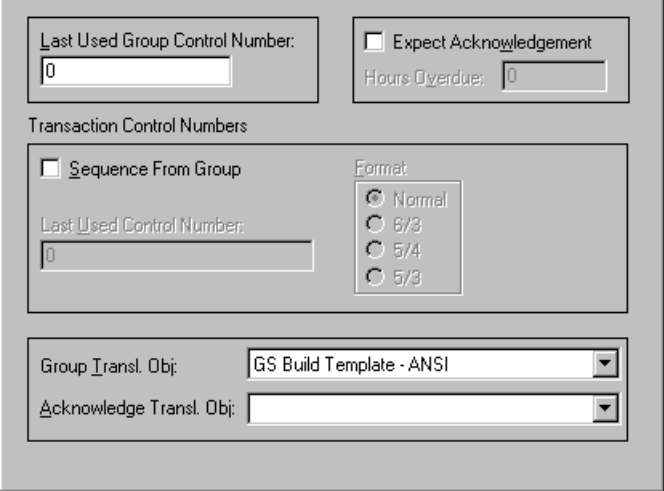
If you are receiving functional acknowledgements as a result of sending documents for an outbound relationship, you must set up the corresponding inbound relationship to receive the acknowledgements you expect to receive.

Reference

See *Creating an Inbound Relationship* on page 3 - 58 for information about how to establish an inbound relationship to receive acknowledgements.

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

Step	Action
1	<p>The requirement for receiving interchange acknowledgements is set in the Advanced section of the Outbound Interchange Entry Dialog Box, as illustrated below.</p>  <p>Reference See <i>Selecting an outbound interchange</i> on page 3 - 73 for more information about setting parameters on the Outbound Interchange Entry dialog box.</p> <p>Recommendation 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;">(Continued on next page)</p>

Step	Action
2	<p>The requirement for receiving functional group acknowledgements is set in the Advanced section of the Outbound Group Entry Dialog Box, as illustrated below.</p>  <p>Recommendation 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>Note If the acknowledgement is overdue (it is not received within the number of hours designated in the Hours Overdue box), it is indicated with a status of Overdue on the Interchanges Browser.</p> <p>Reference</p> <ul style="list-style-type: none"> ▶ See <i>Selecting an outbound functional group</i> on page 3 - 71 for more information about setting parameters on the Outbound Group Entry dialog box. ▶ See <i>Viewing Documents within Interchanges</i> on page 7 - 14 for instructions on how to access the Interchanges browser. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
3	<p>The requirement for receiving transaction set acknowledgements is set in the Advanced section of the Outbound Relationship Dialog Box, as illustrated below.</p> <div data-bbox="615 436 1304 638" style="border: 1px solid gray; padding: 5px;"><p>Last Used Control Number: <input type="text" value="0000"/></p><p><input type="checkbox"/> Expect Acknowledgement <input type="checkbox"/> Duplicate Documents</p><p>Hours Overdue: <input type="text" value="0"/> Test Indicator: <input type="radio"/> Test <input checked="" type="radio"/> Production</p></div> <p>Reference See <i>Finalizing the outbound relationship</i> on page 3 - 75 for more information about setting parameters on the Outbound Relationship dialog box.</p>

Manually Acknowledging Documents

Introduction The Acknowledge function does *not* generate an acknowledgement; it merely changes the status of the outbound document. The status of a document in the Out Drawer browser may need to be manually set to Acknowledged for many reasons.

Example

You have contacted a partner about an overdue document, and that partner verified that it was received but they are not sending you an acknowledgement.

Reference

See *Manually Acknowledging an Interchange, Group, or Document* on page 7 - 21 for more information.

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

Step	Action
1	From the appropriate area of The Desk, select Out Drawer . System response The Out Drawer Summary dialog box is displayed.
2	Select the type of document for the appropriate partner and click View . System response The system displays the Out Drawer Browser.
3	Select an Unacknowledged document that needs to be set to “Ack’d” (acknowledged). Note Unacknowledged documents are marked with one of these states. <ul style="list-style-type: none"> ▶ Overdue ▶ Waiting ▶ Sent ▶ OnNet ▶ PickedUp ▶ NetErr ▶ NetWarn
4	Click Ack . System response The system sets the status of the document to “Ack’d.”

Special Considerations for EDIFACT Acknowledgements

Introduction

When creating an outbound EDIFACT Control document, the default system behavior is to extract the Sender ID and Receiver ID from the Internal System User partner. According to the EDIFACT standard, the Sender ID and Receiver ID in the UCI and UCF record of the Control document should contain the values from the Inbound UNB and UNG segment, respectively.

The Gentran:Server product CD (in the Maps\Special directory) contains the translation object CntrlBld_DLL.tpl. This map enables you to obtain the Sender ID and Receiver ID from the inbound data file via a user exit that accesses the GentranAutomation.DLL. The GentranAutomation.DLL is automatically registered when you install or upgrade the product. This DLL is currently only used by the CntrlBld_DLL map.

Note

You can either use either functionality. The default translation object selected for the Outbound Control Build relationship is the ACKBUILD_CONTRL.

Procedure

To use the CntrlBld_DLL.tpl functionality to obtain the Sender ID and Receiver ID, complete the following steps:

Step	Action
1	From the Tools menu, select Partner Editor . System Response The system displays the Partner Editor Dialog Box.
2	Select the Outbound Control Build relationship from the Select a Partner list and click Outbound . System response The system displays the Outbound Relationship Dialog Box for that partner.
3	On the Outbound Relationship dialog box, click Translation . System response The system displays the Outbound Translation Object Dialog Box.
4	From the Import list, select ACKBUILD_CONTRL_DLL . Note The default translation object selected for the Outbound Control Build relationship is the ACKBUILD_CONTRL.
5	Click Save to save your selections and return to the Outbound Relationship dialog box.

Checking for Overdue Acknowledgements

Introduction You can manually check for overdue acknowledgements by using the Overdue Check feature.

Note

You can specify the frequency at which the system will check for overdue acknowledgements (in whole minutes) in the System Configuration program. This allows you to disable or reduce the frequency of overdue acknowledgement checking.

Reference

See How to Change the Frequency of Overdue Acknowledgement Checking in the *Administration Guide* for more information.

Procedure To check for overdue acknowledgements, complete the following steps:

Step	Action
1	<p>From the Commands menu, select Overdue Check.</p> <p>System response The system checks if any interchange, group, or document that requires an acknowledgement is overdue (the system has not received an acknowledgement for it and the specified time to do so has expired). For any overdue interchange, group, or document, the system sets the status to Overdue on the Interchanges Browser.</p> <p>Reference See <i>Viewing Interchanges</i> on page 7 - 10 for more information about using the Interchanges browser.</p>

Using Tracking

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Overview

In this chapter

This chapter describes how to use the Gentran:Server tracking 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, and when it is exported.

Tracking Inbound Information

Introduction For inbound processing, the system may receive an inbound transmission file (such as external data) through the Process File command within Gentran:Server or through a Mailbox message (when the ContentType is configured to Application/EDI). After the file is received by the system, you may either export the file or configure the system to export it automatically.

Process file process When data arrives directly into the system through a Process File command, Commpost performs the following actions to save the information pertaining to this file:

Stage	Description
1	If System Configuration is configured to copy process file data, Commpost copies the file to the External Data directory.
2	Commpost updates the ExtData_tb with a new record containing the type of external data being saved (such as ExtData), a new external data key (after allocating a new one), and other relevant data pertaining to this external data reference.
3	Commpost splits this file into interchanges and creates INT files (interchanges) and IPC files for the Translator.
4	Commpost invokes the Translator, which continues with the inbound process and creates a record in ExtDataXref_tb linking the external data reference to the interchange just created. There is one IPC file for each interchange, and the IPC file passes information to the Translator, including the starting and ending offset indicators in the transmission file for the interchange to which it corresponds and the external data type and key.

This ensures that the system can reference this file (external data) in the event you want to view tracking information or external data.

Note

If you do not configure Gentran:Server to copy external information, the external data viewer is unavailable.

References

See the following for more information:

- *Processing Data Files* on page 5 - 14
- *Exporting Documents* on page 4 - 66
- System Configuration—External Data Tab and the Using Database Tables appendix in the *Administration Guide*

**Mailbox process
file process**

When data enters the system through a mailbox, all associated message identifiers are tracked using the following process:

Stage	Description
1	Your trading partner creates a data file (in which ContentType is set to Application/EDI. An associated message ID is created in the Outbox.
2	Your partner sends it to your Gentran Application Inbox, which creates a new target message ID.
3	The CommMgr (the Gentran:Server Executive service) recognizes the ContentType as Application/EDI. It receives the data and stores the external data reference in the ExtData_tb in the same way as described in the previous section, <i>except</i> that since CommMgr receives the data, it saves this database entry.
4	The CommMgr builds a temporary session file using the GDW_Process_MBFile command for unattended processing to execute, and Process Control invokes Commpost.
5	Commpost builds the IPC file, which includes writing the external data key and the start and end offset indicators in the transmission file for the given interchange.
6	Commpost invokes the Translator for each interchange to finish processing the data, and writes the entry in the ExtDataXref_tb to link the external data reference to the Gentran data.

References

See the following for more information:

- *Using Process Control*, chapter 11 in this guide
- *Communications User's Guide*
- Using Database Tables appendix in the *Administration Guide*

Export process

Data that is exported is already in the system, so the external data that creates the export file is the Translator. Therefore, the Translator stores the tracking information in the database.

Stage	Description
1	The Translator uses the document or documents as input to the export translation object.
2	Depending on the specifications of the translation object, the system generates an export file.
3	The Translator copies the newly generated export file to the External Data folder in the system data store, updates the ExtData_tb with the appropriate information, and updates the ExtDataXref_tb with the external data and associated document information.

References

See the following for more information:

- *Exporting Documents* on page 4 - 66
- Using Database Tables appendix in the *Administration Guide*

Tracking Outbound Information

Introduction For outbound processing, the system can import external data through the Import command within Gentran:Server or through a Mailbox message (when the ContentType is configured to Application/Import). After the file is imported into the system, you can send the file or configure Process Control to send the file automatically. After a send command, a new mailbox message is created and any subsequent send transmissions create a new mailbox message that is related to the same external data file that was initially imported.

Import process Data is imported using the following process:

Stage	Description
1	The external data is imported directly into Gentran:Server. This data is either coming from an unattended process control (GDW_Import) or a manual import.
2	Depending on how the data is imported, either UNATTEND or EDIMGR copies the external data file to the External Data folder in the system data store.
3	UNATTEND or EDIMGR updates the ExtData_tb with an entry that indicates the filename, the date and time from the timestamp on the file, the date and time of the action, and the ExtDataKEY
4	UNATTEND or EDIMGR writes the ExtDataType and ExtDataKEY parameters to the IPC file (they are called "Type" and "Key," respectively, in this file).
5	The Translator executes the import translation object. It obtains the ExtDataType and ExtDataKEY from the IPC file and writes the ExtDataXref_tb entries that link the documents to the external data reference created by EDIMGR or UNATTEND.

References

See the following for more information:

- *Importing Documents* on page 4 - 64
- *Using Process Control* on page 11 - 1
- Using Database Tables appendix in the *Administration Guide*

Mailbox import process

When an external data file is imported using a Collection Mailbox, all the associated message identifiers are tracked by the system according to the following process:

Stage	Description
1	When outbound data flows through the system, the Collection Mailbox creates a data file and an associated message ID in its Outbox (with ContentType set to Application/Import).
2	<p>The Collection Mailbox sends it to your Gentran Application Inbox, creating a new target message ID.</p> <p>Note For a Mailbox Import, you must specify the UNC path and file name on the System Configuration Imports tab. This specification must exactly match the path you set for the TRANSIN directory on the System Configuration Directories tab.</p> <p>References See the following for more information:</p> <ul style="list-style-type: none"> • How to Create a File System Mailbox in the <i>Communications User's Guide</i> • System Configuration—Directories Tab in the <i>Administration Guide</i> • System Configuration—Imports Tab in the <i>Administration Guide</i>
3	The CommMgr recognizes the ContentType as Application/Import and initiates the import of this file.
4	The CommMgr stores the external data reference in the ExtData_tb and then builds the unattended processing session file (with the new GDW_MBImport command) to import the data into Gentran:Server.
5	After the session file is created, unattended processing creates the IPC file and writes the external data information that the Translator needs to perform an import.
6	The Translator runs the import map stores tracking information in the ExtDataXref_tb.

References

See the following for more information:

- *Using Process Control*, chapter 11 in this guide
- *Communications User's Guide*
- Using Database Tables in the *Administration Guide*

Send process After a file has been imported, the Gentran:Server documents that are created can be sent to a Mailbox according to the following process:

Stage	Description
1	The system creates an associated Mailbox message in the Gentran Application mailbox.
2	It sends the message to the partner's mailbox. Like the process file and import actions, the send action has a source and target message ID associated with the external data. However, unlike the other actions, the external data is a message and it is related to an interchange.
3	The links between the interchange that is sent and the Mailbox message to which it is sent are preserved in the ExtDataXref_tb. When you want to view this information, it is available in the External Data Summary Viewer.

Example

In this scenario, the user has selected to send multiple documents in one interchange. After the Translator builds the interchange, the CommMgr sends the interchange to the Mailbox. While the CommMgr is sending the interchange, it receives a message ID for the Mailbox to create a message in the Gentran Application mailbox. Then, it creates an external data reference in the ExtData_tb where the type is Message. Finally, CommMgr has enough information to create a record in the ExtDataXref_tb linking the interchange to the message.

References

See the following for more information:

- *Sending Document* on page 5 - 6
- *Communications User's Guide*
- Using Database Tables in the *Administration Guide*

Viewing and Printing Data Audit Information

Introduction Typically, you view data audit (document tracking information that is available for a single document) to get 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 data audit information, complete the following steps:

Step	Action
1	<p>From the appropriate area of The Desk, select the desired browser.</p> <p>System response If you select the In Documents, ?In Documents, Out Documents, ?Out Documents, In Drawer, or Out Drawer browser, the appropriate summary dialog for that browser is displayed.</p>
2	<p>To access the browser containing those documents, select the type of document for the appropriate partner and click View.</p>
3	<p>Select a single document and select View from the Commands menu.</p> <p>System response The system displays the View Choice Dialog Box.</p>
4	<p>Select Data Audit and click OK.</p> <p>System response The system displays a Document Audit window for that document.</p> <p>Note The Document Audit window contains the audit messages specific to the selected document. The information in this window includes the severity of the message, event ID, event name, audit number, user name, machine name, and message.</p> <p>Reference See Using the Audit Notification System in the <i>Administration Guide</i> for more information.</p>
5	<p>Do you want to print the displayed data audit information?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, from the File menu, select Print. ▶ If <i>no</i>, click Close to exit the Tracking window.

Viewing and Printing Tracking Information

Introduction This function displays information that tracks an external data file. These records can be viewed from any of the document browsers.

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

Step	Action
1	<p>From the appropriate area of The Desk, select the desired browser.</p> <p>System response If you select the In Documents, ?In Documents, Out Documents, ?Out Documents, In Drawer, or Out Drawer browser, the appropriate summary dialog for that browser is displayed.</p>
2	To access the browser containing those documents, select the type of document for the appropriate partner and click View .
3	<p>Select a single document and select View from the Commands menu.</p> <p>System response The system displays the View Choice Dialog Box.</p>
4	<p>Select Tracking Information and click OK.</p> <p>System response The system displays a Tracking Information window for that document.</p> <p>Note The Tracking Information window contains an entry for each set of correlated files. 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>Do you want to print the displayed tracking information?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, from the File menu, select Print. ▶ If <i>no</i>, click Close to exit the Tracking window.

Using Archive and Restore

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Introduction

In this chapter This chapter explains how to use the interactive archive and restore feature of Gentran:Server.

Archive feature The Archive feature provides a record of past interchanges (inbound and outbound), application data, and mailbox messages. This enables you to produce an offline archive data file of interchanges, external data, or mailbox messages with stored parameters (archive definitions) that you define. This archive data file can be stored long-term.

You can also use Gentran:Server Process Control to purge and archive data at predefined intervals.

Reference

See *Using Process Control*, chapter 11 in this guide, for more information about scheduling unattended archive sessions.

Restore feature The Restore feature enables you to reprocess archived data through Gentran:Server. This feature copies data from an archive data file back to the active system. For restored interchanges, you can then view the data in the Restored Interchange browser and reprocess it, if necessary.

When to use archive We recommend that you archive your system data on a weekly basis. Using this feature is critical in large volume operations.

Archiving Data

Overview

Types of data that can be archived

The Archive feature enables you to archive the following types of data:

- Inbound and outbound interchanges (Gentran EDI)
- Mailbox messages (and any corresponding attachments)
- External data

Note

If a document is waiting for acknowledgement processing (acknowledgement generation or reconciliation), you will not be able to archive it until this processing is complete.

Archive definition

You can completely configure the Archive feature by using stored *archive definitions*. An archive definition is a set of archive parameters that you set to specify the exact data that you want the system to archive. The system saves the archive definition file (*.ARD file) so you can execute the same archive process repeatedly without having to define parameters again.

Reference

See *Creating an Archive Definition* on page 10 - 36 for more information.

The archive process

The following table describes the archive process:

Stage	Description								
1	Define the archiving parameters (*.ARD file). The archive parameters available depend on the type of data you are archiving.								
	<table border="1"> <thead> <tr> <th>IF you archive...</th> <th>THEN the available archive parameters are...</th> </tr> </thead> <tbody> <tr> <td>Gentran EDI,</td> <td> <ul style="list-style-type: none"> ▶ partner profile ID ▶ whether the interchange is inbound or outbound ▶ age ▶ processed status ▶ network status ▶ acknowledgement status </td> </tr> <tr> <td>Mailbox messages,</td> <td> <ul style="list-style-type: none"> ▶ mailbox (a particular mailbox or all mailboxes) ▶ location (Inbox, Outbox, or both) ▶ age ▶ status ▶ content type </td> </tr> <tr> <td>external data,</td> <td> <ul style="list-style-type: none"> ▶ action taken ▶ age </td> </tr> </tbody> </table>	IF you archive...	THEN the available archive parameters are...	Gentran EDI,	<ul style="list-style-type: none"> ▶ partner profile ID ▶ whether the interchange is inbound or outbound ▶ age ▶ processed status ▶ network status ▶ acknowledgement status 	Mailbox messages,	<ul style="list-style-type: none"> ▶ mailbox (a particular mailbox or all mailboxes) ▶ location (Inbox, Outbox, or both) ▶ age ▶ status ▶ content type 	external data,	<ul style="list-style-type: none"> ▶ action taken ▶ age
	IF you archive...	THEN the available archive parameters are...							
	Gentran EDI,	<ul style="list-style-type: none"> ▶ partner profile ID ▶ whether the interchange is inbound or outbound ▶ age ▶ processed status ▶ network status ▶ acknowledgement status 							
Mailbox messages,	<ul style="list-style-type: none"> ▶ mailbox (a particular mailbox or all mailboxes) ▶ location (Inbox, Outbox, or both) ▶ age ▶ status ▶ content type 								
external data,	<ul style="list-style-type: none"> ▶ action taken ▶ age 								
Execute the archive process, which creates the archive files (*.ARV) in the Archive folder.									
	<p>Note This definition can be run interactively or on a scheduled basis via Process Control.</p> <p>Reference See <i>Using Process Control</i>, chapter 11 in this guide, for more information about scheduling the archive process.</p>								
3	In the archive process, the system copies (or removes) data both from the database tables and the system data store.								

Archive Manager

Introduction The Archive Manager is the facility through which you archive and restore data. The Archive Manager enables you to view the following.

- archive definition files
- summary data about the control information that was archived
- the detailed contents of the data stored in the archive data file

Notes

- When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
- You can sort the Archive tree by filename or by date/time.

The Archive Manager also provides you with a search facility that enables you to quickly define search parameters that are used to find a specific piece of information. The system displays the matching results in the How to Archive Data. You can then select the desired information and the system highlights it in the Archive Manager tree view.

Archive information available to view

The Archive Manager retains extensive data for the information you archive and enables you to easily view it.

Reference

See *Viewing Archived Data* on page 10 - 39 for more information.

The Archive Manager user interface uses a tree structure that displays the hierarchical levels of the archived data. This table lists the information available for each level of the Archive entry for Gentran EDI, Mailbox, and External Data.

Note

N/A indicates that the item is a graphical placeholder used only to illustrate the type of data that was archived.

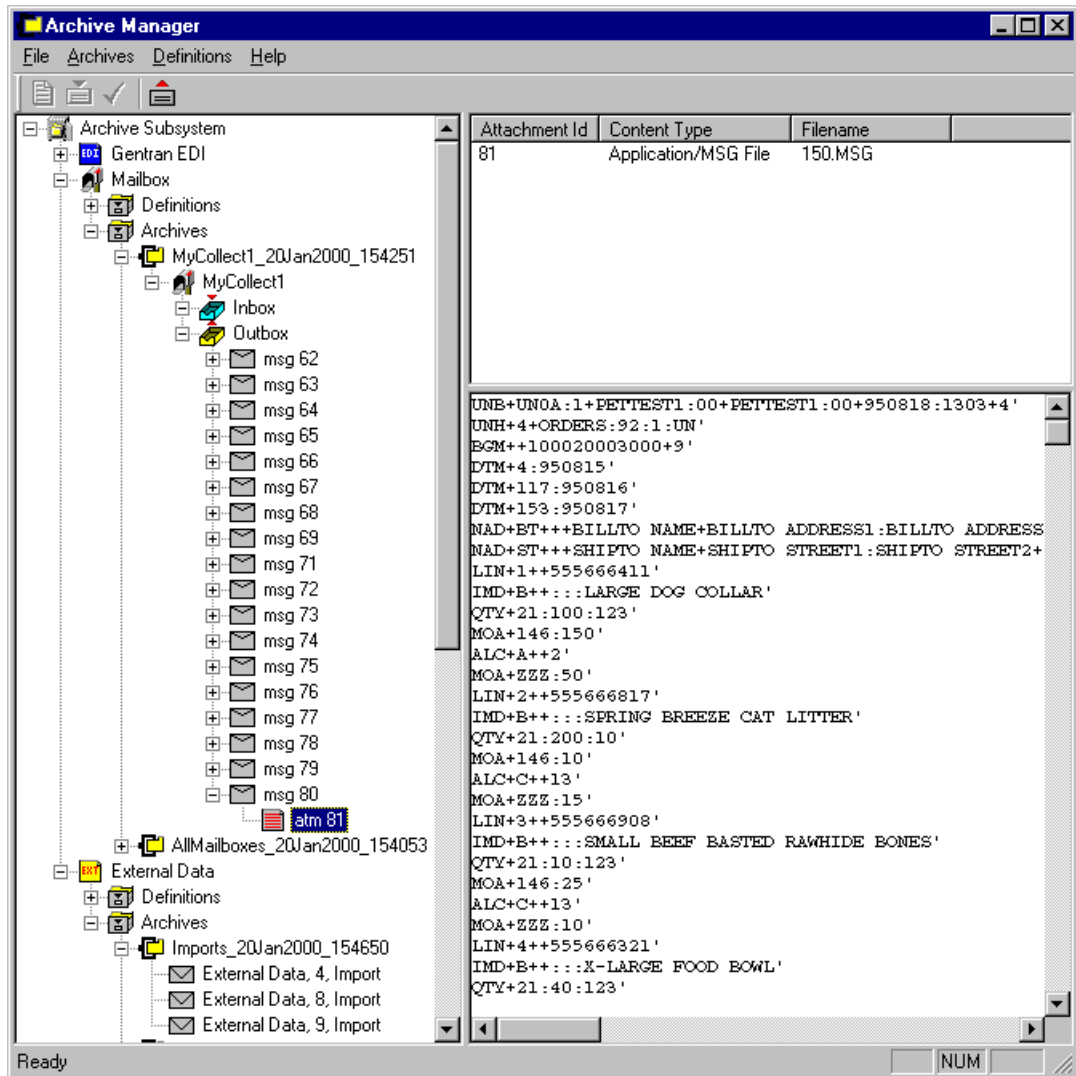
IF you select the...	THEN you can view...
archive file at the Gentran EDI, Mailbox, or External Data level	summary information, including the following: <ul style="list-style-type: none"> • date and time the archive started • date and time the archive ended • number of items archived • number of items deleted (if any) (Continued on next page)

IF you select the...	THEN you can view...
interchange	summary information, including the following: <ul style="list-style-type: none"> • partner profile ID • direction • date and time • interchange control number
	data audit
	tracking information
group	summary information, including the following: <ul style="list-style-type: none"> • group control number • functional group ID • group control key
document	summary information, including the following: <ul style="list-style-type: none"> • transaction ID • transaction control number • document name
	data audit
	tracking information
mailbox	N/A
Inbox/Outbox	N/A
message	summary information, including the following: <ul style="list-style-type: none"> • series ID • message ID • source ID • content type • sender ID/recipient ID • sender name/recipient name • sender mailbox E-mail/recipient mailbox E-mail • subject • status • time message created
	data audits

(Continued on next page)

IF you select the...	THEN you can view...
attachment	summary information, including the following: <ul style="list-style-type: none"> • attachment ID • content type • filename
	data audits
	file, which is viewed either in an external viewer (the default viewer is Notepad) or on screen in the Archive Manager. <p>Note When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.</p>
external data	any one of the following: <ul style="list-style-type: none"> • external data type • external data key • action • date and time of action • original filename
	data audits
Upper-right pane	any one of the following, depending on the level and type of the selection: <ul style="list-style-type: none"> • file information (start, end, number of items archived, and if any items were deleted) • interchange information • group information • document information • message information • attachment information • external data information • data audit information • tracking information
Lower-right pane	the content of the selected attachment.





Diagram The following illustrates the Archive Manager, shown with the Archive tree expanded and a Mailbox message selected:



Parts and functions

The following lists the parts of the Archive Manager and their functions:

Part	Function
File menu	Exit Archive Manager.

Part	Function
Archives menu	Contains the following options: <ul style="list-style-type: none"> • Restore data. • Mark data for restoration (single item or all items). • Unmark data (single item or all items). • Refresh (archive-level). • View data audits at the interchange, document message, or external data level. • View data audits and data at the interchange, document, attachment, or external data level. • Delete archive files. • Search for specific archived data. • Select how you want the Archive data sorted.
Definitions menu	Contains the following options: <ul style="list-style-type: none"> • Create new archive definition. • Edit or delete archive definition. • Archive data.
Help menu	Access Archive Help and information about the Archive Manager.
	Create new archive definition.
	Archive data.
	Mark selected item to be restored to the system.
	Restore marked data to the system.
Left pane	Archive, view, and restore data. (Continued on next page)

Part	Function
Upper right pane	The display depends on the level and type of the selection, but may contain any one of the following: <ul style="list-style-type: none">• file information (start, end, number of items archived, and if any items were deleted)• interchange information• group information• document information• message information• attachment information• external data information• data audit information• tracking information
Lower right pane	Displays the content of the selected interchange, document, attachment, or external data file.

Gentran EDI Archive Definition Dialog Box

Diagram The following illustrates the Gentran EDI Archive Definition dialog box:

The screenshot shows a dialog box titled "Gentran EDI Archive Definition". At the top, there is a "Name:" label followed by an empty text input field. Below this is a checkbox labeled "Delete Data After Archive". A section titled "Selection Criteria" contains three buttons: "Add", "Edit", and "Delete". Underneath these buttons is a table with the following columns: "Partner", "Direction", "Days Old", "Processed Status", "Network Status", "Acknowledgement Status", and "Overdue groups and Interchanges". The table body is currently empty. At the bottom of the dialog box are three buttons: "Save", "Cancel", and "Help".

Parts and functions

The following lists the parts of the Gentran EDI Archive Definition dialog box and their functions:

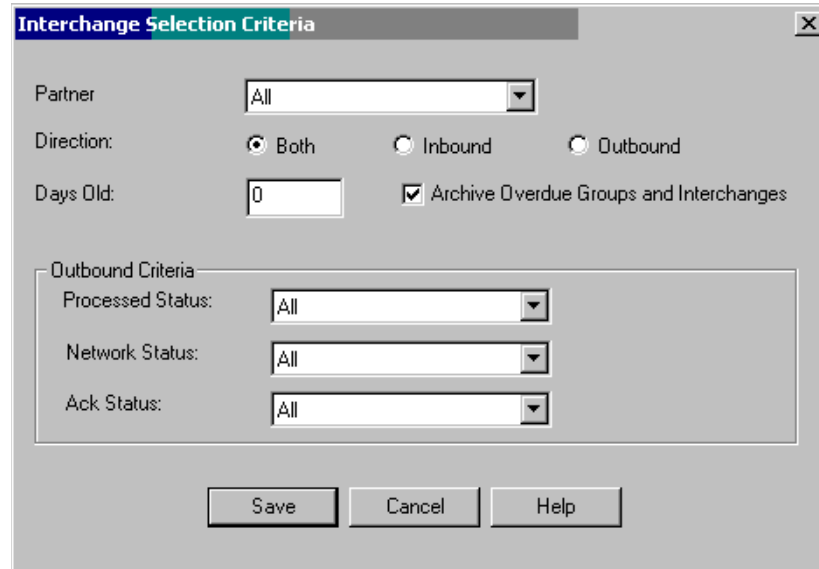
Part	Function
Name	Specify the name of the archive definition file. Note This name must be unique.
Delete Data After Archive	Tell the system to remove the interchange data after archiving it.
Add	Accesses the Mailbox Selection Criteria Dialog Box and enables you to define new archive criteria.
Edit	Accesses the Mailbox Selection Criteria Dialog Box for the selected criteria and enables you to modify the archive criteria.

(Continued on next page)

Part	Function
Delete	Deletes the selected Gentran EDI criteria from the system. Warning The system removes the criteria without prompting you to confirm the deletion.
Partner	Displays the partner profile ID.
Direction	Displays the direction of the interchanges.
Days Old	Displays the age of the interchanges.
Processed Status	Displays the processed status of the interchanges. The default is All.
Network Status	Displays the network status of the interchanges. The default selection is All.
Acknowledgement Status	Displays the acknowledgement status of the interchanges. The default is All.
Overdue groups and Interchanges	Displays whether overdue groups and interchanges are archived. The default is No.
Save	Saves the archive definition and exits the Gentran EDI Archive Definition dialog box.
Cancel	Exits the Gentran EDI Archive Definition dialog box.
Help	Accesses Online Help.

Interchange Selection Criteria Dialog Box

Diagram The following illustrates the Interchange Selection Criteria dialog box:



Parts and functions The following lists the parts of the Interchange Selection Criteria dialog box and their functions:

Part	Function
Partner	Select a partner profile ID (default is All).
Direction	Choose Both (inbound and outbound), Inbound, or Outbound.
Days old	Specify the age (in days) of the interchanges to be archived.
Archive Overdue Groups and Interchanges	Specify whether overdue groups and interchanges are archived. The default is No. If selected, the system behavior prior to the implementation of Deferred Acknowledgements is implemented where overdue groups and interchanges are archived if the user selects “All” or “ReconcileOverdue” for the acknowledgement status and the direction is “Both” or “Outbound.” If this checkbox is not selected, outbound overdue groups and interchanges are not archived. (Continued on next page)

Part	Function
Processed Status	Select the processed status of the interchanges that are to be archived. Valid values: <ul style="list-style-type: none"> • All (default) • Received • Sent • ReadyToSend • Queued • Held • SendFailed
Network Status	Select the network status of the interchanges that are to be archived. Valid values: <ul style="list-style-type: none"> • All (default) • NotSent • ReceivedOK • ReceivedWarning • ReceivedError • PickedUp • ThirdParty
Ack Status	Select the acknowledgement status of the interchanges that are to be archived. Valid values: <ul style="list-style-type: none"> • All (default) • ReconcileNotRequired • ReconcileWaiting • ReconciledOK • ReconciledErrors • ReconciledPartial • ReconciledReject • ReconcileOverdue
Save	Saves the selection criteria and exits the Interchange Selection Criteria dialog box.
Cancel	Exits the Interchange Selection Criteria dialog box.
Help	Accesses Online Help.

Interchange Search Dialog Box

Diagram The following illustrates the Interchange Search dialog box:

Parts and functions The following lists the parts of the Interchange Search dialog box and their functions:

Part	Function
Partner	Select a partner profile ID (default is All).
Direction	Choose Both (inbound and outbound), Inbound, or Outbound.
Control No.	Specify a control number.
Received Between	Define a range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format) for received interchanges.

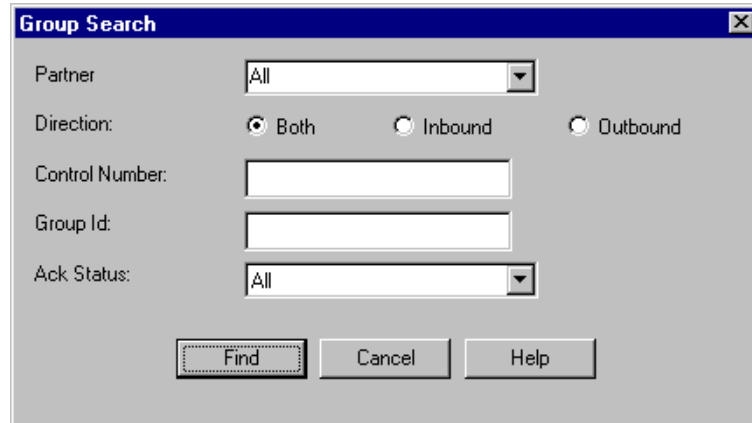
(Continued on next page)

Part	Function
Processed Status	Select the processed status of the interchanges to search for. Valid values: <ul style="list-style-type: none"> • All (default) • Received • Sent • ReadyToSend • Queued • Held • SendFailed
Network Status	Select the network status of the interchanges to search for. Valid values: <ul style="list-style-type: none"> • All (default) • NotSent • ReceivedOK • ReceivedWarning • ReceivedError • PickedUp • ThirdParty
Ack Status	Select the acknowledgement status of the interchanges to search for. Valid values: <ul style="list-style-type: none"> • All (default) • ReconcileNotRequired • ReconcileWaiting • ReconciledOK • ReconciledError • ReconciledPartial • ReconciledReject • ReconcileOverdue
Sent Between	Define a range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format) for sent interchanges. <p>Note Click the arrow to access the calendar control.</p> <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Find	Finds the appropriate interchanges based on the criteria you selected and displays them in the Search Results Dialog Box.
Cancel	Exits the dialog box.
Help	Accesses Online Help.

Group Search Dialog Box

Diagram The following illustrates the Group Search dialog box:



Parts and functions

The following lists the parts of the Group Search dialog box and their functions:

Part	Function
Partner	Select a partner profile ID (default is All).
Direction	Choose Both (inbound and outbound), Inbound, or Outbound.
Control No.	Specify control number.
Group ID	Specify group identifier.
Ack Status	Select the acknowledgement status of the groups to search for. Valid values: <ul style="list-style-type: none"> • All (default) • ReconcileNotRequired • ReconcileWaiting • ReconciledOK • ReconciledErrors • ReconciledPartial • ReconciledReject • ReconcileOverdue

(Continued on next page)

Part	Function
Find	Finds the appropriate groups based on the criteria you selected and displays them in the Search Results Dialog Box.
Cancel	Exits the dialog box.
Help	Accesses Online Help.

Document Search Dialog Box

Diagram The following illustrates the Document Search dialog box:

Parts and functions

The following lists the parts of the Document Search dialog box and their functions:

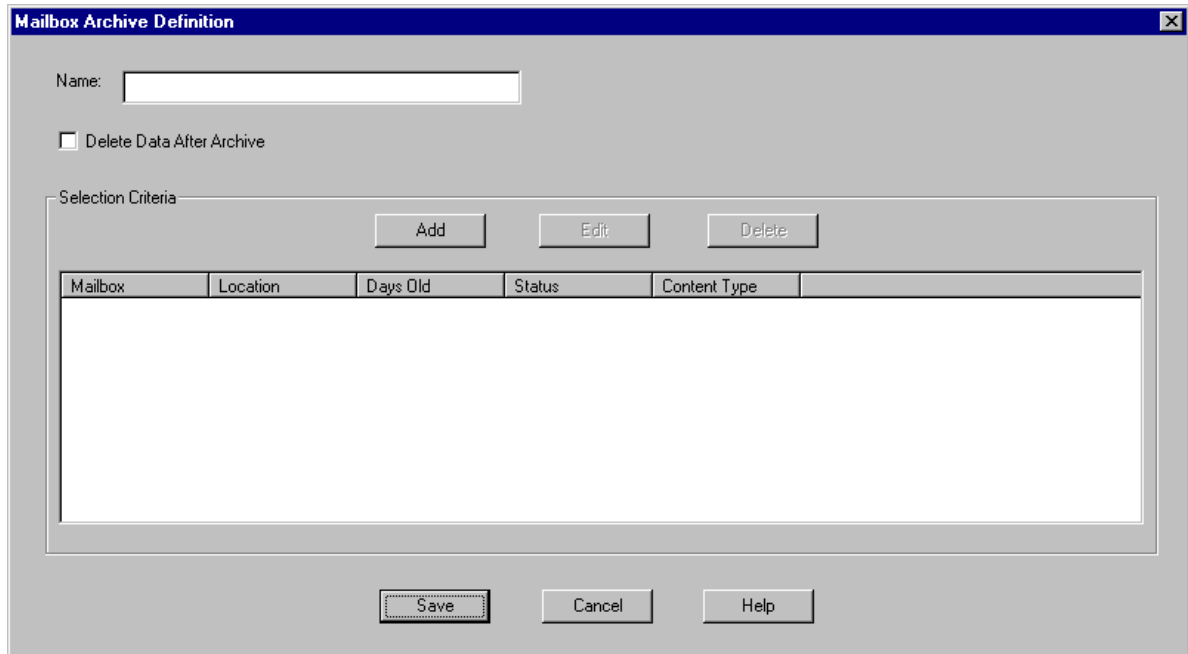
Part	Function
Partner	Select a partner profile ID (default is All).
Direction	Choose both (inbound and outbound), Inbound, or Outbound.
Control Number	Specify a control number.
Trans ID	Specify a transaction identifier.
Ref Data	Specify the reference data from the translation object.
Document Name	Specify the document name established for the translation object.

(Continued on next page)

Part	Function
Ack Status	Select the acknowledgement status of the documents to search for. Valid values: <ul style="list-style-type: none">• All (default)• Received• ReconcileWaiting• ReconciledOK• ReconciledErrors• ReconciledPartial• ReconciledReject• ReconcileOverdue
Exact Match	Searches for an exact match of the field, instead of a partial match (the default).
Find	Finds the appropriate documents based on the criteria you selected and displays them in the Search Results Dialog Box.
Cancel	Exits the dialog box.
Help	Accesses Online Help.

Mailbox Archive Definition Dialog Box

Diagram The following illustrates the Mailbox Archive Definition dialog box:



Parts and functions

The following lists the parts of the Mailbox Archive Definition dialog box and their functions:

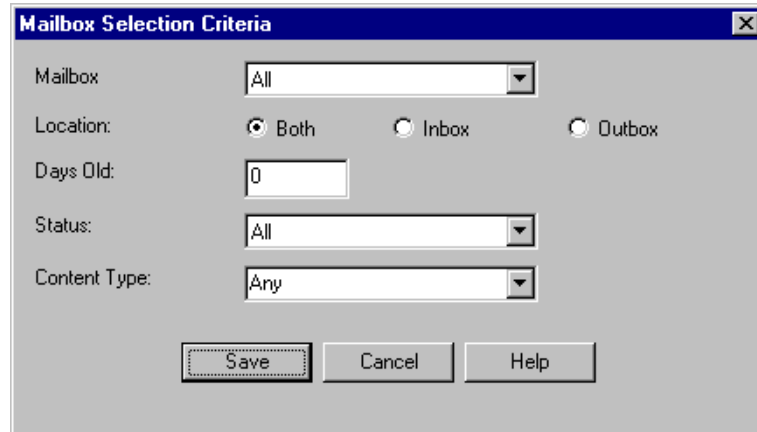
Part	Function
Name	Specify the name of the archive definition file. Note This name must be unique.
Delete Data After Archive	Tell the system to remove the message data after archiving it.
Add	Accesses the Mailbox Selection Criteria Dialog Box and enables you to define new archive criteria.
Edit	Accesses the Mailbox Selection Criteria Dialog Box for the selected mailbox criteria and enables you to modify the archive criteria.

(Continued on next page)

Part	Function
Delete	Deletes the selected mailbox criteria from the system. Warning The system removes the criteria without prompting you to confirm the deletion.
Mailbox	Displays the mailbox name.
Location	Displays the location of the messages.
Days Old	Displays the age (in days) of the messages to be archived.
Status	Displays the status of the messages that are to be archived. The default is All.
Content type	Displays the content type of the messages. The default selection is Any.
Save	Saves the archive definition and exits the Mailbox Archive Definition dialog box.
Cancel	Exits the Mailbox Archive Definition dialog box.
Help	Accesses Online Help.

Mailbox Selection Criteria Dialog Box

Diagram The following illustrates the Mailbox Selection Criteria dialog box:



Parts and functions

The following lists the parts of the Mailbox Selection Criteria dialog box and their functions:

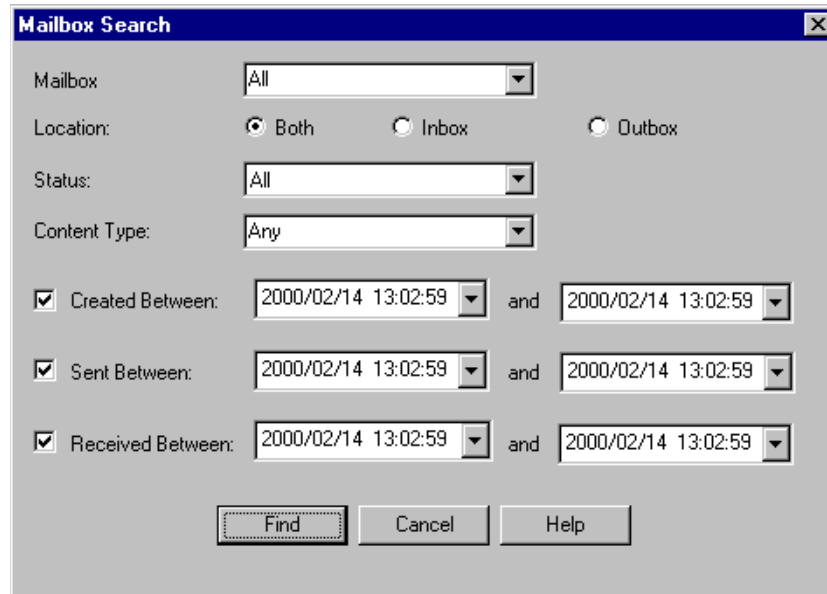
Part	Function
Mailbox	Select a mailbox (default All).
Location	Choose Both (Inbox and Outbox), Inbox, or Outbox.
Days old	Specify the age (in days) of the messages to be archived.
Status	Select the status of the messages that are to be archived. Valid values: <ul style="list-style-type: none"> • All (default) • Delivered • Picked Up • Read • Sent • Sent Third Party

(Continued on next page)

Part	Function
Content type	Select the content type of the messages. Valid values: <ul style="list-style-type: none">• Any (default)• Application/EDI• Application/Document-EDI• Application/Import• Application/rosettanet-agent (only if Gentran:Server for RosettaNet is installed) <p>Note This edit box allows you to enter any content type you created.</p>
Save	Saves the selection criteria and exits the Mailbox Selection Criteria dialog box.
Cancel	Exits the Mailbox Selection Criteria dialog box.
Help	Accesses Online Help.

Mailbox Search Dialog Box

Diagram The following illustrates the Mailbox Search dialog box:



Parts and functions

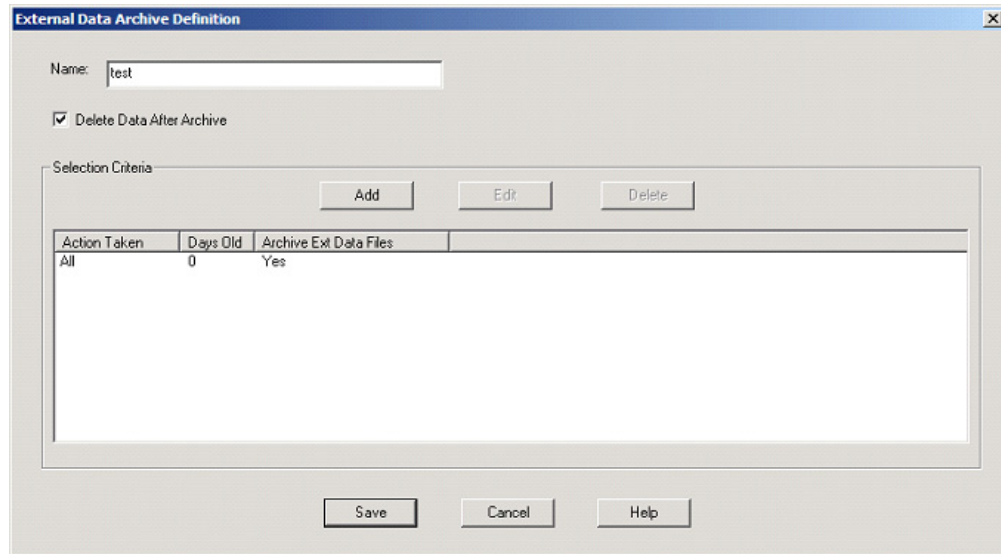
The following lists the parts of the Mailbox Search dialog box and their functions:

Part	Function
Mailbox	Select a mailbox (default is All).
Location	Choose Both (Inbox and Outbox), Inbox, or Outbox
Status	Select the status of the messages to be archived. Valid values: <ul style="list-style-type: none"> • All (default) • Sent • Read • Delivered • Picked Up • Sent Third Party
Content type	Select the content type of the messages. The default is Any, but you can type in any content type you have created. <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Created Between	Define a created between range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format). Note Click the arrow to access the calendar control.
Sent Between	Define a sent between range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format). Note Click the arrow to access the calendar control.
Received Between	Define a received between range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format). Note Click the arrow to access the calendar control.
Find	Finds the appropriate messages based on the criteria you selected and displays them in the Search Results Dialog Box.
Cancel	Exits the Mailbox Search dialog box.
Help	Accesses Online Help.

External Data Archive Definition Dialog Box

Diagram The following illustrates the External Data Archive Definition dialog box:



Parts and functions

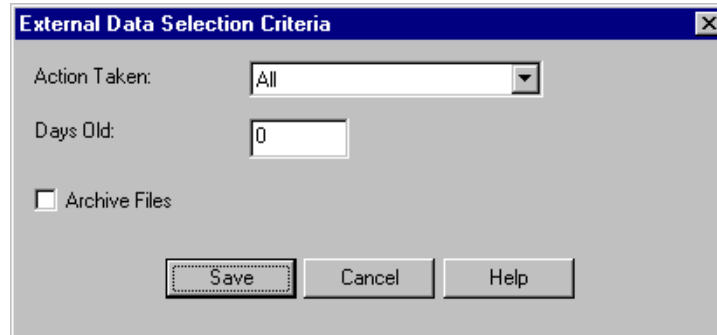
The following lists the parts of the External Data Archive Definition dialog box and their functions:

Part	Function
Name	Specify the name of the archive definition file. Note This name must be unique.
Delete Data After Archive	Tell the system to remove the message data after archiving it. This is selected by default.
Add	Accesses the External Data Selection Criteria Dialog Box and enables you to define new archive criteria.
Edit	Accesses the External Data Selection Criteria Dialog Box for the selected mailbox criteria and enables you to modify the archive criteria. (Continued on next page)

Part	Function
Delete	<p>Deletes the selected external data criteria from the system.</p> <p>Warning The system removes the criteria without prompting you to confirm the deletion.</p>
Action Taken	<p>Displays the action taken on the external data file. Value values:</p> <ul style="list-style-type: none"> • All (default value) • ProcessFile • MBProcessFile • Import • MBImport • Send • Export
Days old	Displays the age (in days) of the external data files to be archived.
Archive Ext Data Files	Displays the archived external data files.
Save	Saves the archive definition and exits the External Data Archive Definition dialog box.
Cancel	Exits the External Data Archive Definition dialog box.
Help	Accesses Online Help.

External Data Selection Criteria Dialog Box

Diagram The following illustrates the External Data Selection Criteria dialog box:

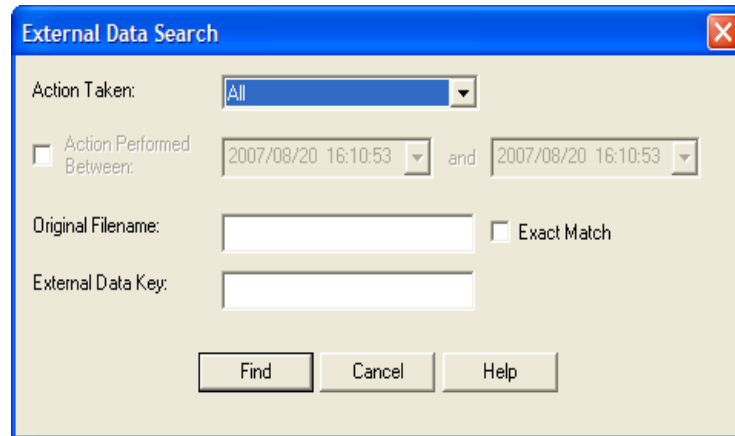


Parts and functions The following lists the parts of the External Data Selection Criteria dialog box and their functions:

Part	Function
Action Taken	Select the action to be taken on the external data file. Value values: <ul style="list-style-type: none"> • All (default value) • ProcessFile • MBProcessFile • Import • MBImport • Send • Export
Days old	Specify the age (in days) of the external data files to be archived.
Archive Files	Indicate that the external data files will be archived.
Save	Saves the selection criteria and exits the External Data Selection Criteria dialog box.
Cancel	Exits the External Data Selection Criteria dialog box.
Help	Accesses Online Help.

External Data Search Dialog Box

Diagram The following illustrates the External Data Search dialog box:



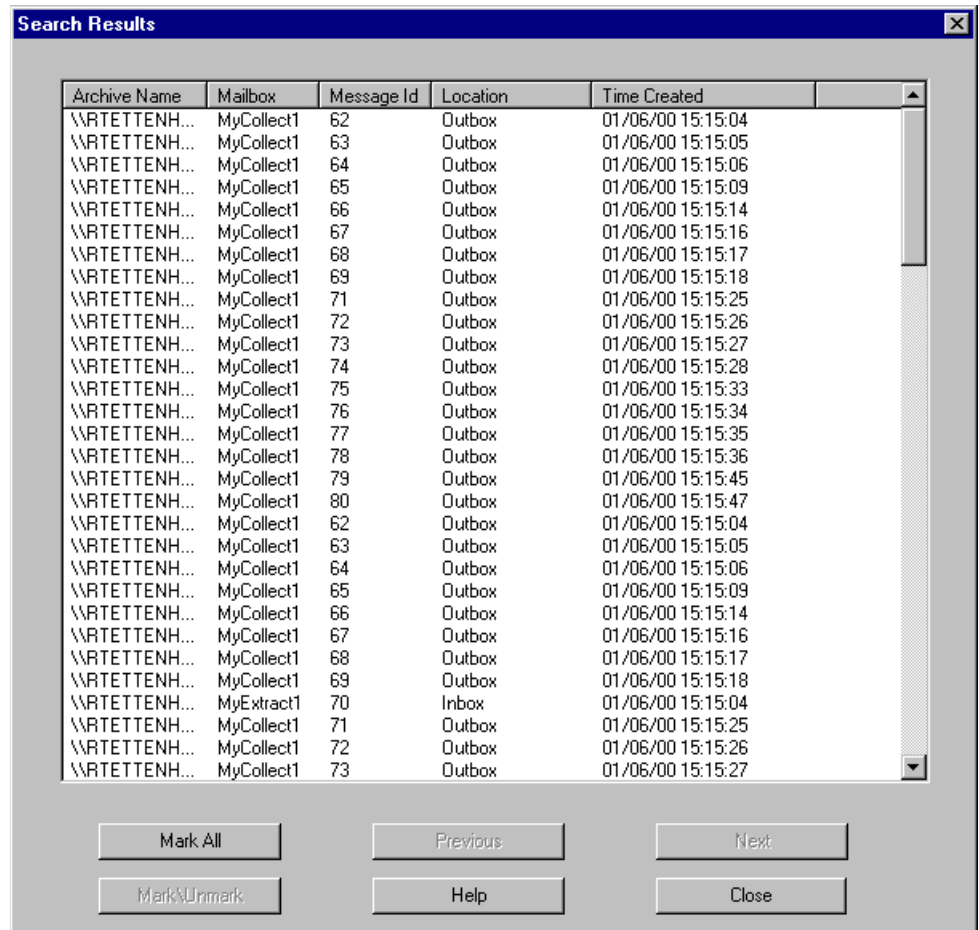
Parts and functions The following lists the parts of the External Data Search dialog box and their functions:

Part	Function
Action Taken	Select the action to be taken on the external data file for which to search. Value values: <ul style="list-style-type: none"> • All (default) • ProcessFile • MBProcessFile • Import • MBImport • Send • Export
Action Performed Between	Define a range of dates and times on which to search, defining when the action was performed on the external data file (in YYYY/MM/DD and HH:MM:SS format). <p>Note Click the arrow to access the calendar control.</p>
Original Filename	Specify the original name of the external data file for which to search. <p style="text-align: right;">(Continued on next page)</p>

Part	Function
External Data Key	Specify the external data key for which to search.
Exact Match	Searches for an exact match of the field, instead of a partial match (the default).
Find	Finds the appropriate messages based on the criteria you selected and displays them in the Search Results Dialog Box.
Cancel	Exits the External Data Search dialog box.
Help	Accesses Online Help.

Search Results Dialog Box

Diagram The following illustrates the Search Results dialog box, illustrating the result of a search performed on archived mailbox messages:



Parts and functions

The following lists the parts of the Search Results dialog box and their functions:

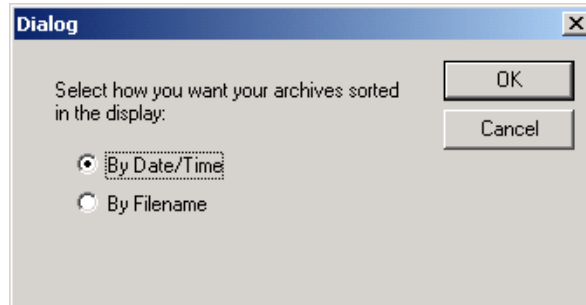
Part	Function
(list)	Displays context-specific information, depending on whether you searched for interchanges, groups, documents, messages, or external data.
Mark All	Marks all items in the Search Results dialog box to be restored.

(Continued on next page)

Part	Function
Previous	Selects the previous item in the list. Note This button is only enabled if you select an archive file.
Next	Selects the next item in the list. Note This button is only enabled if you select an archive file.
Mark/Unmark	Flags the selected item to be restored (or deselect a previously selected item). Note This toggle button is only enabled if you select an archive file.
Help	Accesses Online Help.
Close	Exits Search Results dialog box.

Sort Preferences Dialog Box

Diagram The following illustrates the Sort Preferences dialog box, which enables you to select how you want the archive data sorted in the Archive tree view:



How to access Select **Preferences** from the **Archive** menu.

Parts and functions The following lists the parts of the Sort Preferences dialog box and their functions:

Part	Function
Select how you want your archives sorted in the display	Select one of the following methods of sort order: <ul style="list-style-type: none"> • Date/Time • Filename
OK	Implements the selected sort order and exits the dialog box.
Cancel	Exits the dialog box without changing the sort order.

Creating an Archive Definition

Procedure To create an archive definition file, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select Archive . System response The system displays the Archive Manager.
2	Expand the Archive tree. Note This is necessary to create a new archive definition.
3	Right-click Definitions under Gentran EDI, Mailbox, or External Data, and select New from the shortcut menu to define archive parameters. System response The system displays the Gentran EDI Archive Definition Dialog Box, the Mailbox Archive Definition Dialog Box, or the External Data Archive Definition Dialog Box.
4	In the Name box, type the name of the archive definition.
5	Do you want the system to remove the data from the Gentran:Server system after archiving it? <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the Delete Data After Archive check box and continue with the next step. ▶ If <i>no</i>, continue with the next step.
6	Click Add . System response The system displays the appropriate Selection Criteria dialog box. (Continued on next page)

Step	Action						
7	<p>Complete the appropriate parameters.</p> <p>References See the following for more information:</p> <ul style="list-style-type: none"> ▶ <i>Interchange Selection Criteria Dialog Box</i> on page 10 - 13 ▶ <i>Mailbox Selection Criteria Dialog Box</i> on page 10 - 24 ▶ <i>External Data Selection Criteria Dialog Box</i> on page 10 - 30 <p>Note All elements on the Selection Criteria dialog boxes are automatically set to the defaults, which results in the archival of all data.</p>						
8	<p>Click Save.</p> <p>System response The system exits the Selection Criteria dialog box.</p>						
9	<p>Do you want to create additional archive criteria?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, repeat Steps 6 through 8. ▶ If <i>no</i>, continue with the next step. 						
10	<p>Click Save on the appropriate Archive Definition dialog box.</p> <p>System response The system creates an archive definition file that contains the archive parameters. The definition file is stored with an .ARD extension.</p>						
11	Use this table to determine your next step.						
	<table border="1"> <thead> <tr> <th data-bbox="609 1329 987 1394">IF you want to...</th> <th data-bbox="987 1329 1427 1394">THEN...</th> </tr> </thead> <tbody> <tr> <td data-bbox="609 1394 987 1524">edit the archive criteria,</td> <td data-bbox="987 1394 1427 1524">select the appropriate item on the appropriate Archive Definition dialog box and click Edit.</td> </tr> <tr> <td data-bbox="609 1524 987 1648">delete archive criteria,</td> <td data-bbox="987 1524 1427 1648">select the appropriate item on the appropriate Archive Definition dialog box and click Delete.</td> </tr> </tbody> </table>	IF you want to...	THEN...	edit the archive criteria,	select the appropriate item on the appropriate Archive Definition dialog box and click Edit .	delete archive criteria,	select the appropriate item on the appropriate Archive Definition dialog box and click Delete .
	IF you want to...	THEN...					
edit the archive criteria,	select the appropriate item on the appropriate Archive Definition dialog box and click Edit .						
delete archive criteria,	select the appropriate item on the appropriate Archive Definition dialog box and click Delete .						

Archiving Data

Before you begin Before archiving data, you must create an archive definition file that contains your selection criteria.

Reference

See *Creating an Archive Definition* on page 10 - 36 for more information.

Procedure To archive data, complete the following steps:

Step	Action
1	Use your company's computer backup process to back up the Gentran:Server system before executing the archive process.
2	From the appropriate area of The Desk, select Archive . System response The system displays the Archive Manager.
3	Expand the archive tree and open the appropriate Definitions folder.
4	Right-click the appropriate archive definition and select Archive Data from the shortcut menu. System response <ul style="list-style-type: none"> • The system executes the archive process. An interactive progress dialog box displays the current state of the archive process and enables you to cancel the archive, if necessary. • The system archives the data by the parameters you specified and creating a new file in the Archives folder. Naming convention The system naming convention for creating the archive files uses the same name of the archive definition file, plus the unique date and time of archival, with an .ARV file extension.
5	When the archive process is complete, right-click the appropriate Archive folder in the Archive Manager tree view and select Refresh . System response The system displays the archive file along with the date and time on which the archive data file was created.

Viewing Archived Data

Procedure To view archived information, complete the following steps:

Step	Action						
1	<p>From the appropriate area of The Desk, select Archive.</p> <p>System response The system displays the Archive Manager.</p>						
2	Expand the archive tree and open the appropriate Archives folder.						
3	<p>In the Archive folder, locate the archive data file for which you want to view the contents (summary or detailed) or search for a specific piece of data, and click the “+” to the left of that file.</p> <p>System response The system displays the archived files. When you select an archive file, the system displays summary information for each item.</p> <p>Reference See <i>Archive Manager</i> on page 10 - 5 for details about the information available at each level.</p>						
4	Select Preferences from the Archive menu, choose how you want your archive data sorted in the Archive tree view, and click OK .						
5	<p>To view additional information, select the appropriate level of the tree and use the following table to determine your next action.</p> <p>Note N/A indicates that the information that the system displays when you selected the specified item.</p> <table border="1"> <thead> <tr> <th>IF you want to view the...</th> <th>THEN perform this action...</th> </tr> </thead> <tbody> <tr> <td>archive file information (displayed in the Archive Manager, upper-right pane)</td> <td>select the archive file.</td> </tr> <tr> <td>interchange information (displayed in the Archive Manager, upper-right pane)</td> <td>select the interchange.</td> </tr> </tbody> </table> <p style="text-align: right;">(Continued on next page)</p>	IF you want to view the...	THEN perform this action...	archive file information (displayed in the Archive Manager, upper-right pane)	select the archive file .	interchange information (displayed in the Archive Manager, upper-right pane)	select the interchange .
IF you want to view the...	THEN perform this action...						
archive file information (displayed in the Archive Manager, upper-right pane)	select the archive file .						
interchange information (displayed in the Archive Manager, upper-right pane)	select the interchange .						

Step	Action	
5 (contd)	interchange data audit (displayed in the Archive Manager, upper-right pane)	<ul style="list-style-type: none"> ▶ right-click the interchange and ▶ select View\Data Audits from the shortcut menu.
	interchange tracking information (displayed in the Archive Manager, upper-right pane)	<ul style="list-style-type: none"> ▶ right-click the interchange and ▶ select View\Tracking Info from the shortcut menu.
	interchange file (displayed in an external viewer)	<ul style="list-style-type: none"> ▶ right-click the interchange and ▶ select View\Data\External Viewer from the shortcut menu.
	interchange file (displayed in the Archive Manager, lower-right pane)	<ul style="list-style-type: none"> ▶ right-click the interchange and ▶ select View\Data\Screen from the shortcut menu.
	group information (displayed in the Archive Manager, upper-right pane)	select the group .
	document information (displayed in the Archive Manager, upper-right pane)	select the document .
	document data audit (displayed in the Archive Manager, upper-right pane)	<ul style="list-style-type: none"> ▶ right-click the document and ▶ select View\Data Audits from the shortcut menu.
	document tracking information (displayed in the Archive Manager, upper-right pane)	<ul style="list-style-type: none"> ▶ right-click the document and ▶ select View\Tracking Info from the shortcut menu.
	document file (displayed in an external viewer)	<ul style="list-style-type: none"> ▶ right-click the document and ▶ select View\Data\External Viewer from the shortcut menu.
	document file (displayed in the Archive Manager, lower-right pane)	<ul style="list-style-type: none"> ▶ right-click the document and ▶ select View\Data\Screen from the shortcut menu. <p style="text-align: right;">(Continued on next page)</p>

Step	Action	
5 (contd)	message information (displayed in the Archive Manager, upper-right pane)	select the message .
	message data audit (displayed in the Archive Manager, upper-right pane)	<ul style="list-style-type: none"> ▶ right-click the message and ▶ select View\Data Audits from the shortcut menu.
	attachment information (displayed in the Archive Manager, upper-right pane)	select the attachment .
	attachment data audit (displayed in the Archive Manager, upper-right pane)	<ul style="list-style-type: none"> ▶ right-click the attachment and ▶ select View\Data Audits from the shortcut menu.
	attachment file (displayed in an external viewer)	<ul style="list-style-type: none"> ▶ right-click the attachment and ▶ select View\Data\External Viewer from the shortcut menu.
	attachment file (displayed in the Archive Manager, lower-right pane)	<ul style="list-style-type: none"> ▶ right-click the attachment and ▶ select View\Data\Screen from the shortcut menu.
	external data information (displayed in the Archive Manager, upper-right pane)	select the external data file .
	external data audit (displayed in the Archive Manager, upper-right pane)	<ul style="list-style-type: none"> ▶ right-click the external data file and ▶ select View\Data Audits from the shortcut menu.
	external data file (displayed in an external viewer)	<ul style="list-style-type: none"> ▶ right-click the external data file and ▶ select View\Data\External Viewer from the shortcut menu. <p style="text-align: right;">(Continued on next page)</p>

Step	Action	
5 (contd)	external data file (displayed in the Archive Manager, lower-right pane)	<ul style="list-style-type: none">▶ right-click the external data file and▶ select View\Data\Screen from the shortcut menu.
System response The system displays the information you requested.		

Searching Archived Data

Introduction The Archive Manager Search facility enables you to quickly define parameters that are used to search all archive files or one archive file and find a specific piece of information. You can then select the desired information, and the system highlights it in the Archive Manager tree view.

Procedure To search for a specific piece of archived data, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select Archive . System response The system displays the Archive Manager.
2	From the Archive Subsystem tree, select the appropriate (Gentran EDI, Mailbox, or External Data) Archives folder.
3	From the Archives menu, select Search and then select one of the following: <ul style="list-style-type: none"> ▶ Message ▶ Interchange ▶ Group ▶ Document ▶ External Data System response The system displays the appropriate Search Dialog Box.
4	Select the appropriate parameters. Note If you do not change any parameters on a search dialog box, the system finds the default (all items).
5	Click Find to execute the search. System response The system displays the Search Results Dialog Box. Reference See <i>Archiving Data</i> on page 10 - 38 for more information about the actions you can perform on the Search dialog box.
6	Click Close to exit the Search Results dialog box.

Restoring Archived Data

Overview

Restore feature

The Restore feature enables you to view and reprocess data via the Restored Interchanges browser. When data is restored, the archive data file (*.ARV file) is not altered. You can restore data from the same archive file again, if you wish.

Restore caveats

To restore data to your system, the following must be true:

- The item must have been deleted after it was archived.
- For message data, the original mailbox must still exist on your system.

Note

If the original mailbox does not exist, Archive Manager attempts to recreate it. This facsimile mailbox does not contain all the properties of the original one.

Reference

See *Creating an Archive Definition* on page 10 - 36 for more information about the post-archive delete function.

Moving archive files to tape

As the number of archive data files created by the Archive function increases and corresponding disk space is used, you may determine that you want to move archive data files to tape.

Note

Copying archive files to tape is not part of the Gentran:Server functionality. If you move an archive file to tape, the Archive Search facility is no longer aware of the existence of the file. Files that are moved to tape cannot be viewed while on tape. However, if you reload an archive file from tape to the Archives folder, you can once again view the data via the Archive Manager.

Recommendation

Use some type of tape management system to track the archive files saved to tape.

Procedure To restore archived data, complete the following steps:

Step	Action	
1	From the appropriate area of The Desk, select Archive . System response The system displays the Archive Manager.	
2	Expand the archive tree and locate the item that you want to restore.	
3	Right-click the item and select Mark\Unmark from the shortcut menu. System response The system flags that item for restoration.	
4	Click Restore Data . System response The marked data is restored to your system. Note If the system is unable to restore data, you are prompted to view the Audit Log for detailed information about why the failure occurred.	
5	Use the following table to determine how to view the restored data.	
	IF the restored data was an...	THEN you can view the data in the...
	interchange,	Restored Interchanges browser. Reference See How to View Restored Interchanges for more information.
	message,	Mailbox subsystem. Reference See the <i>Communications Guide</i> for more information.
external data file,	External Data Summary viewer. Reference See <i>Viewing External Data Files</i> on page 6 - 8 for more information.	

Restored Interchanges Browser

Introduction The Restored Interchanges browser enables you to view a list of all interchanges, groups, and documents that were restored from an archive file. This browser contains status information about the interchanges, such as whether a functional acknowledgement was received and the status of that acknowledgement.

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

Level	How to access	Information displayed (in middle pane) (all information may not appear)
Interchange	Open Restored Interchanges browser	<ul style="list-style-type: none"> • direction of the interchange • date and time the interchange was created • partner name • control number • interchange process status • network status • interchange acknowledgement status • message status <p>Note If any of these components are missing or not appropriate for a particular interchange, they are not displayed.</p>
Group	Double-click an interchange	<ul style="list-style-type: none"> • group control number • group type • group acknowledgement status <p>Note If any of these components are missing or not appropriate for a particular group, they are not displayed.</p> <p style="text-align: right;">(Continued on next page)</p>

Level	How to access	Information displayed (in middle pane) (all information may not appear)
Document	Double-click a group	<ul style="list-style-type: none"> • document compliant status • document control number • document type • document name • reference data • document compliant status • transaction acknowledgement status <p>Note If any of these components are missing or not appropriate for a particular document, they are not displayed.</p>
document data	Double-click a document Note A screen entry translation object for that document must be available on your system.	document data

Browser functions

You can perform the following functions on the Restored Interchanges browser:

- Filter the display of interchanges by date, partner, and direction (inbound and outbound) from the Interchanges Filter dialog box.
- Display the external data, raw-EDI data, and translator report data for the selected interchange or document in the appropriate browser panes.

Note

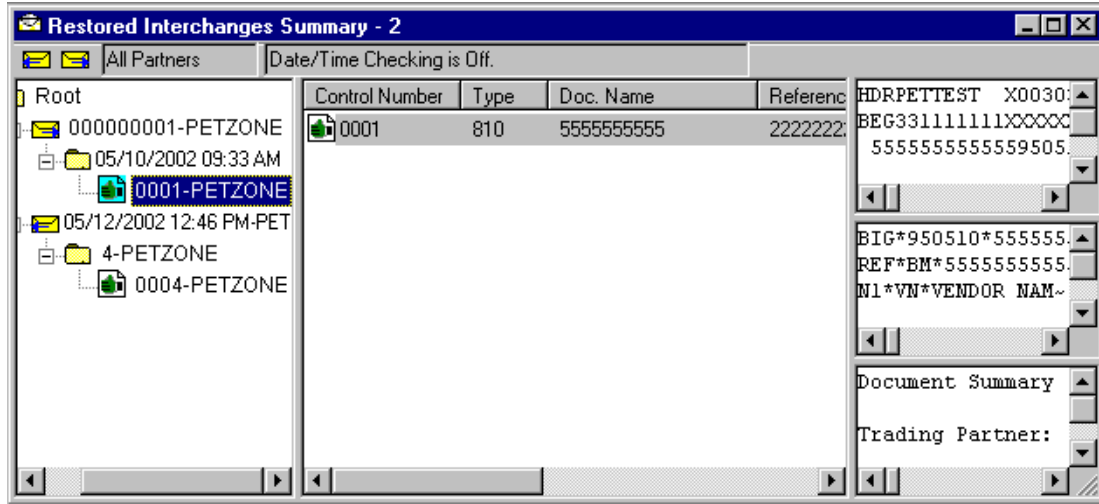
When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.

- Toggle the status of interchanges between Ready to Send and Hold.
- Print or delete a selected item.

Note

You might want to use the toggle function if you do not want to send an interchange right away.

Diagram The following illustrates the Restored Interchanges browser:



Parts and functions




The following lists the parts of the Restored Interchanges browser and their functions:

Part	Function
Status bar	Reflects the filer specifications from the <i>Interchange Filter Dialog Box</i> on page 7 - 8. Note The Electronic Commerce Manager status bar is updated when you select a single item from the middle pane.
left pane— Interchanges tree	Displays a list of all the restored interchanges, groups, and documents. Also displays the time created and partner name. Note To refresh the display of the Restored Interchanges browser, press F5 . Reference See the following for more information: <ul style="list-style-type: none"> • <i>Archive information available to view</i> on page 10 - 5 • <i>Document level status icons</i> on page 10 - 50 (Continued on next page)

Part	Function
middle pane— detailed list	<p>Displays detailed information about the document, group, or interchange selected. The information displayed depends on the level.</p> <p>Note</p> <ul style="list-style-type: none"> • To select multiple items, press and hold the CTRL key while selecting the items. • To refresh the display of the Interchanges browser, right-click the middle pane and select Refresh from the shortcut menu (or press F5).
upper right pane—External Data	<p>Displays the data file used in translation (if this option is selected from the View\Restored Interchanges menu).</p> <p>Notes</p> <ul style="list-style-type: none"> • This option only available if a single item is selected from the detailed list. • This option is not available if the external data file used in translation does not exist. • When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
middle right pane—Gentran Data	<p>Displays the data in EDI format (if this option is selected from the View\Restored Interchanges menu).</p> <p>Notes</p> <ul style="list-style-type: none"> • This option only available if a single item is selected from the detailed list. • When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
lower right pane—Translator Report	<p>Displays a report of the actions the translator took on this document and lists any EDI- or translation object-based compliance errors (if this option is selected from the View\Restored Interchanges menu).</p> <p>Note This option only available if a single item is selected from the detailed list.</p> <p>Reference See Error Messages in the <i>Administration Guide</i>, for a detailed explanation of translator reports.</p>

Document level status icons

The following lists the status icons that the system may use at the document level on the Restored Interchanges browser:

Status	Icon	Description
OK		(green) — Indicates that the documents are fully compliant with the EDI standard and are eligible for further processing.
NotOK		(red) — Indicates one of the following: <ul style="list-style-type: none"> ▶ The document failed to comply with the EDI standard. If this is the cause of the error, the errors will be indicated on a translator report associated with the document. Although the document is not fully compliant, it is eligible for further processing. ▶ The received document could not be associated with a specific trading partner. If this is the case, the partner listed for the document will be Unknown. To associate this document and the other documents received in the interchange with a partner, attach the documents from the Interchange browser. ▶ 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 will be 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. ▶ 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 will be listed on the translator report for the interchange containing the document
Duplicate		(yellow) — Indicates the document has the same name as another document on the system.

Viewing Restored Interchanges

Procedure To view restored interchanges, complete the following steps:

Step	Action	
1	From the appropriate area of The Desk, select Restored Interchanges . System response The system displays the Restored Interchanges Browser. Note To refresh the display of the Interchanges browser, right-click the middle pane and select Refresh from the shortcut menu (or press F5).	
2	Do you want to filter the display of interchanges by status? <ul style="list-style-type: none"> ▶ If <i>yes</i>, see <i>Filtering the Display of Restored Interchanges</i> on page 10 - 53. ▶ If <i>no</i>, continue with step 3. Note The Filter function enables you to filter the display of restored interchanges by date, partner, and direction (inbound and outbound).	
3	Select an interchange.	
4	Use the following table to determine your next step.	
	IF you want to...	THEN select...
	view the content of a single selected interchange in raw EDI data format,	<ul style="list-style-type: none"> ▶ Restored Interchanges from the View menu, and then ▶ select Gentran Data from the submenu. Note When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu. (Continued on next page)

Step	Action	
4 (contd.)	view the corresponding external data file,	<ul style="list-style-type: none"> • Restored Interchanges from the View menu, and then • select External Data from the submenu. <p>Note When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.</p>
	view the translator report for a single selected interchange,	<ul style="list-style-type: none"> • Restored Interchanges from the View menu, and then • select Translator Report from the submenu.
	print a selected interchange or a summary of interchanges,	Print from the File menu.
	delete a selected interchange and all associated documents,	<p>Delete from the Document menu.</p> <p>Notes</p> <ul style="list-style-type: none"> • 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. • 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.

Filtering the Display of Restored Interchanges

Procedure To filter restored interchanges by partner and/or date, complete the following steps:

Step	Action
1	<p>From the appropriate area of The Desk, select Restored Interchanges.</p> <p>System response The system displays the Restored Interchanges Browser.</p>
2	<p>From the Commands menu, select Filter.</p> <p>System response The system displays the Interchange Filter Dialog Box.</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"> ▶ If <i>no</i>, select the No Date/Time Checking check box and proceed with step 6. ▶ If <i>yes</i>, clear the No Date/Time Checking check box and proceed with step 4.
4	<p>Use the Date From slide bar to select the beginning of the 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"> ▶ If <i>no</i>, deselect the Always Current check box and move the Date To slide bar to the end of the date range. ▶ If <i>yes</i>, select the Always Current check box.
6	<p>Do you want to filter the display of restored interchanges by partner?</p> <ul style="list-style-type: none"> ▶ If <i>no</i>, continue with step 7. ▶ If <i>yes</i>, select the partners that you want displayed from the Partner list (which contains a list of all the partner profiles on your system). <p>Note The default display is all partners, but you can click partner profiles to unselect them and change the display. Alternately, you can click Unselect All Partners to clear all the partner profiles. You can then click one or more profiles to select them. At least one partner must be selected.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
7	<p data-bbox="613 310 1247 342">Which direction do you want to filter the interchange?</p> <p data-bbox="613 369 721 401">Default</p> <p data-bbox="613 405 1357 468">The default display is both inbound and outbound interchanges. Click the Inbound or Outbound check box to clear the direction.</p> <p data-bbox="613 495 678 527">Note</p> <p data-bbox="613 531 1300 562">At least one of the Direction check boxes must be selected.</p>
8	<p data-bbox="613 588 737 619">Click OK.</p> <p data-bbox="613 646 846 678">System response</p> <p data-bbox="613 682 1357 745">The system filters the restored interchange display based on the criteria you selected.</p>

Viewing Restored Documents

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 a restored interchange, complete the following steps:

Step	Action
1	<p>From the appropriate area of The Desk, select Restored Interchanges.</p> <p>System response The system displays the Restored Interchanges Browser.</p> <p>Note To refresh the display of the Interchanges browser, right-click the middle pane and select Refresh from the shortcut menu (or press F5).</p>
2	<p>Select a document and proceed with the next step or double-click a document to view it.</p> <p>Note You must have a screen entry translation object for this document available on your system.</p> <p>(Continued on next page)</p>

Step	Action	
3	With a document selected, use this table to determine your next step.	
	IF you want to...	THEN select...
	view a translator report of the actions the translator took on this document,	<ul style="list-style-type: none"> ▶ Interchanges from the View menu, and then ▶ select Translator Report.
	view the content of a single selected interchange in raw EDI data format,	<ul style="list-style-type: none"> ▶ Interchanges from the View menu, and then ▶ select Gentran Data from the submenu. <p>Note When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.</p>
	view the related external data of a single selected interchange,	<ul style="list-style-type: none"> ▶ Interchanges from the View menu, and then ▶ select Related External Data from the submenu. <p>Note When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.</p>
	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"> ▶ Copy from the Document menu. ▶ select the appropriate browser (?In Documents Browser or In Documents Browser for compliant Inbound documents; Workspace Browser for outbound documents) from the submenu.

Reprocessing Restored Documents

Introduction To reprocess data from the Restored Interchanges browser, you must use the Copy command to move the selected outbound documents to the Workspace and the compliant inbound documents to the In Documents or ?In Documents browsers.

Procedure To reprocess data, complete the following steps:

Step	Action
1	<p>From the appropriate area of The Desk, select Restored Interchanges.</p> <p>System response The system displays the Restored Interchanges Browser.</p> <p>Note To refresh the display of the Interchanges browser, right-click the middle pane and select Refresh from the shortcut menu (or press F5).</p>
2	<p>Select the documents that you wish to copy to the Workspace Browser, In Documents Browser, or ?In Documents Browser so you can reprocess and/or resend them.</p>
3	<p>From the Document menu, select Copy.</p>
4	<p>Select the appropriate browser from the cascading menu to copy the restored interchanges to that browser.</p>

Resending Restored Interchanges

Introduction To resend outbound interchanges from the Restored Interchanges browser, you must use the Resend command.

Note

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 process that occurs when you resend a selected interchange.

Stage	Description
1	The restored interchange is listed in the Restored Interchanges Browser. Reference See <i>Filtering the Display of Restored Interchanges</i> on page 10 - 53 for instructions.
2	When the resend command is executed, the system first determines if it is a TRADACOMS interchange. If the interchange is TRADACOMS, the system increments the current version number in the FIL segment by one. After this update, the interchange is resent in the same manner as all other interchanges.
3	Communication is established with the remote end. The status of the message is updated based on the success or failure of the communications session. <ul style="list-style-type: none"> ▶ If the communication fails because there is no mailbox set up or because the Mailbox service is not started, the interchange and documents are left in a Ready to send status. ▶ If communication fails because there is no modem, the interchange and documents are left in a Queued status. <p>Note 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 Browser and the interchange status is set to Sent.

Procedure To resend restored outbound interchanges, complete the following steps:

Step	Action
1	From the appropriate area of The Desk, select Restored Interchanges . System response The system displays the Restored Interchanges Browser.
2	Select the outbound interchange that needs to be resent.
3	From the Document menu, select Resend . System response The system displays the Gentrans:Server for Windows dialog box.
4	Click Yes to start the transmission session.

Using Process Control

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Introduction

In this chapter This chapter explains how to use the Gentran:Server process control.

Process control feature Process control feature enables you to automate your message processing. Essentially, you need to tell the system what you want done and when, and process control takes care of it for you automatically.

With process control, you can build customized events to initiate the processing functions of Gentran:Server. These processing functions include the following.

- importing data from your application files
- exporting data to your application files
- sending
- receiving

In addition, file and process management functions can be executed that provide additional flexibility in integrating your application with Gentran:Server.

Event creation process Process control is regulated by *events*, which are a combination of what you want done (a session) and when to process a session (calendar, days, a date, or based on whether or not a file exists). The following describes the event creation process:

Stage	Description
1	Create a process control session. Reference See <i>Creating Sessions</i> on page 11 - 10 for more information.
2	Create a process control calendar (if necessary). Reference See <i>Creating and Editing Calendars</i> on page 11 - 42 for more information.
3	Create the process control event. Reference See <i>Creating New Events</i> on page 11 - 24 for more information.
4	Activate the event. Reference See <i>Activating and Suspending Events</i> on page 11 - 37 for more information.

Sessions

Overview

Introduction

A session definition is an integral part of a process control event. The session setup process enables you to configure and edit process control session scripts. Sessions are defined independently from the event, so the same session definition can be scheduled multiple times.

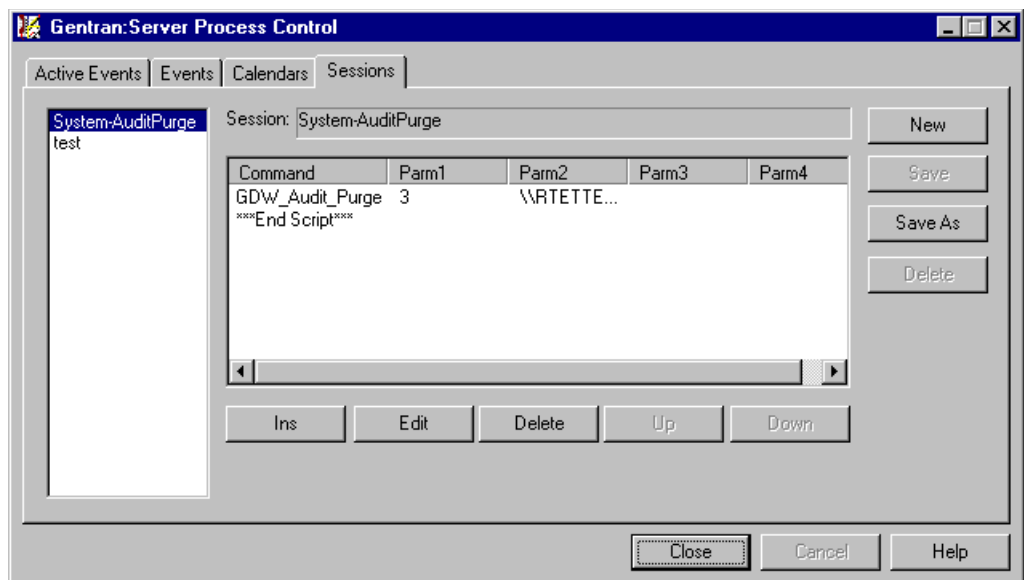
What is a session script?

A session script consists of a list of commands (Gentran:Server functions) that the system executes in the sequence listed. You can set parameters for each allowable command. You can also place conditions on the command you choose. These conditions determine whether or not the command is executed within the session.

You can specify two types of conditions: The system can query for the presence or absence of a specific file; the system can determine whether or not documents exist in a specific location. If the evaluated condition is true, the command is executed. If the condition is false, the command is skipped and processing continues with the next defined command.

Process Control dialog box (Sessions tab)

The following illustrates the Sessions tab of the Process Control dialog box:



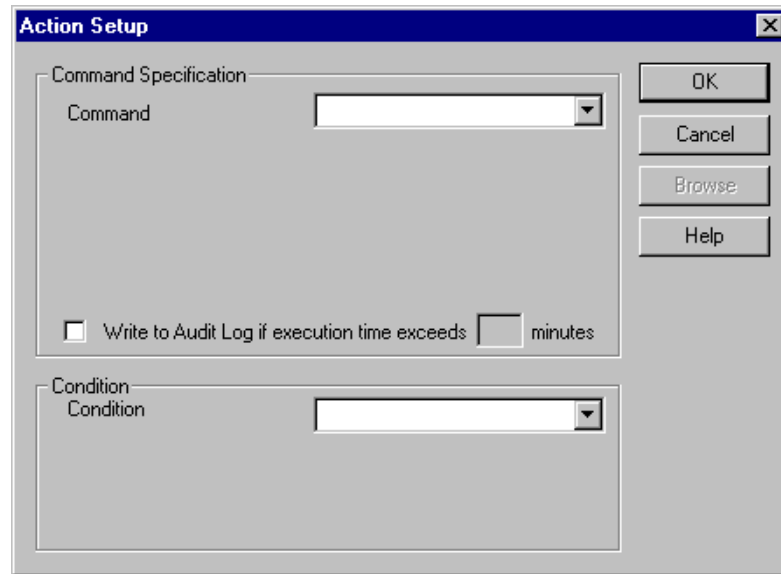
Sessions tab parts and functions

The following lists the parts of the Process Control dialog box Session tab and their functions:

Part	Function
(list)	Displays all currently defined session scripts.
Session	Displays the script of the currently-selected session.
Ins	Accesses the Action Setup dialog box so you can insert a script command above the current line.
Edit	Accesses the Action Setup dialog box so you can modify the selected script command.
Delete	Deletes the selected script command.
Up	Moves the selected command up one line in the script.
Down	Moves the selected command down one line in the script.
New	Accesses the New Session dialog box so you can create a new session.
Save	Saves the current session script.
Save As	Saves the current session script under another name.
Delete	Deletes the selected session.

Action Setup dialog box

The following illustrates the Action Setup dialog box:



Action Setup dialog box parts and functions

The following lists the parts of the Action Setup dialog box and their functions:

Part	Function
Command Specification	Select which command you want to add to the script. Note Selecting a command allows you to access the parameters for that command, which the system displays in the Command Setup section.
Write to Audit Log if execution time exceeds	Specify that the system write an audit message if the command execution time exceeds the specified number of minutes (next field). Note If a command exceeds the allotted time, the system writes a warning message to the Audit Log and the command continues to run until it completes.
minutes	Specify the number of minutes after which the system writes a message to the Audit Log if the command has not finished processing.
Condition	Select conditions for the command. These conditions determine whether or not the command is executed within the session.

Commands The following lists the script commands and their actions:

Note

See the Gentran:Server online Help for detailed information about these commands.

Command	Action
Exec_Program	Indicates a program for the system to run. Note When this command is executed, the system writes an informational message to the Audit Log indicating which program (command line in working directory) was run.
Exec_Program_Ex	Indicates a program for the system to run and for which the system will pass the Event ID and controller name. Note This function is used by the Gentran:Server for RosettaNet install program.
File_Copy	Copies a file. Note When this command is executed, the system writes an informational message to the Audit Log indicating that the file copy was successful.
File_Rename	Changes the name of a file.
File_Delete	Removes a file from the system. Note When this command is executed, the system writes an informational message to the Audit Log indicating that the deletion of the file was successful.
GDW_Archive	Performs the archive command according to the specifications of a selected archive definition file.
GDW_Audit_Rpt	Copies the audit records to a specified file.

(Continued on next page)

Command	Action
GDW_Audit_Purge	<p>Deletes all audit records in the system.</p> <p>Note The purged Audit Log entries are removed from the database and appended to a text file. To ensure that the text file does not grow unchecked, you may want to use a File_Delete command prior to this command.</p>
GDW_Audit_Write	<p>Writes a processing user audit message to the Audit Log, based on the specified parameters.</p>
GDW_Document_Purge	<p>Removes document records from the Gentran:Server database according to the specified age/date, location, partner name, transaction, and/or status.</p>
GDW_Document_Rpt	<p>Creates a specified file that contains document data (as well as group and interchange data, if applicable) for documents in the Gentran:Server database according to the specified status, location, and/or age/date.</p>
GDW_Export	<p>Performs the Export function and can perform the send mailbox function to enable the output of an inbound translation to be delivered back to the Mailbox Server Manager.</p> <p>Note You must have an export translation object registered with the system.</p>
GDW_ExtData_Delete	<p>Deletes external data references based on the action taken on the external data and/or age.</p>
GDW_Import	<p>Performs the Import function on a specified file.</p> <p>Note You must have an import translation object registered with the system.</p> <p style="text-align: right;">(Continued on next page)</p>

Command	Action
GDW_Notify_Purge	<p>Deletes all notification records in the system or deletes them by age, if specified.</p> <p>Note The purged notification log entries are removed from the database and appended to a text file. To ensure that the text file does not grow unchecked, you may want to use a File_Delete command prior to this command.</p>
GDW_Partner_Delete	Executes the partner delete command.
GDW_Partner_Import	Executes the partner import command.
GDW_Partner_Export	Executes the partner export command.
GDW_Print	<p>Performs the Print function.</p> <p>Note You must have a print translation object registered with the system.</p>
GDW_Process_File	<p>Invokes the post-communications process with any EDI file as if the file was received via a communication session.</p> <p>Note You must have an export translation object registered with the system.</p>
GDW_Receive	Performs the Receive Only function.
GDW_Send	Performs an automated send for all partners and mailboxes that have documents posted to be sent (unless you specify a particular partner, mailbox, and transaction combination).
GDW_Send_Receive	Performs the Send/Receive function. This function does not wait for previously executed Send/Receive sessions to finish; it executes the Send/Receive when you specify.
Terminate_Script	Terminates the script.

Conditions

The following lists the script conditions and their actions:

IF the condition is...	THEN it indicates that...
If File Below Exists	the system must look for the file you specify and then execute the command based on whether the file is found or not found.
If Docs Are In the Location Below	the system must look for the documents in the location you specify and then execute the command based on whether or not the documents are found in that location.

Creating Sessions

Procedure To create a process control session, complete the following steps

Step	Action
Creating a session	
1	Click Process Control on The Desk. System response The system displays the Gentran:Server Process Control dialog box.
2	Click the Sessions tab to access the sessions options. System response The system displays the Process Control dialog box (Sessions tab).
3	Click New . System response The system displays the New Session dialog box.
4	In the Session Name box, type in the new session name, using alphanumeric characters. Note The dash (-) character is also allowed.
5	Click OK to add the new session.
Building the session script	
1	With the new session currently selected, click Ins to insert a command above the current line. System response The system displays the Action Setup dialog box. This dialog box allows you to create script commands.
2	From the Command list, select a command. Note The Commands list allows you to select which command you want to add to the script, which enables you to access the parameters for that command (displayed below this box in the Action Setup section). After you choose a command, additional boxes may be displayed in the Command Specification section of the dialog box. (Continued on next page)

Step	Action
3	<p>Complete the boxes in the Command Specification section of the dialog box with the appropriate values.</p> <p>Reference See <i>Commands</i> on page 11 - 6 for more information.</p>
4	<p>Do you want to specify a limit (in minutes) on how long this command should process before the system writes a message to the Audit Log?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the check box and type the number of minutes in the box. ▶ If <i>no</i>, continue with the next step.
5	<p>Do you want to apply a condition to the command?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select a condition from the Condition list. ▶ If <i>no</i>, continue with Step 8. <p>Note Each script command can have an associated condition. These conditions are evaluated just prior to execution of the command and can be used to control the processing flow of your session.</p> <p>After you choose a condition, the system displays two additional boxes in the Condition section of the dialog box.</p>
6	<p>Complete the boxes in the Condition section of the dialog box with the appropriate values.</p> <p>Note If you selected the If file Below Exists condition, you can use a wildcard (*) to specify the name of the file for which you want the system to check.</p>
7	<p>Did you specify conditional execution?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, you must also select True or False from the Result list. ▶ If <i>no</i>, continue with the next step. <p>Notes</p> <ul style="list-style-type: none"> ▶ If you select True, you are indicating that the command should only be executed if there are documents in the specific location or if the file is present. ▶ If you select False, you are indicating that the command should be executed only if there are no documents in the specific location or if the specified file does <i>not</i> exist. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
8	Click OK . System response The command is saved and you return to the Gentran:Server Process Control dialog box.
9	Repeat Steps 1 through 8 until you finish adding commands to the session script. Notes <ul style="list-style-type: none"> ▶ If you need to resequence the commands in the script, use Up and Down. ▶ If you need to edit a command in the script, select that command and click Edit. ▶ If you need to delete a command from a script, select that command and click Delete.
Saving the session	
1	Click Save to save the new session script.
2	Click OK to exit the Gentran:Server Process Control dialog box.

Editing Sessions

Introduction If an event calls a session that is currently processing or is activated, you are unable to edit and save the session until the event has either finished processing or you suspend the event. However, you can edit the session and use the Save As function to save it under another name.

Reference

See *Procedure: suspending an event* on page 11 - 38 for more information.

Procedure To edit an existing session, complete the following steps:

Step	Action
1	Click Process Control on The Desk. System response The system displays the Gentran:Server Process Control dialog box.
2	Click the Sessions tab to access the sessions options. System response The system displays the Process Control dialog box (Sessions tab).
3	Select a session to display the session script.
4	With the session selected, click Ins to insert a command above the current line. System response The system displays the Action Setup dialog box.
5	From the Command list, select a command. Note The Commands list allows you to select which command you want to add to the script, which enables you to access the parameters for that command (displayed below this box in the Action Setup section). Reference See <i>Commands</i> on page 11 - 6 for more information. (Continued on next page)

Step	Action
6	<p>Do you want to specify a limit (in minutes) on how long this command should process before the system writes a message to the Audit Log?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the check box and type the number of minutes in the box. ▶ If <i>no</i>, continue with the next step.
7	<p>After you choose a command, additional boxes may be displayed in the Command Specification section of the dialog box. Complete these boxes with the appropriate values.</p>
8	<p>If you want to apply a condition to the command, select a condition from the Condition list.</p>
9	<p>After you choose a condition, the system displays two additional boxes in the Condition section of the dialog box. Complete these boxes with the appropriate values.</p> <p>Note If you selected the If file Below Exists condition, you can use a wildcard (*) to specify the name of the file for which you want the system to check.</p>
10	<p>When you specify conditional execution, you must also select True or False from the Result list.</p> <p>Notes</p> <ul style="list-style-type: none"> ▶ If you select True, you are indicating that the command should only be executed if there are documents in the specific location or if the file is present. ▶ If you select False, you are indicating that the command should be executed only if there are no documents in the specific location or if the specified file does <i>not</i> exist.
11	<p>Click OK.</p> <p>System response The command is saved and you return to the Gentran:Server Process Control dialog box.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
12	<p>Repeat Steps 4 through 11 until you finish adding commands to the session script. Use Up and Down if you need to resequence the commands in the script.</p> <p>Note</p> <ul style="list-style-type: none">▶ If you need to edit a command in a script, select that command and click Edit.▶ If you need to delete a command from a script, select that command and click Delete.
13	<p>Click Save to save the new session script.</p> <p>Note</p> <p>If you want to save the session under another name, click SaveAs, type the new session name, and click OK.</p>
14	<p>Click OK to exit the Gentran:Server Process Control dialog box.</p>

Deleting Sessions

Introduction If an event calls a session that is currently processing or is activated, you are unable to delete the session until the event has either finished processing or you suspend the event.

Reference

See *Procedure: suspending an event* on page 11 - 38 for more information.

Procedure To delete a session, complete the following steps:

Step	Action
1	Click Process Control on The Desk. System response The system displays the Gentran:Server Process Control dialog box.
2	Click the Sessions tab to access the sessions options. System response The system displays the Process Control dialog box (Sessions tab).
3	Select a session and click Delete . System response The Gentran:Server Process Control dialog box asks you to confirm the delete operation.
4	Click Yes to delete the current selection.
5	Click OK to exit the Gentran:Server Process Control dialog box.

Events

Overview

Introduction

Events are a combination of the following:

- A time or day to execute or a file name for which the system checks
- The controller on which the event is processed
- A session definition

The Process Control runs events based on whether they are timed or polled. You define the events in a session definition.

The Process Control enables you to process an event at a specified time, every day. Additional options enable you to restrict processing to certain days of the week or a specific date. In addition, you can define calendars to exclude specific holidays or days of the week from the processing schedule.

You manage events by using the following dialog boxes:

- Process Control dialog box (Events tab)
- Event Setup dialog box
- Process Control dialog box (Active Events tab)

Before you begin

You must have already defined the session definition to be executed prior to creating an event.

Reference

See *Creating Sessions* on page 11 - 10 for more information.

Timed events

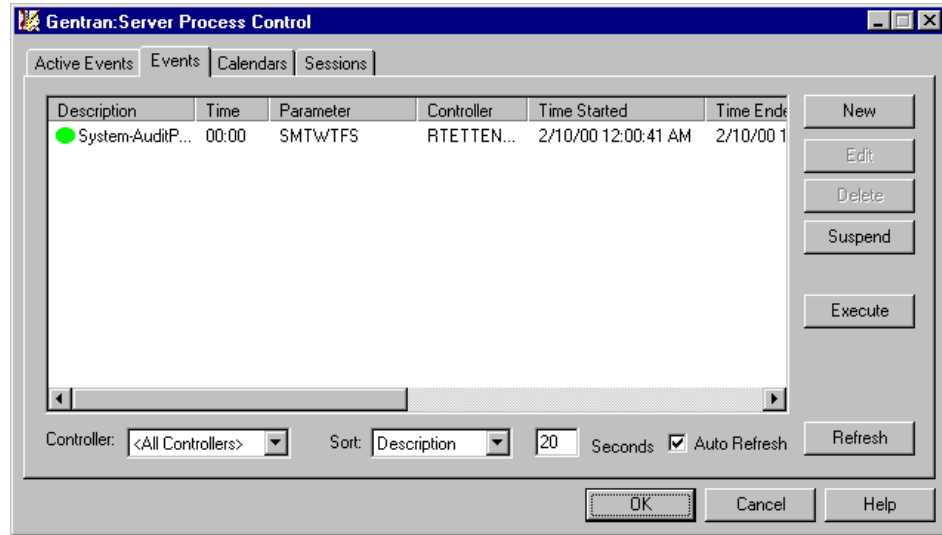
When a timed event is activated, the Gentran Scheduler initiates that event at the correct time on the appropriate day or date.

Polled events

When a polled event is activated, the Gentran Poller polls the controller for the presence or absence of a defined file (depending on what is indicated in the event definition), and initiates the event when the specified file either exists or does not exist (based on the event definition).

Process Control dialog box (Events tab)

The following illustrates the Events tab of the Process Control dialog box:



Events tab parts and functions

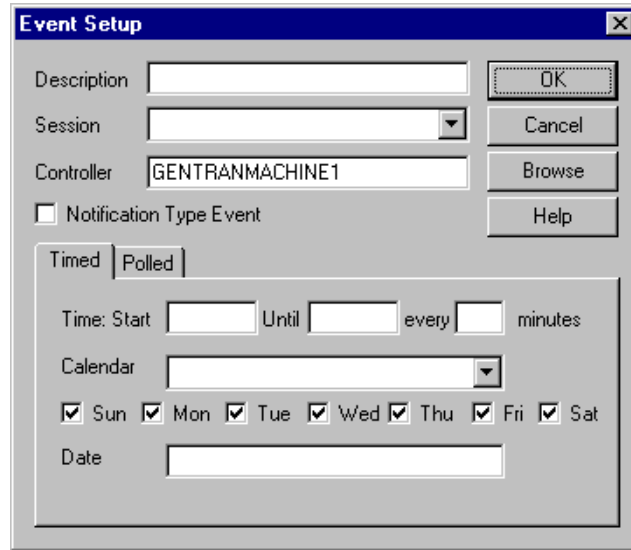
The following lists the parts of the Process Control dialog box Events tab and their functions:

Part	Function	
(list)	Displays all scheduled events.	
Controller	Select the controller whose events you want filtered.	
Sort	Select how you want the list of events sorted.	
	IF you sort by...	THEN the events are listed...
	description (the default)	in alphabetic order of the event descriptions.
	controller	in alphabetic order by controller. Note For each controller, the events are listed in alphabetic order by event description.
status	by currently processing events first (red indicator), activated events second (green indicator), and suspended events third (yellow indicator). Note Within each status, the events are listed in alphabetic order by event description.	

Part	Function
Seconds	Specify the interval (in seconds) at which you want the system to refresh the dialog box (default is 20 seconds).
Auto Refresh	Indicate whether you want the Process Control dialog box to automatically refresh (so you do not have to click Refresh).
New	Accesses the Event Setup dialog box so you can create a new event entry.
Edit	Accesses the Event Setup dialog box so you can modify the selected event entry.
Delete	Deletes the selected event entry.
Activate/Suspend	<ul style="list-style-type: none"> ▶ If a selected event is suspended (yellow indicator), the Activate/Suspend toggle button reads Activate. ▶ If a selected event is activated (green indicator), the Activate/Suspend toggle button reads Suspend.
Execute	<p>Executes the selected event immediately, which allows you to manually invoke an unattended session. This also enables you to test a new event or an event that failed.</p> <p>Notes</p> <ul style="list-style-type: none"> ▶ Executing an event immediately using this button does not replace the next scheduled run of the event. ▶ When you click this button, an informational message box is displayed. <ul style="list-style-type: none"> — If the selected event is scheduled to execute within the next 30 minutes, you are notified when the event is scheduled to run and prompted to specify whether you want to run it now (click OK) or cancel the request (click Cancel). — If the selected event is <i>not</i> scheduled to execute within the next 30 minutes, you are prompted to either confirm the request to execute it immediately (click OK) or cancel the request (click Cancel).
Refresh	Refreshes the display of the Events tab.

Event Setup dialog box

The following illustrates the Event Setup dialog box:



Event Setup dialog box parts and functions

The following lists the parts of the Event Setup dialog box and their functions:

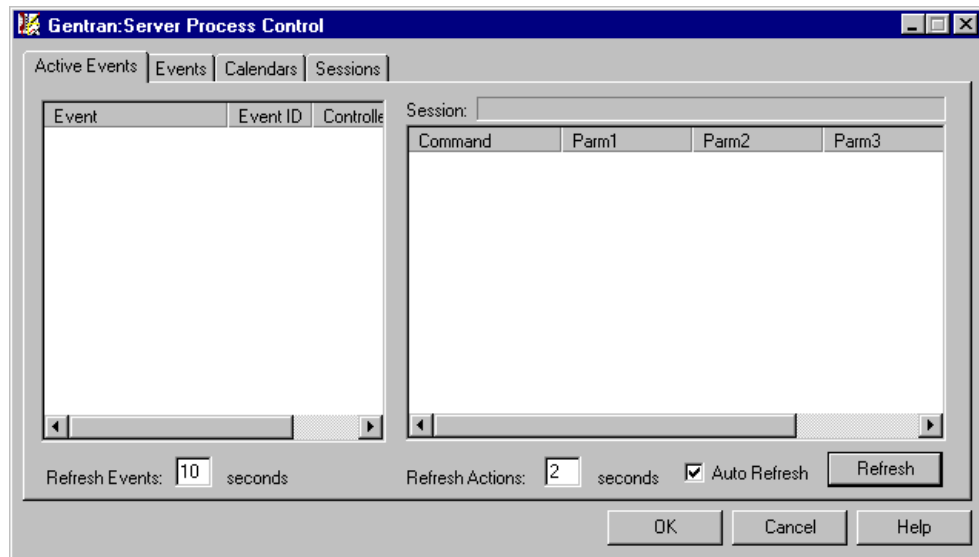
Part	Function
Description	Enter a description of the event.
Session	Select one of the sessions you defined on the Sessions tab.
Controller	Specify the name of the controller on which the event is run.
Notification Type Event	Designate this event as a “notify type,” which means that the system executes it based on parameters set in the Notification Log. Note Selecting this check box deactivates the Timed and Polled tabs.
Timed tab	
Start	Indicate the beginning run time of a session. Note You must enter the time in 24-hour HH:MM format. If you do not enter the time in this format, the system attempts to determine the correct 24 hour time from what you entered. (Continued on next page)

Part	Function
Until	<p>Specify a stop time for the event.</p> <p>Note You can either use 24-hour HH:MM format or 12-hour HH:MM or H:MM format with the designator "a" (am) or "p" (pm).</p> <p>Note An event will always execute on its end time regardless of the interval that is set. To have an event execute once, do not enter an end time or interval.</p>
Minutes	<p>Specify an interval of time after which the event is to be executed.</p> <p>Example If you specify "15" minutes, the event is executed every 15 minutes.</p>
Calendar	<p>Select one of the calendars you defined on the Calendars tab that you want the system to check against when scheduling this session.</p> <p>Notes</p> <ul style="list-style-type: none"> • A calendar allows you to specify days in each month that you do not want the selected session to be run. • If you use the Date box, you cannot use the Calendar box.
Sun/Mon/Tue/Wed/ Thu/Fri/Sat	<p>Indicate which days of the week the event is to be executed.</p>
Date	<p>Specify a date on which the event is to be executed.</p> <p>Notes</p> <ul style="list-style-type: none"> • You can enter this date in any format, but the sequence of the date you enter must correspond to the international Windows date formats (for example, in the United State, dates must be entered in month/day/year format). • If you select a calendar from the Calendar box or days of the week, you cannot use the Date box. <p style="text-align: right;">(Continued on next page)</p>

Part	Function
Polled tab	
File name	Specify the name of the file for which the system checks. Note You can use a wildcard (*) to specify the name of the file.
Browse	Accesses the Choose Network Server dialog box so you can browse for the file for which you want the system to check.
Result	Indicate whether the event should be executed if the result is True or False . Note <ul style="list-style-type: none"> • If you select True, you are indicating that the event should be executed only when the specified file is present. • If you select False, you are indicating that the event should be executed only when the specified file does <i>not</i> exist.

Process Control dialog box (Active Events tab)

The following illustrates the Active Events tab of the Process Control dialog box:



Active Events tab parts and functions

The following lists the parts of the Process Control dialog box Active Events tab and their functions:

Part	Function
(Event list)	Displays the events that are currently processing.
(Session list)	Lists each command and the associated parameters for the session script for the event that is currently processing. Note A green arrow indicates which command the system is currently processing.
Refresh Events seconds	Specify the default interval (10 seconds) for refreshing the Active Events list. Valid values are 2 – 300 seconds. Notes <ul style="list-style-type: none"> ▶ This value is saved when you change focus on the dialog box (click another box). ▶ The Auto Refresh check box must be selected (checked) for the Seconds boxes to be available.
Refresh Actions seconds	Specify the default interval (2 seconds) for refreshing the Sessions list. Valid values are 2 seconds – 300 seconds. Notes <ul style="list-style-type: none"> ▶ This value is saved when you change focus on the dialog box (click another box). ▶ The Auto Refresh check box must be selected (checked) for the Seconds boxes to be available.
Auto Refresh	Indicate whether you want automatic refresh enabled. The default is Enabled, which means that you do not have to click Refresh .
Refresh	Manually refreshes the Active Events display. Note If the Active Events tab has not been refreshed after an event has expired (is no longer active), the system continues to display the event on the Active Events tab (even though it is inactive), until the Active Events tab is refreshed.

Creating New Events

Introduction You can specify that the event runs as *timed* or as *polled*. If the event is running as “timed,” you must specify a time, a pre-defined calendar and/or days of the week to run, or a date to run one time only. When it is time for the event to be run, the Gentran Scheduler service initiates the processing of the event.

If the event is running as “polled,” you can specify a file name and whether the event should run if the file exists or not. The Gentran Poller service polls the process controller.

- If you specified that the file must exist, the Gentran Poller initiates the processing of the event when the file appears.
- If you specified that the file must not exist, the Gentran Poller initiates the processing of the event when the file no longer exists on the controller.

Procedure To create a new event, complete the following steps:

Step	Action
Creating a new event	
1	Click Process Control on The Desk. System response The system displays the Gentran:Server Process Control dialog box.
2	Click the Events tab to display the event options. System response The system displays the Process Control dialog box (Events tab).
3	Click New . System response The system displays the Event Setup dialog box so you can create a new event entry.
4	In the Description box, type a description of the event.
5	From the Session list, select the session that you want to be executed.
6	In the Controller box, type or select the machine name of the controller on which you want this event to be run. (Continued on next page)

Step	Action
7	<p>Do you want to designate this event as a notification type?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the check box and continue with Step 2 in <i>Saving the event</i> on page 11 - 27. ▶ If <i>no</i>, continue with the next step.
Complete this section if the event is timed	
1	<p>In the Time Start box (on the Timed tab), you must fill in a time.</p> <p>Note You must use 24-hour HH:MM format.</p>
2	<p>If you want to specify a stop time for the event, type that time in the Until box (on the Timed tab).</p> <p>Note You can either use 24-hour HH:MM format or 12-hour HH:MM or H:MM format with the designator “a” (am) or “p” (pm).</p>
3	<p>Do you want to specify an interval of time after which the event is run?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, in the Minutes box (on the Timed tab), type the number of minutes after which you want the event to be executed and continue with Step 4. <p>Example If you specify 15 minutes, the event is executed every 15 minutes from the start time.</p> <ul style="list-style-type: none"> ▶ If <i>no</i>, continue with Step 4.
4	<p>Do you want to use a predefined calendar?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select that calendar from the Calendar list and continue with Step 5. ▶ If <i>no</i>, continue with Step 5. <p>Note A calendar enables you to specify the days in each month that you do not want the selected session to be run. If you select a calendar, you can also select specific days of the week on which you want this session to run on. However, if you select a calendar, you cannot specify a day in the Date box.</p> <p>Reference If you need to define a calendar, see <i>Creating and Editing Calendars</i> on page 11 - 42.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
5	<p>Do you want to select a day or days of the week on which you want this session to be scheduled?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, click the check box next to the days on which the event should be run and continue with Step 6. ▶ If <i>no</i>, continue with Step 6. <p>Note By default, every day of the week is selected. If any days are selected in this section, then the schedule is executed <i>only</i> on those days. If you select days from this section, you cannot use the Date box.</p>
6	<p>Do you want to specify a day in which you want this session to run one time only?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, type that date in the Date box and continue with <i>Saving the event</i> on page 11 - 27. ▶ If <i>no</i>, continue with <i>Saving the event</i> on page 11 - 27. <p>Note This box enables you to specify a date on which this session should run one time only. The system then removes the session from the database. If you type a date in this box, you cannot select from the days of the week check boxes.</p> <p>Format You can enter this date in any format, but the sequence of the date you enter must correspond to the international Windows date formats (for example, in the United States, dates must be entered in MM/DD/YY format, and in the United Kingdom, dates must be entered in DD/MM/YY).</p>
Complete this section if the event is polled	
1	<p>Click the Polled tab on the Event Setup dialog box.</p> <p>System response The system displays the polled options.</p>
2	<p>In the File name box, complete only <i>one</i> of the following:</p> <ul style="list-style-type: none"> ▶ Type the path and name of the file for which you want the system to check. ▶ Click Browse to select the file from the appropriate drive and directory. <p>Note You can use a wildcard (*) to specify the name of the file.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
3	<p>From the Result list, select True or False.</p> <p>Note</p> <ul style="list-style-type: none">▶ If you select True, you are indicating that the event should only be executed when the specified file is present.▶ If you select False, you are indicating that the event should be executed only when the specified file does <i>not</i> exist.
Saving the event	
1	<p>Click OK.</p> <p>System response The event is saved and you exit the Event Setup dialog box.</p>
2	<p>Click OK.</p> <p>System response The system exits the Gentran:Server Process Control dialog box.</p>

Editing Events

Introduction You are not able to edit an event unless the event is suspended.

Reference

See *Procedure: suspending an event* on page 11 - 38 for more information.

Procedure To edit an existing event, complete the following steps:

Step	Action
Editing an event	
1	Click Process Control on The Desk. System response The system displays the Gentran:Server Process Control dialog box.
2	Click the Events tab to display the event options. System response The system displays the Process Control dialog box (Events tab).
3	Select the event that you want to modify and click Edit . System response The system displays the Event Setup dialog box.
4	If you want to modify the description of the event, type the new description in the Description box.
5	If you want to select another session to be executed, do so from the Session list.
6	If you want to change the controller on which you want this event to be run, type the machine name in the Controller box.
7	Do you want to designate this event as a notification type? <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the check box and continue with Step 2 in <i>Saving the event</i> on page 11 - 31. ▶ If <i>no</i>, continue with the next step. <p style="text-align: right;">(Continued on next page)</p>

Step	Action
Complete this section if the event is timed	
1	<p>In the Time Start box (on the Timed tab), type a time.</p> <p>Note You can either use 24-hour HH:MM format or 12-hour HH:MM format with the designator “a” (am) or “p” (pm).</p>
2	<p>If you want to specify a stop time for the event, type that time in the Until box (on the Timed tab).</p> <p>Note You can either use 24-hour HH:MM format or 12-hour HH:MM or H:MM format with the designator “a” (am) or “p” (pm).</p>
3	<p>Do you want to specify an interval of time after which the event is run?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, in the Minutes box (on the Timed tab), type the number of minutes after which you want the event to be executed and continue with Step 4. <p>Example If you specify 15 minutes, the event is executed every 15 minutes.</p> <ul style="list-style-type: none"> ▶ If <i>no</i>, continue with Step 4.
4	<p>Do you want to use a predefined calendar?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select that calendar from the Calendar list and continue with Step 5. ▶ If <i>no</i>, continue with Step 5. <p>Note A calendar enables you to specify days in each month that you do not want the selected session to be run. If you select a calendar, you can also select specific days of the week on which you want this session to run on. However, if you select a calendar, you cannot specify a day in the Date box.</p> <p>Reference If you need to define a calendar, please see <i>Creating and Editing Calendars</i> on page 11 - 42.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
5	<p>Do you want to select a day or days of the week on which you want this session to be scheduled?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, click the check box next to those days and continue with Step 6. ▶ If <i>no</i>, continue with Step 6. <p>Note By default, every day of the week is selected. If any days are selected in this section, then the schedule is executed <i>only</i> on those days. If you select days from this section, you cannot use the Date box.</p>
6	<p>Do you want to specify a day in which you want this session to run one time only?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, type that date in the Date box and continue with saving the event. ▶ If <i>no</i>, continue with saving the event. <p>Note This box enables you to specify a date on which this session should run one time only and then be removed from the database by the system. If you type a date in this box, you cannot select from the days of the week check boxes.</p> <p>Format You can enter this date in any format, but the sequence of the date you enter must correspond to the international Windows date formats (for example, in the United States, dates must be entered in MM/DD/YY format, and in the United Kingdom, dates must be entered in DD/MM/YY).</p>
Complete this section if the event is polled	
1	<p>Click the Polled tab on the Event Setup dialog box.</p> <p>System response The system displays the polled options.</p>
2	<p>In the File name box, complete only <i>one</i> of the following:</p> <ul style="list-style-type: none"> ▶ Type the path and name of the file for which you want the system to check. ▶ Click Browse to select the file from the appropriate drive and directory. <p>Note You can use a wildcard (*) to specify the name.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
3	<p>From the Result list, select True or False.</p> <p>Note</p> <ul style="list-style-type: none">▶ If you select True, you are indicating that the event should only be executed when the specified file is present.▶ If you select False, you are indicating that the event should be executed only when the specified file does <i>not</i> exist.
Saving the event	
1	<p>Click OK.</p> <p>System response The event is saved and you exit the Event Setup dialog box.</p>
2	<p>Click OK.</p> <p>System response The system exits the Gentran:Server Process Control dialog box.</p>

Deleting Events

Introduction You are not able to delete an event unless the event is suspended.

Reference

See *Procedure: suspending an event* on page 11 - 38 for more information.

Procedure To delete an event, complete the following steps:

Step	Action
1	Click Process Control on The Desk. System response The system displays the Gentran:Server Process Control dialog box.
2	Click the Events tab to display the event options. System response The system displays the Process Control dialog box (Events tab).
3	Select an event and click Delete to delete the current selection. System response The Gentran:Server Process Control dialog box asks you to confirm the delete operation.
4	Click OK . System response The event is deleted.
5	Click OK . System response The system exits the Gentran:Server Process Control dialog box.

Viewing Events

Events tab The Gentran:Server Process Control dialog enables you to view all the events defined in your system.

On the Events tab, the following specifications are listed for each event:

- Event description
- Time
- Parameters (day of week if timed or result if polled)
- Controller on which the event runs
- Time started
- Time ended
- Session name
- Calendar name (timed events only)
- File name (polled events only)

Filtering event display

You can filter the display of events on the Events tab by the controller on which the events are scheduled to run. You can also sort the events by description, controller, and status.

Active Events tab The Active Events tab enables you to view only the events that are currently processing. This feature also allows you to view currently processing system events (such as temporary communication sessions).

Event list

On the Active Events tab, all currently processing events and the controller on which each event are being processed are listed in the Event list (on the left side of the dialog).

Session list

The Session list (on the right side of the Active Events tab) displays the session script for the event that is currently selected in the Events list. The Session list also contains all of the parameters for each command. This detailed view enables you to see which programs are currently being executed by the Gentran Executive. The session command that is currently being processed is indicated with a green arrow.

Procedure:
viewing all events

To view all events, complete the following steps:

Step	Action	
1	Click Process Control on The Desk. System response The system displays the Gentran:Server Process Control dialog box.	
2	Click the Events tab to display the event options. System response The system displays the Process Control dialog box (Events tab).	
3	If you want to filter events by the controller on which the events are run, select that controller from the Controller list.	
4	Use the following table to select the appropriate sort key from the Sort list.	
	IF you want to sort by...	THEN select this from the Sort list...
	the events listed in alphabetic order of the event descriptions	Description. Note This is the default.
	the events listed in alphabetic order of the controller	Controller.
	the events listed by: 1. currently processing events (red indicator) 2. blocked events (green indicator with red “x”) 3. activated events (green indicator) 4. suspended events (yellow indicator)	Status.
(Continued on next page)		

Step	Action
5	<p>If necessary, change the Refresh options:</p> <ul style="list-style-type: none"> <p>• If you want to change the interval in which the dialog box is automatically refreshed, type the interval (in seconds) at which you want the system to refresh the dialog box (the default is 20 seconds) in the Seconds box. Valid values are 2 – 300 seconds.</p> <p>Note This value is saved when you change focus on the dialog box (click another box). The Auto Refresh check box must be selected (checked) for the Seconds box to be available.</p> <p>• If you do not want the Events tab on the Gentran:Server Process Control dialog box to automatically refresh (so you have to manually click Refresh), click the Auto Refresh check box to deselect it.</p> <p>Note The default for automatic refresh (so you do <i>not</i> have to click Refresh) is enabled (checked).</p>
6	<p>Click OK.</p> <p>System response The system exits the Gentran:Server Process Control dialog box.</p>

Procedure viewing active events

To view active events, complete the following steps:

Step	Action
1	<p>Click Process Control on The Desk.</p> <p>System response The system displays the Process Control dialog box (Active Events tab).</p>
2	<p>From the Event list, select the event for which you want to view further detail.</p> <p>Note The system displays each command and its associated parameters in the session script for that event in the Session list. The session command currently being processed is indicated with a green arrow.</p> <p style="text-align: right;">(Continued on next page)</p>

Step	Action
3	<p>If necessary, change the Refresh options:</p> <ul style="list-style-type: none"> • If you want to change the interval in which the dialog box is automatically refreshed, type the interval (in seconds) at which you want the system to refresh the dialog box (the default is 20 seconds) in the Seconds box. Valid values are 2 – 300 seconds. <p>Note This value is saved when you change focus on the dialog box (click another box). The Auto Refresh check box must be selected for the Seconds box to be available.</p> <ul style="list-style-type: none"> • If you do not want the Active Events tab on the Gentrans:Server Process Control dialog box to automatically refresh (so you have to manually click Refresh), click the Auto Refresh check box to deselect it. <p>Notes</p> <ul style="list-style-type: none"> • The default for automatic refresh (so you do <i>not</i> have to click Refresh) is enabled (checked). • The default interval for refreshing the Event list is 10 seconds. • The default for refreshing the display of the Session list is 2 seconds. • If the Active Events tab has not been refreshed after an event has expired (is no longer active), the system displays the event on the Active Events tab (even though it is inactive), until the Active Events tab is refreshed.
4	<p>Click OK.</p> <p>System response The system exits the Gentrans:Server Process Control dialog box.</p>

Activating and Suspending Events

Introduction

The Events tab of the Gentran:Server Process Control dialog enables you to change the status of an event by *activating* or *suspending* the event. The indicator in the far left column of the list on the Events tab registers the status of the event. The indicator can be one of the following colors:

- **Red**—the event is currently executing and you are not able to edit the event until processing completes.
- **Yellow**—the event is suspended (and is not processed until activated).
- **Green**—the event is activated for processing.
- **Green with red “x”**—the event is activated for processing but is currently blocked because the number of currently processing events is equal to the limit of events that may concurrently execute.

Reference

See How to Change Controller Settings in the *Administration Guide* for more information about setting a limit for the number of process control events that can execute concurrently.

Procedure: activating an event

To activate an event, complete the following steps:

Step	Action
1	Click Process Control on The Desk. System response The system displays the Process Control dialog box (Active Events tab).
2	Click the Events tab to display the event options. System response The system displays the Process Control dialog box (Events tab).
3	Select the suspended event that you want to activate and click Activate .
4	Click OK . System response The system exits the Gentran:Server Process Control dialog box.

Procedure:
suspending an
event

To suspend an event, complete the following steps:

Step	Action
1	Click Process Control on The Desk. System response The system displays the Process Control dialog box (Active Events tab).
2	Click the Events tab to display the event options. System response The system displays the Process Control dialog box (Events tab).
3	Select the activated event that you want to suspend and click Suspend . Note If an event is currently processing, you are not able to suspend it until processing has terminated.
4	Click OK . System response The system exits the Gentran:Server Process Control dialog box.

Executing an Event Immediately

Introduction

The Events tab of the Gentran:Server Process Control dialog enables you to execute the selected event immediately. This function allows you to manually invoke an unattended session and also enables you to test a new event or an event that failed.

Procedure

To execute an event immediately, complete the following steps:

Step	Action	
1	Click Process Control on The Desk. System response The system displays the Process Control dialog box (Active Events tab).	
2	Click the Events tab to display the event options. System response The system displays the Process Control dialog box (Events tab).	
3	Select the suspended event that you want to execute immediately and click Execute . System response Use this table to determine the system response.	
	IF the system displays this message...	THEN you should...
	This event is scheduled to execute next at <scheduled time>. Do you want to run it now anyway?	<ul style="list-style-type: none"> ▶ Click OK to run the event immediately. OR ▶ Click Cancel to cancel the request (the event will execute at its scheduled time).
	Run <event name> immediately?	
4	Click OK . System response The system exits the Gentran:Server Process Control dialog box.	

Calendars

Overview

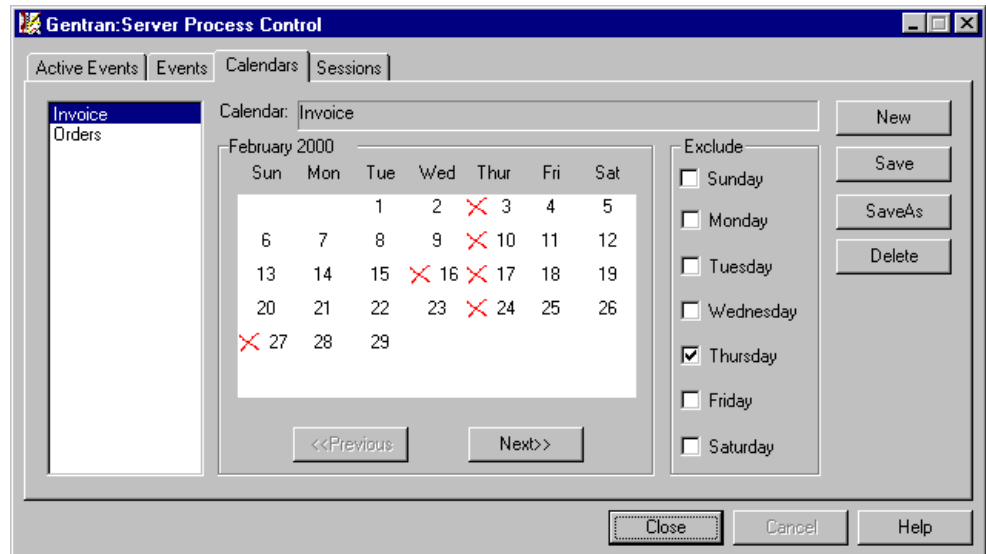
Introduction

The process control Calendar feature enables you to configure system calendars that excludes specific dates (such as holidays) or days of the week from processing.

Like session definitions, these calendars are defined independently from the event, so that they can be “attached” to multiple event entries. The calendar begins with the current month and year.

Process Control dialog box (Calendars tab)

The following illustrates the Calendars tab of the Process Control dialog box:



Calendars tab parts and functions

The following lists the parts of the Process Control dialog box Calendars tab and their functions:

Part	Function
(Calendars list)	Displays a list of all defined calendars.
(Calendar)	Displays the current month of the selected calendar.

(Continued on next page)

Part	Function
Previous	Displays the previous month in the calendar. Note This button is only activated if a calendar is selected and a previous month exists for the calendar.
Next	Displays the next month in the calendar. Note This button is only activated if a calendar is selected.
Exclude	Select which days of the week to exclude from processing. These are displayed with red Xs through them.
New	Accesses the New Calendar dialog box so you can create a new calendar.
Save	Saves the current calendar. Note The Save command is only active if a calendar is displayed in the middle of the dialog box.
Save As	Saves the current calendar under another name. Note The Save As command is only active if a calendar is displayed in the middle of the dialog box.
Delete	Deletes the selected calendar.

Creating and Editing Calendars

Procedure To create or edit a calendar, complete the following steps:

Step	Action
1	Click Process Control on The Desk. System response The system displays the Gentran:Server Process Control dialog box.
2	Click the Calendars tab. System response The system displays the Process Control dialog box (Calendars tab).
3	Do you want to create a new calendar? <ul style="list-style-type: none"> ▶ If <i>yes</i>, click New. System response The system displays the New Calendar dialog box. <ul style="list-style-type: none"> ▶ If <i>no</i>, select the calendar that you want to edit and continue with Step 6. System response The system displays the calendar in the center of the Calendars tab.
4	In the Calendar Name box, type the new calendar name using up to 8 alphanumeric characters.
5	Click OK to add the new calendar. System response The system displays the new calendar in the middle of the Calendars tab.
6	Do you want to exclude a specific date from processing? <ul style="list-style-type: none"> ▶ If <i>yes</i>, click that date on the calendar and continue with Step 7. ▶ If <i>no</i>, continue with Step 7. Note The system displays a mark for that date on the calendar to signify that it is excluded from processing. Click Previous or Next to access the preceding or succeeding calendar months in the calendar. (Continued on next page)

Step	Action
7	<p>Do you want to exclude a specific day or days of the week?</p> <ul style="list-style-type: none"> ▶ If <i>yes</i>, select the check box in the Exclude section for each day of the week that you want to exclude from processing and continue with Step 8. ▶ If <i>no</i>, continue with Step 8. <p>Notes</p> <ul style="list-style-type: none"> ▶ You can select one or more days of the week on which you <i>never</i> want processing to occur. ▶ The system allows you to exclude all seven days of the week, if that is your intention. In this situation, processing never occurs. ▶ To deselect a day, clear the check box.
8	Click Save to save the new calendar.
9	<p>Click OK.</p> <p>System response The system exits the Gentran:Server Process Control dialog box.</p>

Deleting Calendars

Procedure To delete a calendar, complete the following steps:

Step	Action
1	Click Process Control on The Desk. System response The system displays the Gentran:Server Process Control dialog box.
2	Click the Calendars tab. System response The system displays the Process Control dialog box (Calendars tab).
3	Select a calendar and click Delete to delete the current selection. System response The Gentran:Server Process Control dialog box asks you to confirm the delete operation.
4	Click Yes to delete the current selection.
5	Click OK . System response The system exits the Gentran:Server Process Control dialog box.

GLOSSARY
Glossary

?In Documents This browser contains a list of documents that were received by the system but failed compliance checking or that do not have an identifiable partner or transaction set.

?Out Documents This browser contains a list of documents that were imported into the system but are invalid.

acknowledgement Indicates the ANSI 997 functional acknowledgement, the EDIA 999 acceptance/rejection advice, and the EDIFACT CNTRL.

ack This function enables you to manually change the status of documents in the Out Drawer to “Ack’d” (acknowledged).

AIAG The Automotive Industry Action Group (AIAG) is 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. The ANSI X12 committee is the main EDI standards-setting organization for the United States.

application system Computer systems designed to fulfill specific business functions. These include accounting, purchasing, materials control, human resources, shipping, and other systems.

asynchronous Communication among distributed processes in which data can be transmitted intermittently rather than in a steady stream.

audit log This function enables you to view system audit log information.

authorization	Permission to access a protected resource, service, or sensitive 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	Indicates 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 using right-handed or left-handed mouse operation.
cluster	A set of computers that work together to provide a service. The use of a cluster enhances both the availability and scalability of the service. The Windows operating systems provide a software solution for clustering multiple computers running networked client/server applications.
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:Server 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.
compliance	An implementation is compliant if and only if it fully meets each and every requirement of the standards specification. Specifically, each transaction, action, or data element produced by the implementation must be valid as defined by the standard. Compliance testing is the act of comparing the operation of an implementation against the specified requirements to determine compliance or noncompliance.
compliant	This means 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.
cryptographic keys	Cryptographic keys are central to cryptographic operations and must be kept secret because whoever possesses a particular key has access to any data with which the key is associated. For example, if a key is used to encrypt a file, anyone with a copy of that key can decrypt the file. Furthermore, anyone possessing a key used to sign messages can forge that message signature.
copy	This function enables you to copy one or more documents from the Out Drawer to the Workspace.
data-view windows	<p>The following are data-view windows in the Gentran:Server:</p> <ul style="list-style-type: none"> • 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 <i>unless</i> you specifically override them.
Desk, The	<p>This is a graphic representation of Gentran:Server that provides an easy way to access some of the most commonly used browsers, functions, and subsystems of Gentran:Server. You can click the appropriate part of The Desk any time you need to access a browser, function, or subsystem represented there. The following are the browsers you can access:</p> <ul style="list-style-type: none"> • In Documents • ?In Documents • Workspace • Out Documents • ?Out Documents • Interchanges • In Drawer • Out Drawer

(Continued on next page)

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), and allows you to quit Gentran:Server (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) contains 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.

digital certificate

A digital certificate is a common credential that provides a means to verify identity. A certificate is a set of data that identifies an entity. A trusted organization assigns a certificate to an individual or an entity that associates a public key with the individual. The individual or entity to which a certificate is issued is known as the subject of that certificate. The trusted organization that issues the certificate is a Certification Authority (CA) and is known as the certificate’s issuer. A trustworthy CA will only issue a certificate after verifying the identity of the certificate’s subject. The data in a certificate includes the public cryptographic key from the certificate subject’s public/private key pair.

digital signature

The essence of public key encryption is that your data is encoded with a complex mathematical formula that returns two keys. Data encrypted with the first key can only be decrypted with the second key and data encrypted with the second key can only be decrypted with the first. You distribute your first key as a public key that anyone can have and keep your second key as a private key that no one but you has access to. The reciprocal relationship between the keys allows anyone to encrypt data with your public key, and then you can decrypt it with your private key. No one else has access to the data once it is encrypted, including the person who encrypted it. Similarly, you can encrypt data with your private key, and then anyone can decrypt that data with your public key. Although this makes the data freely available, but it ensures that only you could have created it.

document	<p>One transaction set containing 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 items, if it is one purchase order, it is one document.</p> <p>If a trading partner sends you a communication containing 10 purchase orders, you have received 10 documents. If the communication contains 15 invoices, you have received 15 documents.</p>
double-click	<p>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 using right-handed or left-handed mouse operation.</p>
DTD	<p>A DTD (document type definition) is a type of schema used to specify the structure and semantics of an XML document or message.</p>
EANA	<p>International Article Numbering Association, based in Brussels, Belgium.</p>
EDI	<p>Electronic Data Interchange (EDI) is the process by which companies can exchange business documents directly from application to application by computer without paper documents being produced.</p>
EDI standard	<p>The rules for translating a business document into an EDI document.</p>
EDIA	<p>The Electronic Data Interchange Association, formerly known as the Transportation Data Coordinating Committee (TDCC).</p>
EDIFACT	<p>Electronic Data Interchange for Administration, Commerce, and Transport.</p>
element	<p>The smallest piece of usable information defined by the standards. Examples might include a quantity, unit price, or description.</p> <p>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.</p>

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There are three types of data elements, as illustrated in the table below:

Data Element	Definition
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. There are three levels of envelopes:

Transaction Set

Each transaction set (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.

Interchange Envelope

All material being sent to one trading partner in one communication. The term 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.

Note

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.

export

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

fail over	A failover system is a backup operation that automatically switches to a standby database, server, or network if the primary system fails or is temporarily shut down for servicing. Fail over is an important fault tolerance function of mission-critical systems that rely on constant accessibility. Fail over automatically (and, to the user, transparently) redirects requests from the failed or down system to the backup system that mimics the operations of the primary system.
find	This function 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. For example, a Functional Group may be defined as containing all purchasing transaction sets.
header	Control information prepended to data content, normally used to describe the data or the relationship of the data with the applications.
import	This command 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	This browser contains a list of documents that the system received but that have not yet been processed by the user. Once the documents are processed (printed or exported), they are transferred to the In Drawer.
In Drawer	This browser contains a list of documents that were received and processed.
interchange	Contains all functional groups of documents (transaction sets) sent from one sender to one receiver in the same transmission.
Interchanges browser	This browser enables you to view a hierarchical list of all the interchanges that were sent or received. It contains status information about the interchanges (such as whether or not a functional acknowledgement was received and the status of that acknowledgement). This browser also enables you to access the documents within the interchanges. The Interchanges browser can always be accessed.
label	Descriptions of information that can be almost anything on a translation object that is not an element, a keyword title, or an information indicator. They can also be used as information dividers, such as a line of dashes.

menu	A list of actions from which you can choose. Unavailable items on a menu are dimmed to inform you they are disabled.
menu bar	Displays the list of menus for the application.
move	This functions enables you to move a document or group of documents either from In Documents or ?In Documents to the In Drawer or from ?Out Documents to the Workspace.
network	Also known as a Third Party Network or Value-Added Network (VAN). A service, such as Sterling Information Broker, that accepts and holds transmissions from companies until it is convenient for a trading partner to accept them.
non-repudiation	<p>Non-repudiation is the ability of a message transfer system to provide unforgeable evidence that a specific action occurred. The following are the three most common types of non-repudiation services:</p> <ul style="list-style-type: none"> • Non-repudiation of origin—Protects against any attempt by a message originator to deny sending a message. • Non-repudiation of submission—Protects against any attempt by a message transfer agent to deny that a message was submitted for delivery. • Non-repudiation of delivery—Protects against any attempt by a message recipient to deny receiving a message.
ODETTE	The Organization for Data Exchange by Tele-Transmission, based in Europe.
Out Documents	This browser contains a list of documents that are ready to be sent. After the documents are successfully sent, they are automatically transferred to the Out Drawer.
Out Drawer	This browser contains a list of documents that were successfully sent by the system.
partner	Another firm with which your company trades documents. Also referred to as a trading partner.
Partner Editor	This function enables you to define, edit, and delete partner information for your company and your trading partners.

post	This function enables you to move compliant documents from the Workspace to Out Documents.
predefined	On a data entry translation object, a default value for a particular element. You can change the value as necessary.
print	This command enables you to print a formatted or unformatted version of the selected documents using the print translation object set up in the partner relationship for those documents. This command also enables you to print a summary list of the documents.
printout	Produced when data received from a trading partner passes through a print translation object. You do not have to print the data; it can be “printed” to a file on your hard disk.
receive	This function enables you to manually initiate a communications session to receive data from your trading partner.
respond	This function 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 useful information. Segments are defined by the EDI standards. A number of segments together form a transaction set.
send	This function 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, <i>all</i> documents are sent. Successfully sent documents are moved to the Out Drawer.

Send Queue	This function enables you to display a list of documents currently queued to be sent.
set	See Transaction Set.
sort	This function enables you to sort the list of documents in a document browser into one of the following sequences: <ul style="list-style-type: none"> • partner/type/name • partner/name/type • type/partner/name
status	The processing stage of a document or interchange, indicated in the “Status” box.

?In Documents

- NotOK All documents in the ?In Documents have this status. This code indicates one of the following:
- 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.
 - 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.
 - 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.
 - 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.
-

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?Out Documents

NotOK 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.

In Documents

OK All documents in the In Documents have a status of “OK.” These documents are fully compliant and are eligible for further processing.

In Drawer

OK This code indicates that the documents are fully compliant with the EDI standard and are eligible for further processing.

NotOK All documents in the ?In Documents have this status. This code indicates one of the following:

- 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.
- 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.
- 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.
- 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.

Interchanges

The Interchanges browser contains graphics that represent the interchange process status, interchange network status, interchange, group, document acknowledgement 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:Server status bar.

(Continued on next page)

Interchange Process Status

Received (green) Indicates that the interchange was received by the system.

Sent (green) Indicates that the interchange was successfully transmitted to the appropriate partner.

Ready to Send

(blue) Indicates that an attempt was made to send this interchange, but the communication session was not successful. This interchange will be sent during the next appropriate communication session.

Queued Indicates that the document is queued to be sent.

Hold Indicates that the document is on hold (not sent).

Overdue Indicates that the interchange is waiting to be reconciled with an inbound functional acknowledgement but has exceeded the number of hours by which that acknowledgement is deemed late.

Send Failed (red) Indicates that the send attempt failed due to an error during the communications process.

Interchange Network Status

On Network

Indicates that the interchange was successfully delivered to a value-added network (VAN). (To obtain this status using Sterling Information Broker, you must have your mailbox configured to receive the 20 report in data format).

Network Warning

Indicates that the interchange was delivered to a VAN, which 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 Sterling Information Broker, you must have your mailbox configured to receive the 20 report in data format).

Network Error

Indicates that the interchange was delivered to a VAN, which 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 Sterling Information Broker, you must have your mailbox configured to receive the 20 report in data format).

Picked Up

Indicates that the interchange was successfully delivered to a trading partner through a VAN. (To obtain this status using Sterling Information Broker, you must have your mailbox configured to receive the 70 report in data format).

Transmitted to third-party network



Indicates that the interchange was transmitted to a third-party network.

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Interchange, Group, and Document Acknowledgement Status

Waiting	Indicates that the interchange is waiting to be reconciled with an inbound functional acknowledgement.
Overdue	Indicates that the interchange is waiting to be reconciled with an inbound functional acknowledgement but has exceeded the number of hours by which that acknowledgement is deemed late.
Rejected	Indicates that the interchange was acknowledged by your partner and there were errors. The interchange was rejected by your partner.
Acknowledged	Indicates that the interchange was acknowledged by your partner and there were no errors.
Acknowledged with Errors	Indicates that the interchange was acknowledged by your partner and there were errors. It was accepted by your partner in spite of the errors.
Partially Acknowledged	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.

Document Compliance Status

	OK	This code indicates that the documents are fully compliant with the EDI standard and are eligible for further processing.
	NotOK	This code indicates one of the following: <ul style="list-style-type: none"> • 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. • 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. • 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.

(Continued on next page)

- 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.



Duplicate The document has the same name as another document on the system.

Out Documents

OK This code indicates that the document is fully compliant with the EDI standard. Documents with this status can be sent.

Out Drawer

Sent This code indicates that the document was successfully transmitted to the appropriate partner.

Waiting This code indicates that the document is waiting to be reconciled with an inbound functional acknowledgement.

Overdue This code indicates that the document is waiting to be reconciled with an inbound functional acknowledgement, but has exceeded the number of hours by which that acknowledgement is deemed late.

Ack'd This code indicates that the document was acknowledged by your partner and there were no errors.

AckErr 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.

Reject This code indicates that the document was acknowledged by your partner and there were errors. The document was rejected by your partner.

~Ack This status is only displayed if there were no acknowledgements expected for this document and either the group or the interchange was partially acknowledged. If your partner is going to issue partial acknowledgements at the interchange or group level, he/she should also indicate acceptance or rejection at the transaction level.

OnNet This code indicates that the document was successfully delivered to a VAN. (To obtain this status using Sterling Information Broker, you must have your mailbox configured to receive the 20 report in data format).

(Continued on next page)

- PickedUp** This code indicates that the document was successfully delivered to a trading partner through a VAN. (To obtain this status using Sterling Information Broker, you must have your mailbox configured to receive the 70 report in data format).
- NetWarn** This code indicates that the document was delivered to a VAN, which 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 Sterling Information Broker, you must have your mailbox configured to receive the 20 report in data format).
- NetErr** This code indicates that the document was delivered to a VAN, which 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 Sterling Information Broker, you must have your mailbox configured to receive the 20 report in data format).

Send Queue

- Queued** 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 will be automatically sent in the next communication session with this partner.
- Ready to Send**
Indicates that a document is ready to send but a mailbox message has not yet been created for the data.
- Send Failed**
Indicates that the send attempt failed due to an error during the communications process.

Workspace

- OK** This code indicates that the document is fully compliant with the EDI standard. Documents with this status can be posted to Out Documents and sent.
- NotOK** This code indicates 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.

status bar

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

synchronous	A mode of coordination of communication among distributed processes that requires request-reply pairs to occur within the bounds of a specified time interval in which the communication session is “live.”
TDCC	See EDIA.
translation object	<p>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.</p> <p>Inbound Translation Objects</p> <p>Turn Around: This translation object is used when a document is received to create the natural response document that contains as many elements from the received document as possible.</p> <p>Export File: This translation object indicates that when a document is received, it is exported to a specified file format.</p> <p>Print: This translation object is used to print documents.</p> <p>Outbound Translation Objects</p> <p>Import: This translation object is used to import data from an application file.</p> <p>Print: This translation object is used to print documents.</p> <p>Data Entry: This translation object is used to enter data into the Document Editor facility.</p>
third-party network	See Network.
title bar	The title bar of an application window contains 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	This function 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 company 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 an 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 a “message” in Europe.
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	The Uniform Communications Standard is 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	A formal update of an EDI standard. Each standards-setting body updates its standards on a regular basis.
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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