

IBM Sterling Gentrans:Server for Microsoft Windows

**Forms Integration
TRADACOMS Tutorial Guide**
Version 5.3



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Table of Contents

Preface	About This Guide	
	▶ Introduction	viii
	▶ What's in this manual	ix
	▶ Description of Contents	x
	▶ Online Help	xi
	▶ Getting Support	xii
Chapter 1	Getting Started	
	▶ Introducing Forms Integration	1-2
	▶ Navigation	1-3
	▶ EDI File Format Pane	1-6
	▶ Layout Pane	1-8
	▶ Building a Form with Forms Integration	1-9
	▶ How to Launch Forms Integration	1-11
	▶ How to Install Sterling Gentran Standards	1-12
Chapter 2	Creating a Print Form	
	Overview	2-3
	▶ Introduction	2-3
	▶ Phases of Designing a Form	2-5
	▶ Getting Started	2-6
	Analyze the EDI File	2-7
	▶ Basic Tasks	2-7
	Design and Create the Form	2-18
	▶ Verifying the Global EDI Date Formats	2-18
	▶ Defining the Type of Form	2-19
	▶ Loading the ORDHDR Message	2-23
	▶ Activating Groups, Segments, Composites, and Elements	2-24
	▶ Verifying EDI Delimiters	2-28
	Modify Form Components	2-30
	▶ Promoting the ORDHDR Group to the Parent Frame	2-30
	▶ Creating an OTR Group	2-31
	▶ Generating the Form	2-34
	Customize the EDI Data	2-37
	▶ Overview	2-37
	▶ Customizing the ORDHDR Group	2-39
	▶ Customizing the TYP Segment	2-40

Customize the EDI Data	3-39
▶ Overview	3-39
▶ Customizing the CLO Segment	3-41
▶ Customizing the IRF Segment	3-50
▶ Customizing the PYT Segment	3-54
▶ Customizing the DNA Segment	3-57
▶ Customizing the ODD Group	3-61
▶ Customizing the ILD Group	3-68
▶ Customizing the ILD:2 Segment	3-70
▶ Producing the VAT Summary and the Invoice Trailer	3-105
Format the Screen Entry Form	3-113
▶ Overview	3-113
▶ Arranging the Fields on the Invoice Details Frame	3-115
▶ Arranging the Fields on the Line Items Frame	3-131
▶ Arranging the Fields on the VAT Summary Frame	3-139
▶ Changing the Invoice Details Frame Title	3-143
Finalize the Form	3-144
▶ Overview	3-144
▶ Compiling the Form	3-145
▶ Printing the Report	3-147
▶ Testing the Translation Object	3-148

Notices

Glossary

About This Guide

Contents

- ▶ Introduction viii
- ▶ What's in this manualix
- ▶ Description of Contents. x
- ▶ Online Helpxi
- ▶ Getting Supportxii

Introduction

Welcome Welcome to IBM® Sterling Gentran:Server® for Microsoft Windows Forms Integration subsystem, an Electronic Data Interchange (EDI) form-generation software for the Microsoft Windows operating system. Sterling Gentran:Server provides you with the tools that you need to design forms to facilitate the keying and printing of EDI documents.

What's in this manual

Overview This manual contains a tutorial for Sterling Gentran:Server Forms Integration, using the TRADACOMS 92.1 standard. This tutorial includes a print form example (purchase order) and a screen entry form example (invoice). The purpose of this tutorial is to break the form creation process into concise and understandable steps, using examples that enable you to understand and master the tasks and processes required to create your own forms.

Complete the print form tutorial first. After you have mastered the steps involved in creating a print form, you can begin the tutorial for the screen entry form.

Related manuals To access reference information, refer to the online Help or *IBM® Sterling Gentran:Server® for Microsoft Windows Forms Integration User Guide*. For additional information on the various tasks described in this manual, refer to the *IBM® Sterling Gentran:Server® for Microsoft Windows Forms Integration User Guide*.

Intended audience This manual is intended for the following users:

- Technical users—users with a detailed knowledge of the Microsoft Windows operating system, networking, databases, and communications.
- Novice-to-average experienced users—users who are new to Sterling Gentran:Server, EDI, or both.
- EDI Coordinators—users responsible for creating and maintaining the transfer of EDI data between Trading Partners.

Prerequisite knowledge The audience using this software should be familiar with:

- PC and Microsoft Windows functions
- EDI concepts
- EDI standard structure
- the internal application format
- data mapping concepts
- Sterling Gentran:Server

Description of Contents

Overview The Forms Integration TRADACOMS Tutorial contains the tasks associated with using the Forms Integration subsystem.

Organization of chapters The tutorial guide is organized into the following chapters:

- Chapter 1, Getting Started, explains the content, organization, conventions, and system requirements. This chapter describes how to build forms and how to customize global EDI date formats.
- Chapter 2, Creating a Print Form, explains the tasks necessary to create a print form for an TRADACOMS purchase order (ORDERS).
- Chapter 3, Creating a Screen Entry Form, explains the tasks necessary to create a screen entry form for an TRADACOMS invoice (INVOIC).
- The Glossary contains definitions of Forms Integration and Sterling Gentran:Server terms and concepts.

Online Help

Overview

The majority of the *IBM® Sterling Gentran:Server® for Microsoft Windows Forms Integration User Guide* documentation is also contained in the online Help system.

Getting Support

How To Get Help

IBM® Sterling Customer Center provides a wealth of online resources that are available around the clock to enrich your business experience with IBM® Sterling Gentran®. By using Sterling Customer Center, you gain access to many self-support tools, including a Knowledge-Base, Documentation, Education, and Case Management. Access this site at: Sterling Customer Center. (<http://customer.sterlingcommerce.com>)

Once logged in, select **Support Center** from the top navigation menu, and then locate Sterling Gentran product-specific support information from the left navigation menu.

Additionally, our Customer Support Reference Guide outlines our support hours, contact information, and key information that will enhance your support experience with us. For detailed information about Customer Support, please refer to the Customer Support Reference Guide accessible from the login page. (<http://customer.sterlingcommerce.com>)

Getting Started

Contents

- Introducing Forms Integration 1 - 2
 - Navigation 1 - 3
 - EDI File Format Pane 1 - 6
 - Layout Pane 1 - 8
 - Building a Form with Forms Integration 1 - 9
 - How to Launch Forms Integration 1 - 11
 - How to Install Sterling Gentran Standards 1 - 12
-

Introducing Forms Integration

Overview The Sterling Gentran:Server Forms Integration subsystem enables you to design forms to facilitate the keying (screen entry) and printing (print) of EDI messages that you receive inbound or send outbound.

What is a form? A form is a set of instructions you define in the Forms Integration subsystem that indicates how the system should format data. When you compile the form, Sterling Gentran:Server generates a translation object. After you register the translation object with Sterling Gentran:Server and associate the translation object with a partner relationship, the system uses the translation object to format EDI messages. The Forms Integration subsystem enables you to create print and screen entry translation objects.

What is a print translation object? A print translation object organizes and formats the printout of EDI messages that are received from or sent to the trading partner(s) for which you have established a trading relationship (inbound or outbound) that utilizes that print translation object. The print translation object enables you to view the EDI message in an easily readable format.

What is a screen entry translation object? A screen entry translation object provides a standardized format for keying an EDI message into the Document Editor, for translation and transmission to your trading partner(s), for which you have established an outbound trading relationship that utilizes that screen entry translation object. The screen entry translation object ensures that your users key all the data necessary to create the required EDI message.

Sterling Gentran:Server generates the actual format of the translation object based on the EDI file format (in the EDI File Format Pane), and displays it in the Layout Pane.

Navigation

Overview

The Sterling Gentran:Server Forms Integration Window allows you to access its functionality in four different ways, as follows:

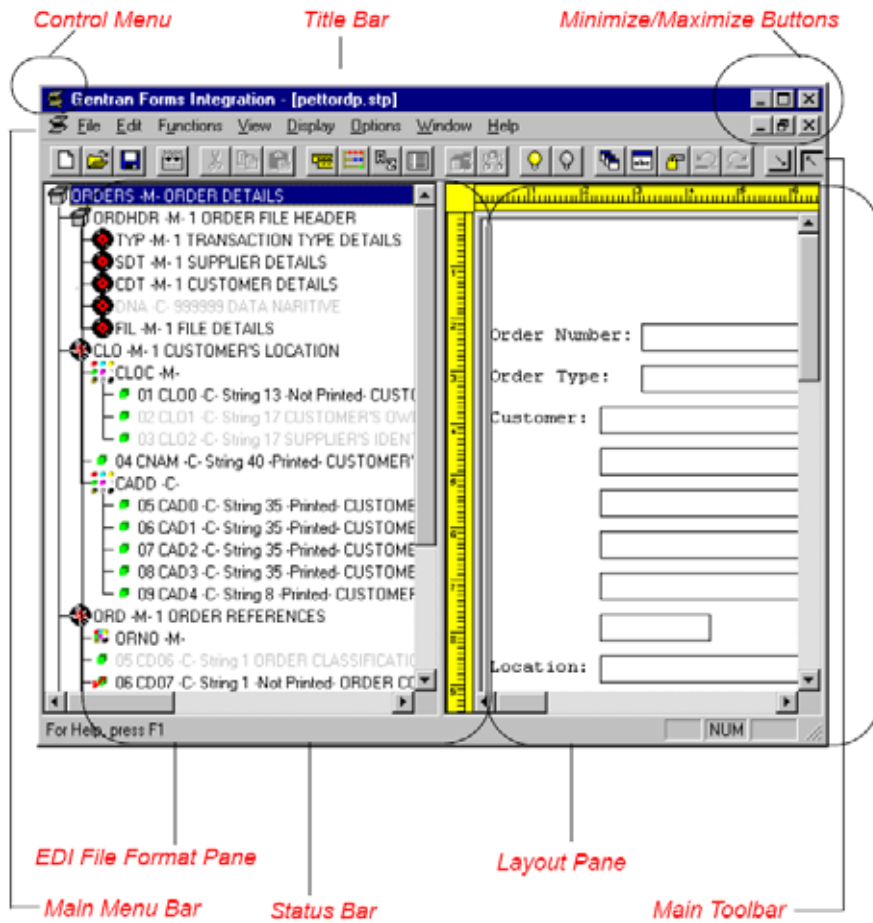
- ▶ Click the menu option from the Main Menu Bar.
- ▶ Click the appropriate button on the Main Toolbar.
- ▶ Click or double-click the appropriate part of the form.
- ▶ Click a form component (EDI File Format Pane or Layout Pane) with the right mouse button to access a shortcut menu that contains all the functions that are currently available for that form component. The shortcut menus enable you to quickly and easily access available functionality. The content of the shortcut menus will vary, depending on the type and level of the selected form component.

Note

When you start Sterling Gentran:Server, the Main Menu Bar contains a subset of menu items. The full set of menu items is displayed after you create a new form or open (load) an existing form.

Forms Integration Window

This diagram illustrates the Forms Integration Window.



Forms Integration Window parts and functions

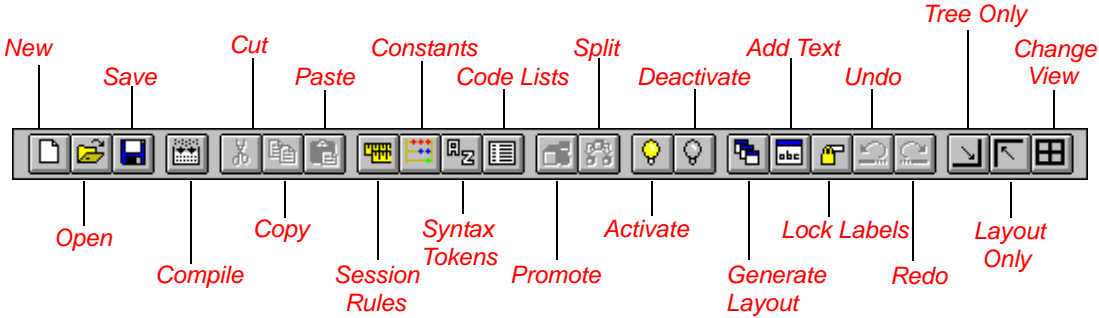
This table describes the parts of the Sterling Gentran:Server Forms Integration Window.

Part	Function
Main Menu Bar	<p>The Main Menu Bar contains the drop-down menus. Unavailable items are dimmed.</p> <p>Note Detailed descriptions of each of the commands on these menus are found in the online Help.</p>
Main Toolbar	<p>The Main Toolbar gives you access to some of the most common operations in Sterling Gentran:Server.</p>

(Contd) Part	Function
EDI File Format Pane	The EDI File Format Pane contains the EDI file format. When you click a segment or group in the EDI file format, the corresponding frame is displayed in the Layout Pane. When you click an element in the EDI file format, the corresponding layout component is highlighted in the Layout Pane.
Layout Pane	The Layout Pane contains the actual format of the translation object. Each group (with a maximum usage greater than one) and repeating segment has a corresponding frame in the Layout Pane. When you click a segment or group in the EDI file format, the corresponding frame is displayed in the Layout Pane. When you click an element in the EDI file format, the corresponding layout component is highlighted in the Layout Pane.
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, etc.).

Main Toolbar

The Main Toolbar gives you access to some of the most common operations in Sterling Gentrans:Server. Unavailable items are dimmed. The Main Toolbar is a dockable toolbar, so you can affix it to any edge of the client window. This diagram illustrates the Main Toolbar.



EDI File Format Pane

Overview The EDI File Format Pane (left side of the Forms Integration subsystem main window) contains the EDI file format. The EDI file must contain all the information that you need to include to either create a message using the Document Editor (screen entry translation object) or print messages (print translation object), so that your system can accurately process the data.

Generating EDI files Sterling Gentran:Server will generate an EDI file for you, based on the standard (agency), version, transaction set, and release (for the TRADACOMS standard *only*) you selected. The system includes all the groups, segments, composites, and elements that are defined by the standards agency for the version of the message you selected.

Reference

See *Defining the Type of Form* on page 2 - 19 (print) or *Defining the Type of Form* on page 3 - 22 (screen entry) for more information on generating an EDI file when you create a new form.

You will typically need to customize the system-generated EDI file by modifying the properties of the form components, and using specialized Sterling Gentran:Server functions to manipulate the EDI file structure.

Generating specialized EDI standard versions

If you want to use a specialized version of an EDI standard that is not available in the Sterling Gentran Standards database, it may be appropriate for you to define the EDI file yourself.





Regardless of whether the system generates the EDI file or you define it, the specific EDI form components that you will use will depend on the type of form you are creating. This includes the standard, version, and transaction set (message) selected, and which groups, segments, composites, and elements your company requires. We recommend that you determine which form components you will be using before generating or defining an EDI file.

Form components

This table described the form components that Sterling Gentran:Server uses to define the EDI file format.

Note

When an element has an operation performed against it, a red checkmark is displayed over the element icon.

Icon	Description
	<p>A group is a looping structure that contains related segments and/or groups that repeat in sequence until either the group data ends or the maximum number of times that the loop is allowed to repeat is exhausted. Groups are defined by the EDI standards. A group that is subordinate to another group is a sub-group (this corresponds to a nested looping structure – a loop within a loop). The EDI file is a group and therefore, it is visually represented the same way as other groups and sub-groups in Sterling Gentran:Server.</p>
	<p>A segment contains a group of related elements or composite data elements that combine to communicate useful data. Segments are defined by the EDI standards. A segment can occur once or can repeat multiple times.</p>
	<p>A composite is a data element that contains two or more component data elements or sub-elements. Composites are defined by the EDI standards that use them (EDIFACT, TRADACOMS, and certain ANSI X12 standards).</p>
	<p>An element is the smallest piece of information defined by the EDI standards. An individual element can have different meanings depending on the context. Therefore, elements are normally not considered to have useful meaning until they are combined into segments.</p> <ul style="list-style-type: none"> ▶ When a field has a mapping operation performed against it, a red checkmark is displayed over the field icon. ▶ When a field contains a standard rule a black asterisk appears to the right of the element icon.

Layout Pane

Overview The Layout Pane (right side of the Forms Integration subsystem main window) contains the actual format of the translation object. Sterling Gentran:Server uses *frames* to format the EDI file for the translation object. Each frame contains the groups, repeating segments, and elements at that level (single segments are not represented on the frame).

List formats For screen entry translation objects, groups (with a maximum usage greater than one) and repeating segments are formatted as list boxes. Elements are formatted as edit boxes (fields) or drop-down list boxes on the frame. Elements will typically be formatted as fields, but will be formatted as a drop-down list box if you apply a standard rule that allows a selection of multiple items. Each group and repeating segment also has a corresponding frame that contains all the groups (with a maximum usage greater than one), repeating segments, and elements at that level.

Field formats For print translation objects, groups, repeating segments, and elements are always formatted as fields. Each group and repeating segment also has a corresponding frame that contains all the groups (with a maximum usage greater than one), repeating segments, and elements at that level.

Displaying information When you click a segment or group in the EDI File Format Pane, the corresponding frame is displayed in the Layout Pane. When you click an element in the EDI File Format Pane, the corresponding layout component is highlighted in the Layout Pane.

Building a Form with Forms Integration

Overview This section defines how to proceed with building a form using the Sterling Gentran:Server Forms Integration subsystem.

Stages of building a form This table describes the steps required to build a form using Forms Integration.

Stage	Description
1	<p>Prepare and Analyze. Obtain a layout of how you want the form to be displayed and determine how it corresponds to the EDI standard you will be using. Determine what operations need to be performed to generate the required layout.</p>
2	<p>Set Global Defaults (first time only). The first time you use Sterling Gentran:Server, you should establish the default date format that the system will use.</p> <p>Reference See <i>Verifying the Global EDI Date Formats</i> on page 2 - 18 (print) or <i>Verifying the Global EDI Date Formats</i> on page 3 - 21 (screen entry) for more information.</p>
3	<p>Create, Save, and Name a New Form.</p> <p>Reference See <i>Design and Create the Form</i> on page 2 - 18 (print) or <i>Design and Create the Form</i> on page 3 - 21 (screen entry) for more information.</p>
4	<p>Activate the Appropriate EDI Groups, Segments, Composites, and Elements.</p> <p>Reference See <i>Activating Groups, Segments, Composites, and Elements</i> on page 2 - 24 (print) or <i>Activating Groups, Segments, Composites, and Elements</i> on page 3 - 26 (screen entry) for more information.</p>
5	<p>Promote, Split, and Change Segments and Groups.</p> <p>Reference See <i>Modify Form Components</i> on page 2 - 30 (print) or <i>Modify Form Components</i> on page 3 - 31 (screen entry) for more information on promoting, splitting, and changing segments and groups.</p>
6	<p>Customize the EDI Data.</p> <p>Reference See <i>Customize the EDI Data</i> on page 2 - 37 (print) or <i>Customize the EDI Data</i> on page 3 - 39 (screen entry) for more information.</p>

(Contd) Stage	Description
7	<p>Define the Layout of the Form.</p> <p>Reference See <i>Verifying EDI Delimiters</i> on page 2 - 28 (print) or <i>Verifying EDI Delimiters and Adding Frame Help Text</i> on page 3 - 29 (screen entry) for more information on customizing your EDI file, including verifying the EDI delimiters.</p>
8	<p>Compile the Form.</p> <p>Reference See <i>Compiling the Form</i> on page 2 - 95 (print) or <i>Compiling the Form</i> on page 3 - 145 (screen entry) for more information on compiling the form and translation object naming conventions.</p>
9	<p>Print the Report. Validate and review the form, and make modifications as needed.</p> <p>Reference See <i>Printing the Report</i> on page 2 - 96 (print) or <i>Printing the Report</i> on page 3 - 147 (screen entry) for more information.</p>
10	<p>Test the Translation Object. For a screen entry translation object, create a new message in Document Editor, using the screen entry translation object. For a print translation object, print a message. Verify that the output is correct.</p> <p>Reference See <i>Testing the Translation Object</i> on page 2 - 97 (print) or <i>Testing the Translation Object</i> on page 3 - 148 (screen entry) for more information.</p>

How to Launch Forms Integration

Overview This section describes how to launch the Forms Integration subsystem by means of Sterling Gentran:Server.

Procedure Use this procedure to launch the Forms Integration subsystem.

Step	Action
1	Select Programs from the Microsoft Windows Start menu.
2	Select Gentran Server Forms Integration from the Gentran Server Programs group. System Response The system displays the Forms Integration subsystem.

How to Install Sterling Gentran Standards

Overview**Note**

You need to install Sterling Gentran Standards only if you installed Integration Components during the Sterling Gentran:Server installation.

Reference

See the appropriate Sterling Gentran Standards card for information about installing the Sterling Gentran Standards.

Creating a Print Form

Contents	Overview	2 - 3
	▶ Introduction	2 - 3
	▶ Phases of Designing a Form	2 - 5
	▶ Getting Started	2 - 6
	Analyze the EDI File	2 - 7
	▶ Basic Tasks	2 - 7
	Design and Create the Form	2 - 16
	▶ Verifying the Global EDI Date Formats	2 - 16
	▶ Defining the Type of Form	2 - 17
	▶ Activating Groups, Segments, and Elements	2 - 21
	▶ Verifying EDI Delimiters	2 - 24
	Modify Form Components	2 - 27
	▶ Promoting and Changing Segments and Groups	2 - 27
	▶ Modifying the Maximum Use of the REF Segment	2 - 28
	▶ Inserting a New N4 Group	2 - 29
	▶ Modifying the Maximum Use of the PID Group	2 - 32
	▶ Promoting the DTM:2 Segment	2 - 34
	▶ Creating a CTT Group	2 - 37
	▶ Generating the Form	2 - 40
	Customize the EDI Data	2 - 42
	▶ Overview	2 - 42
	▶ Customizing the BEG Segment	2 - 44
	▶ Customizing the NTE Segment	2 - 53
	▶ Customizing the REF Segment	2 - 55
	▶ Customizing the ITD Segment	2 - 58
	▶ Customizing the N1 Group	2 - 64
	▶ Customizing the N1 Segment	2 - 66
	▶ Customizing the N3 Segment	2 - 71
	▶ Customizing the N4 Segment	2 - 73

Overview

Introduction

In this chapter This chapter includes the following topics associated with creating a print form:

- Form analysis
- Creating, saving, and setting up a new form
- Customizing the form, including the groups, segments, and elements
- Formatting the form, including fields and field labels
- Finalizing the form

Purpose of this tutorial This tutorial explains how to customize and format a form before it is compiled into a translation object. The form that you create is a **source form**. After that source form is compiled, the result is a **compiled translation object**. You must register the translation object with Sterling Gentran:Server before you can use the translation object to print messages of that type.

Form criteria Sterling Gentran:Server generates a basic form based on the following criteria you specify:

- Type of form (e.g. print or screen entry)
- Standard agency (e.g. TRADACOMS, EDIFACT)
- Standard version (e.g. ANA001, 92.1)
- Message type (e.g. ORDERS, INVOIC)
- Release (message version) (e.g. 9)

Mandatory components All mandatory groups, segments, composites, and elements for the standard, version, and message you specify are available for use (activated) when Sterling Gentran:Server creates a form. Only these mandatory form components (groups, segments, composites, and elements) are activated automatically. You must activate additional form components to accommodate the data you expect to receive from your trading partner, and then customize and format the form so that it is appropriate and useful for your company's needs.

Before you begin

Before you begin to customize a print form, you should be familiar with the following elements of form design:

- EDI standards (how EDI standards work and how the information your users need is translated to and from the standards)
- Your users (the individuals who will be using the print forms to create printouts of processed EDI data)
- Your trading partners (the organisations that send you or that you send the EDI data to be processed and printed)

You can create a different print form for each combination of message, trading partner, standard version, and release. There is no limit to the number of print forms you can create, and the number of print forms you create is not affected by the number of screen entry forms you create.

Recommendation

We recommend that you mock up a layout of the print form the way you ultimately want it to look. As you are designing the layout, you should take into consideration the people who will be using the printouts. Make sure that the form makes sense to the people who will be using it. By analyzing your company's needs before you actually create the print form, you will reduce the amount of time spent later on redesigning or reformatting the form. Specifically, you should include the following design considerations in your form planning:

- Which fields should be printed, and which are necessary for the EDI data but do not need to be displayed on the printout
- Where fields should be located on the form
- What labels you will use to identify the fields on the form

Note

Press **F1** from any area of the system to access the online Help for that function. The online Help system contains field definitions and other detailed information.

Phases of Designing a Form

Design phases

There are four phases in designing a form. These phases generally are completed in the order in which they are listed below, although the form design process is an iterative one (that is, the phases may overlap). This tutorial is designed to guide you through each of these four phases in sequential order, completing one phase before proceeding to the next. However, when you create your own forms, the phases may overlap, and usually you will return to one or more of the phases several times before the form is completed.

Phase	Description
1	Analyze the EDI file.
2	Design and create the form.
3	Modify form components.
4	Customize the EDI data.
5	Format the form.
6	Finalize the translation object.

Getting Started

Overview

This tutorial is meant to be completed in its entirety. We strongly recommend that you complete each task sequentially. The purpose of completing each task in this tutorial in sequential order, as if it were your own scenario, is not only to teach you how to perform the individual tasks, but also to teach you a logical approach and methods that should be used when you create your own form.

This section guides you in completing the steps in the first phase of form design. In this section, you will create a new print form based on a scenario we have defined for you. This section includes the basics of creating the form, such as defining the scenario and analyzing the purpose of the form, creating and saving the form, and setting up the form. You can find techniques for customizing the segments, elements, and groups in the form, as well as for formatting the organisation and appearance of the form, later in this chapter.

Print form scenario

For this tutorial, you will create a print form for the ORDERS message (purchase order), using the TRADACOMS ANA001 release 9 standard. The steps involved in creating this form are broken down into manageable pieces so that you can learn the tasks and procedures involved in creating a print form. Then, you can apply the knowledge gained from using this tutorial to create your print forms.

In this scenario, your company is MWT Manufacturing Co., which manufactures a wide variety of pet supplies for pet stores. You will create a form that formats and arranges the EDI data you receive from one of your trading partners, Pet Zone (a large pet supply retailer), to produce a printout of a purchase order. You do not want to alter the integrity of the EDI data. However, you will want to interpret some of the codes included in the EDI message into more meaningful text.

Analyze the EDI File

Basic Tasks

Introduction

To analyze the EDI file, first you must determine what data your trading partner will send you. You and your partner must agree on which standard, version, message, and release you will be using. In this tutorial, you are using a TRADACOMS ANA001 ORDERS release 9 purchase order. It is important to know the information that your partner will send you in the purchase order, and what data will be contained in each element used.

It is very helpful to review the EDI standard that you will use before analyzing the EDI file. We recommend that you obtain an EDI standard manual for the standard and version that you will use. Standard manuals are available from EDI standard agencies.

The TRADACOMS standard uses a header with each interchange (ORDHDR for the ORDERS message). The header message contains information that pertains to each message in the interchange. Sterling Gentran:Server copies the header segments to the beginning of each document, to ensure that all the relevant information is contained in the document. Therefore, you will need to load the header message (ORDHDR) into the ORDERS EDI file, so that all the segments and elements are available for use.

After discussing with your partner what they will send, determining which segments and elements your company requires, and reviewing the EDI standard, you can list the items that you will need to use. Then, you will make the form components you need available for use (activate). When Sterling Gentran:Server generates the EDI file format, the system includes all the groups, segments, composites, and elements that are defined by the standard agency for the version of the message you selected. The system activates all the groups, segments, composites, and elements that are defined as mandatory (must be present) by the standard. The system does not enable you to deactivate mandatory groups, segments, composites, and elements.

Mandatory components

For a TRADACOMS ANA001 ORDERS release 9 purchase order, the following groups, segments, composites, and elements have been defined as mandatory by the standards committee.

This table describes the components that are activated automatically when you create a new form.

Group	Segment	Composite	Element	Description
ORDHDR				Order File Header
	TYP			Transaction Type Details
			CD02	Transaction Code
	SDT			Supplier Details
		SIDN		
	CDT			Customer Details
		CIDN		
	FIL			File Details
		FLGN		File Generation Number
		FLVN		File Version Number
	FLDT		File Creation Date	
	CLO			Customer's Location
		CLOC		
	ORD			Order References
		ORNO		
OLD				
	OTR			Order Trailer
			LORD	Lines Ordered

When translating data, the system does not process groups, segments, composites, and elements that are not activated. Therefore, you must make available (activate) the form components that are not defined as mandatory by the standard, but that you have determined you need to use in the form.

Form analysis

The first step in creating a form is the analysis of the form requirements. If the analysis you perform is complete, you will have all the information you need to create the form in an efficient and logical manner. If you omit this critical step and proceed directly to creating the form, it is likely that creating the form will be a much longer and arduous task, and the form may not work the way you need it to, due to oversights and omissions.

Creating a print form for the TRADACOMS ORDERS purchase order requires several steps. Some steps are performed at the message level (such as activating form components), and others are iterative steps that are performed for each group, segment, or element in the form. In this analysis phase, you must determine what EDI data Pet Zone will be sending you, as well as what information you want to print for the purchase order. The fields on the form must accommodate all information that you want to print from the purchase order your trading partner sends you.

Required components

This table lists the form components that are required (need to be activated) and are not mandatory for the standard.

Note

When you activate a conditional group, segment, or composite, the mandatory subordinate segments, composites, and elements are activated automatically. A conditional group, segment, or composite is used only if there is EDI data available for an element in it.

Element	Description	Data Type	Length	Code Value/Format to Be Assigned
Order File Header (ORDHDR Group) (Already Activated)				
Supplier Details (SDT Segment) (Already Activated)				
SDT SIDN SID0	Supplier's ANA Location Code	String	13	
SDT SNAM	Supplier's Name	String	40	
Customer Details (CDT Segment) (Already Activated)				
CDT CIDN CID0	Customer's ANA Identity/Loc	String	13	
CDT CNAM	Customer's Name	String	40	
CDT CADD CAD0	Customer's Address Line 1	String	35	
CDT CADD CAD1	Customer's Address Line 2	String	35	
CDT CADD CAD2	Customer's Address Line 3	String	35	
CDT CADD CAD3	Customer's Address Line 4	String	35	

(Contd) Element	Description	Data Type	Length	Code Value/Format to Be Assigned
CDT CADD CAD4	Customer's Post Code	String	8	
Customer's Location (CLO Segment) (Already Activated)				
CLO CLOC CLO0	Customer's ANA Location Code	String	13	
CLO CNAM	Customer's Name	String	40	
CLO CADD CAD0	Customer's Address Line 1	String	35	
CLO CADD CAD1	Customer's Address Line 2	String	35	
CLO CADD CAD2	Customer's Address Line 3	String	35	
CLO CADD CAD3	Customer's Address Line 4	String	35	
CLO CADD CAD4	Customer's Post Code	String	8	
Order References (ORD Segment) (Already Activated)				
ORD ORNO ORN0	Customer's Order Number	String	17	
ORD ORNO ORN2	Date Order Placed by Customer	Dt/Tm	6	Screen Format = DD/MM/YY
ORD CD07	Order Code	String	1	Any valid code
Delivery Instructions (DIN Segment)				
DIN LDAT	Latest Delivery Date	Dt/Tm	6	Screen Format = DD/MM/YY
Order Line Details (OLD Group) (Already Activated)				
Order Line Details (OLD:2 Segment)				
OLD:2 SPRO SPR1	Supplier's Code for the Traded Unit	String	30	
OLD:2 CPRO CPR1	Customer's Item Code	String	30	
OLD:2 UNOR UNO0	Consumer Units in Traded Unit	String	15	Format = N0
OLD:2 UNOR CD04	Measure Indicator	String	6	

(Contd) Element	Description	Data Type	Length	Code Value/Format to Be Assigned
OLD:2 OQTY OQT0	Number of Traded Units Ordered	String	15	Format = N0
OLD:2 OUCT OUC0	Cost Price	Real	14	Screen Format = R4
OLD:2 TDES TDE0	Traded Unit Descr. Line 1	String	40	
OLD:2 TDES TDE1	Traded Unit Descr. Line 2	String	40	

Segment analysis

For each segment activated (either mandatory or optional), you must answer the following questions:

- Is the segment a group?
- Will the segment have a maximum use greater than one?
- What composites and elements need to be activated for the segment?

This table describes the segment components used in this tutorial.

Component	Description
Group	Contains related segments and/or groups that repeat in sequence until either the group data ends or the maximum number of times that the loop is allowed to repeat is exhausted.
Repeating segment	Consists of elements that repeat (in sequence) until either the data ends or the maximum number of times the segment is allowed to repeat is exhausted.
Composite	Contains two or more component data elements or subelements. Composites are defined by the EDI standards that use them (TRADACOMS, EDIFACT, and certain ANSI X12 standards).

(Contd)Component	Description
Maximum use	Refers to the number of times that a segment can be used within the structure in which the segment is defined. For example, if a segment can be used only once within a group, but the group can be used multiple times, the segment still has a maximum use of one within each occurrence of the group. The standard defines the maximum number of times a segment can be used, but you must determine which of these segments will be used, based on what your trading partner will be sending you.
Elements	Each segment contains elements. Some elements are mandatory and others are optional to the standard but necessary for your needs. You must define all the elements that you will be expecting from Pet Zone for each segment.

Customisation tasks

Sterling Gentran:Server generates a form based on the groups, segments, composites, and elements you activate. At this point, the form is compliant with the standard and it contains all the necessary components based on the data Pet Zone will send you. However, you need to customize the form components to produce a printed report that looks the way your company expects it to look.

This table lists the customisation tasks described in this tutorial.

Form Component	Description	Customisation Task
ORDHDR group	Order File Header	You will promote this group so that the fields in this group are placed on the parent frame.
TYP CD02 element	Transaction Code	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
SDT SIDN SID0 element	Supplier's ANA Location Code	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
SDT SNAM element	Supplier's Name	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
CDT CIDN CID0 element	Customer's ANA Identity/Loc	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.

(Contd) Form Component	Description	Customisation Task
CDT CNAM element	Customer's Name	You will change the field name to "Customer", which better describes the data in this field for your company.
CDT CADD CAD0 element	Customer's Address Line 1	The data in this element will be self-explanatory, so you will remove the label from this field.
CDT CADD CAD1 element	Customer's Address Line 2	The data in this element will be self-explanatory, so you will remove the label from this field.
CDT CADD CAD2 element	Customer's Address Line 3	The data in this element will be self-explanatory, so you will remove the label from this field.
CDT CADD CAD3 element	Customer's Address Line 4	The data in this element will be self-explanatory, so you will remove the label from this field.
CDT CADD CAD4 element	Customer's Post Code	The data in this element will be self-explanatory, so you will remove the label from this field.
FIL FILGN element	File Generation Number	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
FIL FILVN element	File Version Number	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
FIL FILDT element	File Creation Date	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
CLO CLOC CLO0 element	Customer's ANA Location Code	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
CLO CNAM element	Customer's Name	You will change the field name to "Location", which better describes the data in this field for your company.

(Contd) Form Component	Description	Customisation Task
CLO CADD CAD0 element	Customer's Address Line 1	The data in this element will be self-explanatory, so you will remove the label from this field.
CLO CADD CAD1 element	Customer's Address Line 2	The data in this element will be self-explanatory, so you will remove the label from this field.
CLO CADD CAD2 element	Customer's Address Line 3	The data in this element will be self-explanatory, so you will remove the label from this field.
CLO CADD CAD3 element	Customer's Address Line 4	The data in this element will be self-explanatory, so you will remove the label from this field.
CLO CADD CAD4 element	Customer's Post Code	The data in this element will be self-explanatory, so you will remove the label from this field.
ORD ORNO ORN0 element	Customer's Order Number	You will set up the document name (which enables you to differentiate between messages in the document browsers in Sterling Gentran:Server) in this element. Also, you will change the field name to "Order Number", which better describes the data in this field for your company.
ORD ORNO ORN2 element	Date Order Placed by Customer	You will change the field name to "Order Date", which better describes the data in this field for your company. Also, the date in the EDI data will be in the format "YYMMDD", but you want the date to be printed in the format "DD/MM/YY", so you will set the screen format accordingly. In addition, you will change the field and element lengths to reflect the longer date format.
ORD CD07 element	Order Code	The code from this element will be used to look up the description in a code values list, and the description will be printed in another field that you create. You will prevent the Order Code field from being displayed on the printout, because the more meaningful description will be printed instead.

(Contd) Form Component	Description	Customisation Task
DIN LDAT element	Latest Delivery Date	The date in the EDI data will be in the format “YYMMDD”, but you want the date to be printed in the format “DD/MM/YY”, so you will set the screen format accordingly. Also, you will change the field and element lengths to reflect the longer date format.
OLD group	Order Line Details	After you customize and format the fields in the OLD group, you will copy and paste the OLD group at the same level in the EDI file. The original OLD group will contain column headings for the line item detail, but you will prevent the column headings from being printed for all line items after the first. You will change the maximum use of the first OLD group to one so that the column headings are printed only once (for the first line item). You will change the maximum use of the second OLD group to 999,998. Up to 999,999 line items (one from the first OLD group and 999,998 from the second OLD group) can be printed on the printout (without printing the column headings for each line item).
OLD:2 SEQA element	First Level Sequence Number	The standard allows a maximum length of ten digits, but you expect a number no longer than five digits from your partner. You will change the maximum length of the element and the display length of the field to five. You will change the field name to “Line”, which better describes the data in this field for your company.
OLD:2 SPRO SPR1 element	Supplier’s Code for the Traded Unit	The standard allows a maximum length of thirty characters, but you expect a string no longer than ten characters from your partner. You will change the maximum length of the element and the display length of the field to ten. You will change the field name to “Prod ID”, which better describes the data in this field for your company.

(Contd) Form Component	Description	Customisation Task
OLD:2 CPRO CPR1 element	Customer's Item Code	This element is required in the purchase order, but is not meaningful for your purposes. Therefore, you will prevent this field from being printed on the printout.
OLD:2 UNOR UNO0 element	Consumer Units in Traded Unit	The standard allows a maximum length of fifteen characters, but you expect a number no longer than ten digits from your partner. You will change the maximum length of the element and the display length of the field to ten. Also, you will change the data type from string to number, and assign EDI and screen formats of N0 (indicating a number with an implicit decimal point and no decimal places). In addition, you will change the field name to "Cons. Units", which better describes the data in this field for your company.
OLD:2 UNOR CD04 element	Measure Indicator	You will change the field name to "Unit", which better describes the data in this field for your company.
OLD:2 OQTY OQT0 element	Number of Traded Units Ordered	The standard allows a maximum length of fifteen characters, but you expect a number no longer than six digits from your partner. You will change the maximum length of the element and the display length of the field to six. Also, you will change the data type from string to number, and assign EDI and screen formats of N0 (indicating a number with an implicit decimal point and no decimal places). In addition, you will change the field name to "Qty Ord", which better describes the data in this field for your company.

(Contd) Form Component	Description	Customisation Task
OLD:2 OUCT OUC0 element	Cost Price	The standard allows a maximum length of fourteen digits, but you expect a number no longer than ten digits from your partner. You will change the maximum length of the element and the display length of the field to ten. Also, you will change the screen format of the data to R4 (indicating a number with an explicit decimal point and four decimal places). In addition, you will change the field name to “Price Each”, which better describes the data in this field for your company.
OLD:2 TDES TDE0 element	Traded Unit Descr. Line 1	The data in this element will be self-explanatory, so you will remove the label from this field.
OLD:2 TDES TDE1 element	Traded Unit Descr. Line 2	The data in this element will be self-explanatory, so you will remove the label from this field.
OTR segment	Order Trailer	You want this segment to print the total number of line items at the end of the printout. However, if the form were generated now, the total would be printed at the beginning of the printout (because the fields in the OTR segment would be displayed on the same frame as the fields in the ORDHDR group). You will change the arrangement of the form, while maintaining the integrity of the EDI data, so the total is printed at the end of the purchase order.
OTR LORD element	Lines Ordered	You will change the field name to “Number of Line Items”, which better describes the data in this field for your company.

Design and Create the Form

Verifying the Global EDI Date Formats

Introduction Sterling Gentran:Server enables you to customize the global EDI date formats (for all forms). You can specify the default EDI format of dates for both six-character dates and eight-character dates. When you customize the global EDI date formats, the settings are valid for all forms created in the current session of Sterling Gentran:Server. However, you can override the default date formats for an individual element on the Element Properties dialog for that element.

You must verify that you are using the correct global date formats the first time you use Sterling Gentran:Server. Typically, you will verify the global EDI date formats one time only. You can change the default date formats if they do not match the formats you intend to use.

Procedure Use this procedure to verify the global EDI date formats.

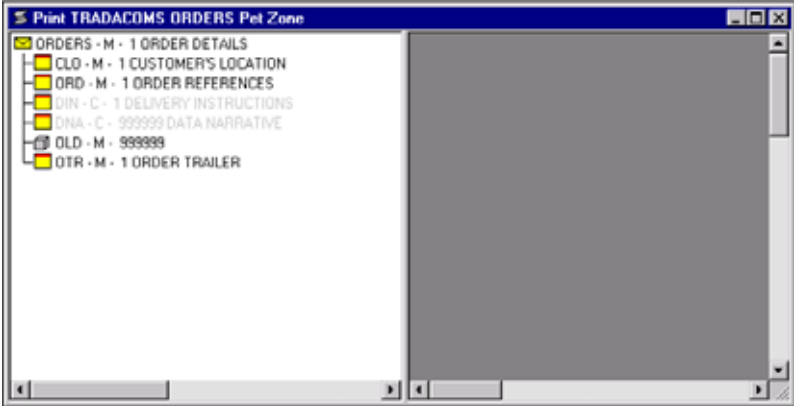
Step	Action
1	Select Preferences from the Options menu to display the Preferences dialog. The Preferences dialog is a property sheet that enables you to set global defaults for Sterling Gentran:Server.
2	Verify that the Standard Formats tab displays the default date formats that are used when elements are read from the standards database.
3	Verify that the Six-character dates drop-down list box contains YYMMDD to define the format of the six-character EDI dates in your forms.
4	Verify that the Eight character dates drop-down list box contains YYYYMMDD to define the format of the eight-character EDI dates in your forms.
5	Click OK to accept the default date formats for 6- and 8-character date fields and exit the Preferences dialog. Note To change the order in which the date formats appear in the Six-character dates and Eight character dates drop-down list boxes or to add a new date format to the lists, select Date Formats from the Options menu.

Defining the Type of Form

Overview The first task in creating a new form is to define the type of form and EDI standard, version, transaction (message), and release. In this tutorial, you are creating a print form so that you can print the purchase orders that your partner sends you. Instead of defining the ORDERS message to the system yourself, you want Sterling Gentran:Server to use the standards database on your system to build the purchase order according to the TRADACOMS standard.

Procedure Use this procedure to create the new print form.

Step	Action
1	Select New from the File menu to display the New Form Wizard.
2	From the What kind of form list, select Print to indicate that the translation object you are creating is a print translation object.
3	In the What is the name of the form box, enter Print TRADACOMS ORDERS Pet Zone . This description provides a brief explanation of the compiled translation object that enables you to differentiate it from similar translation objects in Sterling Gentran:Server. Example Print TRADACOMS ORDERS Pet Zone is the description of a TRADACOMS ANA001 purchase order (ORDERS) for partner Pet Zone.
4	Verify that the name that appears in the What is your name box is accurate.
5	Click N ext to advance the wizard.
6	Select Delimited EDI as the data format syntax that you want to use.
7	Click C ustomize. System Response The system displays the New Delimited EDI Wizard.
8	Click N ext to continue.
9	From the Data Source list, select Gentran Standards ODBC data source.
10	Click N ext to continue.
11	From the Agency list in the Standards section, select [A] Tradacoms , which is the EDI standard you will use for this translation object.

(Contd) Step	Action
12	From the Version list, select [ORDERS] ORDER DETAILS , which is the version of the standard you use for this translation object. The versions that are available depend on which standard you selected.
13	From the Transaction list, select [850] PURCHASE ORDER , which is the transaction set (document) you use for this translation object. The documents that are available depend on which standard and version you selected.
14	From the Release drop-down list, select 9 , which is the message version you will use for this translation object. The message versions that are available depend on which message (transaction) you selected.
15	Click N ext to continue.
16	Click F inish. This may take a few seconds. System Response The system displays the New Form Wizard dialog box.
17	Click N ext to continue.
18	Click F inish to create the EDI file (it may take a few seconds to create the file). System Response The form is displayed as follows: 
19	From the Edit menu, select D etails. System Response The Translation Object Details box is displayed.
20	Verify that P rint is selected from the Translation Object Function list.
21	In the Major version box, enter 1 to designate the version number for this translation object.

(Contd) Step	Action
22	<p>In the Minor version box, accept the default value 0 that designates the release number for this translation object.</p> <p>Hint When you make a major change to this form, increase the version to the next higher sequential number (e.g., 2.0, 3.0). If you make a minor change to the form, increase the release to the next higher sequential number (e.g., 2.1, 2.2).</p>
23	<p>The Input and Output boxes (Agency, Version, Transaction, Release, and F Group) contain information only if the Input and/or Output sides of the form are of EDI format. For this tutorial, do not change the information in these boxes.</p> <p>Note The system allows you to change the information in the Input and Output boxes, but modifying this information does not alter the content of the form. An example of when you might want to alter these boxes is when you want the form to reflect a standard version that is not loaded on your system. You can change the version on this dialog, and then physically alter the form to be compliant with that version.</p>
24	<p>Click OK to save the translation object details.</p>
25	<p>Select Save from the File menu.</p> <p>Recommendation We recommend that you save the form as often as possible, to mitigate the possible loss of additions or modifications in the event of a hardware or system error.</p> <p>Note If you have performed any function that invalidates the current format of the translation object, the Save function is unavailable until you regenerate the layout (click Generate Layout on the Main Toolbar).</p>
26	<p>Verify that the Save in list reflects the drive\folder where Sterling Gentran:Server is installed.</p> <p>Default The default drive\folder is GENSRVNT\Forms.</p>

(Contd) Step	Action
27	<p>In the File name box, enter pettordp.stp to replace the default file name. You allocate a file name to a form when you save the form for the first time or use the Save As function to save a copy of the form under a different name. The name of the form must be one to eight unique characters that define the form in a meaningful way. For example, “PET_850P” is the name of a print form for an ANSI X12 purchase order message (850) for partner Pet Zone.</p> <p>Note The default file extension for forms is .STP. Using this extension distinguishes source form files from other types of files, such as compiled translation objects. The naming conventions in Sterling Gentran:Server are as follows:</p> <ul style="list-style-type: none"> ▶ The source form (form created in Sterling Gentran:Server) should be named using the file extension .STP (e.g., PET_850P.STP). ▶ The compiled translation object (translation object that is the result of compiling the source form) should be named using the same file name that was allocated to the source form, but with the file extension .TPL (e.g., PET_850P.TPL). <p>Recommendation We recommend that you use these naming conventions to distinguish source forms and compiled translation objects from other types of files. Use the same file name (different file extension) for a source form and the translation object that was compiled from it.</p>
28	Click Save to save the form.

Loading the ORDHDR Message

Overview The TRADACOMS standard uses a header with each interchange (ORDHDR for the ORDERS message). The header message contains information that pertains to each message in the interchange. Sterling Gentran:Server copies the header segments to the beginning of each document, to ensure that all the relevant information is contained in the document. Therefore, you need to load the header message (ORDHDR) into the ORDERS EDI file, so that all the segments and elements are available for use.

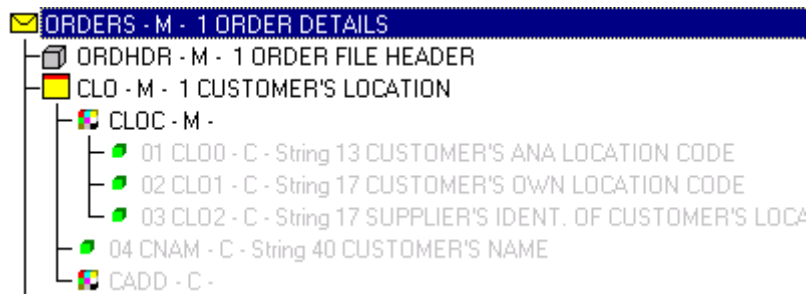
Procedure Use this procedure to load the ORDHDR message into the ORDERS EDI file.

Step	Action
1	Click the ORDERS EDI file icon to select it.
2	Select Create Sub from the Edit menu.
3	Select Transaction Set from the Create Sub cascading menu. You will be prompted to select an ODBC data source name. Select the appropriate DSN and click OK to display the Insert Transaction Set From Standards dialog.
4	From the Agency drop-down list box, select [A] Tradacoms , which is the EDI standard you will use for the inserted message.
5	From the Version drop-down list box, select [ANA001] , which is the version of the standard you will use for the inserted message. The versions that are available depend on which standard you selected.
6	From the Transaction drop-down list box, select [ORDHDR] ORDER FILE HEADER , which is the transaction set (message) you will use for the inserted message. The transactions that are available depend on which standard and version you selected.
7	From the Release drop-down list box, select 9 , which is the message version you will use for the inserted message. The message versions that are available depend on which message (transaction) you selected.
8	Click OK to load the ORDHDR message into the ORDERS EDI file as a subordinate group.

Activating Groups, Segments, Composites, and Elements

Overview When Sterling Gentran:Server generates the form, the system includes all the groups, segments, composites, and elements that are defined by the standard agency (TRADACOMS) for the version (ANA001), message (ORDERS), and release (9) you selected. The system activates all the groups, segments, composites, and elements that are defined as mandatory (must be present) by the standard. The system does not enable you to deactivate the mandatory groups, segments, composites, and elements.

Example In the example below, the CLO segment and CLO CLOC composite are mandatory for the purchase order. You do not need to activate these components. The CLO CLOC CLO0, CLO CLOC CLO1, CLO CLOC CLO2, and CLO CNAM elements and the CLO CADD composite are not mandatory, so they are dimmed on the form. To view the segments, composites, and elements in a group, segment, or composite on your form, double-click the form component in the EDI File Format Window (left side of the Forms main window). To activate an inactive form component, click **Activate** on the Main Toolbar, then click the form component. The component is no longer dimmed.



You must activate the groups, segments, composites, and elements that are not defined as mandatory by the standard, but that you have determined that you need to use in the form.

Groups, segments, elements, and composites used in this tutorial

This table lists the groups, segments, elements, and composites used in this tutorial.

Group	Segment	Composite	Element	
ORDHDR (already activated)	SDT (already activated)	SIDN (already activated)	SID0	
			SNAM	
	CDT (already activated)	CIDN (already activated)		CID0
				CNAM
		CADD		CAD0
				CAD1
				CAD2
				CAD3
		CAD4		
		CLO (already activated)	CLOC (already activated)	CLO0
CNAM				
CADD			CAD0	
			CAD1	
			CAD2	
			CAD3	
			CAD4	
ORD (already activated)		ORNO (already activated)	ORN0	
			ORN2	
			CD07	
DIN			LDAT	

(Contd) Group	Segment	Composite	Element
OLD (already activated)	OLD:2	SPRO (mandatory for OLD:2)	SPR1
		CPRO	CPR1
		UNOR (mandatory for OLD:2)	UNO0
			CD04
		OQTY (mandatory for OLD:2)	OQT0
		OUCT	OUC0
		TDES	TDE0
TDE1			

Procedure Use this procedure to activate the required groups, segments, composites, and elements.

Step	Action
1	<p>Double-click the groups, segments, and composites listed in the previous table to open them. The table lists all the groups, segments, composites, and elements that you need to activate. Opening all the necessary groups, segments, and composites before you start to activate enables you to scroll down the form and activate the segments, composites, and elements sequentially.</p> <p>Note When you activate a conditional group, segment, or composite, the mandatory subordinate segments, composites, and elements are activated automatically.</p>
2	Click Activate on the Main Toolbar.
3	<p>Click each inactive segment that you need to use. Clicking these segments will activate the segments.</p> <p>Note If you accidentally click a segment that you did not mean to activate, right click the segment and select Deactivate from the shortcut menu.</p>

(Contd) Step	Action
4	<p>Click each inactive composite that you need to use. Clicking these composites will activate the composites.</p> <p>Note If you accidentally click a composite that you did not mean to activate, click the composite with the right mouse button to access the shortcut menu. Select Deactivate from the shortcut menu.</p>
5	<p>Click each inactive element that you need to use. Clicking these elements will activate the elements. When you activate an element in a print form, the tag “Printed” is displayed before that element’s description to indicate that this field will be printed. If you later prevent a field from being displayed on the printout, then the tag “Not Printed” is displayed before that element’s description.</p> <p>Note If you accidentally click an element that you did not mean to activate, click the element with the right mouse button to access the shortcut menu. Select Deactivate from the shortcut menu.</p>
6	Click Activate on the Main Toolbar to turn activation mode off.

Verifying EDI Delimiters

Overview

You are using an EDI standard that contains composite elements, so you must verify that Sterling Gentran:Server is specifying the correct delimiters. Delimiters are flags that you define to the system as separating specific EDI components. Delimiters are necessary for all variable field-length standards, because the data is compressed (and the leading zeroes and trailing blanks are removed). The fields vary in length, so the system needs a flag to determine where one element ends and another begins. For example, an element delimiter marks the beginning of a new element.

Recommendation

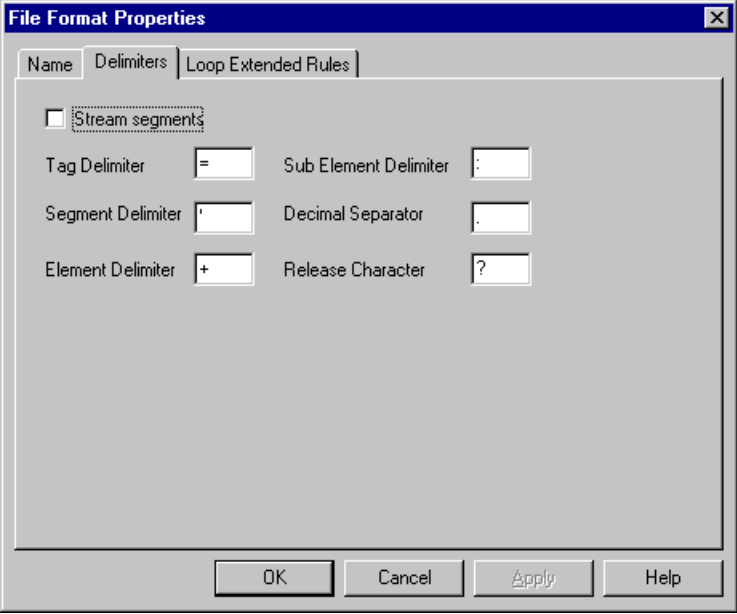
Although verifying EDI delimiters in Sterling Gentran:Server is mandatory only if you are using a standard with composite elements or subelements, we recommend that you perform this task regardless of which standard you use.

EDI delimiters table

This table lists the valid EDI delimiters.

Field	EDIFACT Default Character	EDIFACT Default Hex Value
Tag Delimiter	= (equal sign)	Ox3D
Segment Delimiter	' (apostrophe)	Ox27
Element Delimiter	+ (plus sign)	Ox2B
Sub Element Delimiter	: (colon)	Ox3A
Decimal Separator	. (full stop)	Ox2E
Release Character	? (question mark)	Ox3F

Procedure Use this procedure to verify EDI delimiters.

Step	Action
1	Click the Orders file icon with the right mouse button to access the shortcut menu.
2	Select Properties from the shortcut menu to display the File Format Properties dialog.
3	<p>Click Delimiters to access the Delimiters dialog.</p> 
4	<p>Verify that the correct delimiters are being used for the TRADACOMS standard. If the delimiters differ from the default values listed in the table below, you can enter either the character or the hexadecimal value in the correct field. The default delimiters for TRADACOMS are the following:</p> <p>Note If you use the default hex value, the value <i>must</i> begin with “0x” (the number zero and the letter “x”).</p> <p>Note The Stream segments check box on the Delimiters dialog currently is not marked. For this tutorial, do not mark this check box, so the translator will continue to insert a carriage return after every segment. If the Stream segments check box is marked, then a carriage return is <i>not</i> used after every segment, and the segments are “streamed”.</p>
5	Click OK to save the delimiters and exit the Delimiters dialog.
6	Click Close to exit the File Format Properties dialog.

Modify Form Components

Promoting the ORDHDR Group to the Parent Frame

Introduction The Promote function extracts one iteration (instance) of a group or repeating segment. Promote is a specialized function that preserves the integrity of the EDI structure.

By default, the fields corresponding to each group and repeating segment are displayed on a separate frame from the rest of the fields in the message. When you promote a group to the parent frame, the fields corresponding to the group are displayed on the frame to which the group is subordinate. If you do not promote a group to the parent frame, the fields corresponding to the group are displayed on their own frame.

Procedure Use this procedure to promote the ORDHDR group to the parent frame.

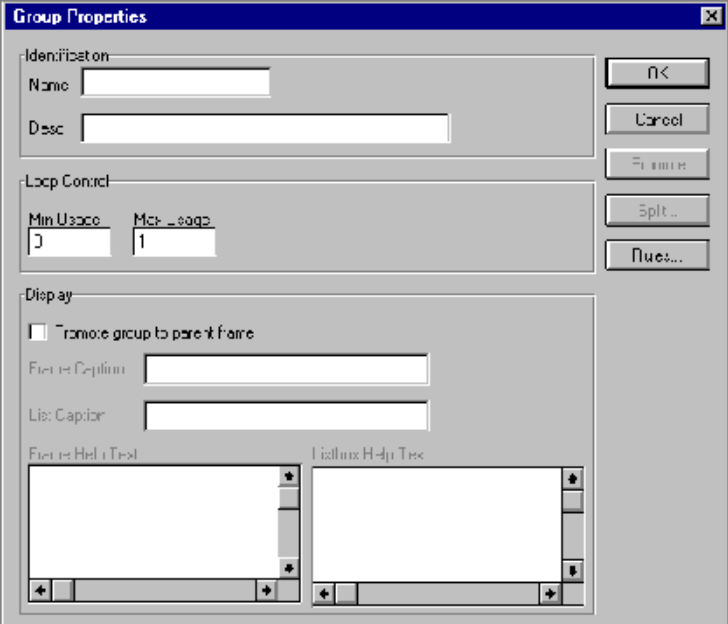
Step	Action
1	Click the ORDHDR group with the right mouse button and select Properties from the shortcut menu. System Response The Group Properties dialog is displayed.
2	Select the Print tab.
3	Click the Promote group to parent frame check box to display the fields in this group on the same frame as the fields in the parent group. Note Although this group has a maximum use of one, if you do not mark the Promote group to parent frame check box, then the fields in this group will <i>not</i> be displayed on the same frame in the Layout Window as the fields in the parent group.
4	Click OK to exit the Group Properties dialog.

Creating an OTR Group

Overview The OTR segment contains Order Trailer summary information for the purchase order. If the form were generated now (displaying the layout of the fields in the form on the right side of the Forms main window), the total number of line items would be printed along with the ORDHDR fields at the beginning of the purchase order (because the fields in the OTR segment would be displayed on the same frame as the fields in the ORDHDR group).

To print the total number of line items at the end of the printout *and* maintain the integrity of the purchase order, you must create an OTR *group* with a minimum use and a maximum use of one, then cut the OTR segment and paste it as a subordinate to the group you just created. By moving the OTR segment to the new OTR group that you create, the total number of line items will be displayed on its own frame, separate from the header (ORDHDR) information.

Procedure Use this procedure to create an OTR group.

Step	Action
1	Select the OTR segment.
2	Select Insert from the Edit menu.
3	<p>Select Group from the cascading menu.</p> <p>System Response The Group Properties dialog is displayed.</p> 

(Contd) Step	Action
4	<p>In the Name field, enter OTR_Group as the segment loop identification code.</p> <p>Caution Do not use spaces or hyphens (-) in the Name field. You can use the underscore (_) to separate words</p>
5	<p>In the Desc field, enter OTR Group to provide a brief explanation of the loop.</p>
6	<p>Select the Looping tab.</p>
7	<p>In the Min Usage field, enter 1 to make this group mandatory. Changing the minimum use of a segment or group from zero to one changes the status of the segment or group from conditional to mandatory. If EDI data is not present for a segment or group that has a minimum use of one or greater, a compliance error will occur during translation for that segment or group.</p>
8	<p>Click OK to create the group. Sterling Gentran:Server prompts you that the frame caption for the group will default to the name of the group. (The frame caption is the name of the frame for the group. When the frame caption is not specified, then Sterling Gentran:Server uses the value in the Name field as the frame caption.)</p>
9	<p>Click OK to accept the message.</p>

How to cut and paste the OTR segment

Use this procedure to cut and paste the OTR segment.

Step	Action
1	Verify that the OTR segment is selected.
2	Click Cut on the Main Toolbar.
3	Select the OTR group, which is the group for which you want to paste the OTR segment as a subordinate.
4	Click Paste on the Main Toolbar to paste the OTR segment. Sterling Gentran:Server prompts you to specify whether you want the contents of the Clipboard pasted as a child (subordinate) of the selected group, or at the same level as the group.
5	The Paste as a child of selected item radio button is selected as the default. Accept the default to paste the Clipboard contents as a child (subordinate) of the group. Click OK to exit the dialog.

Generating the Form

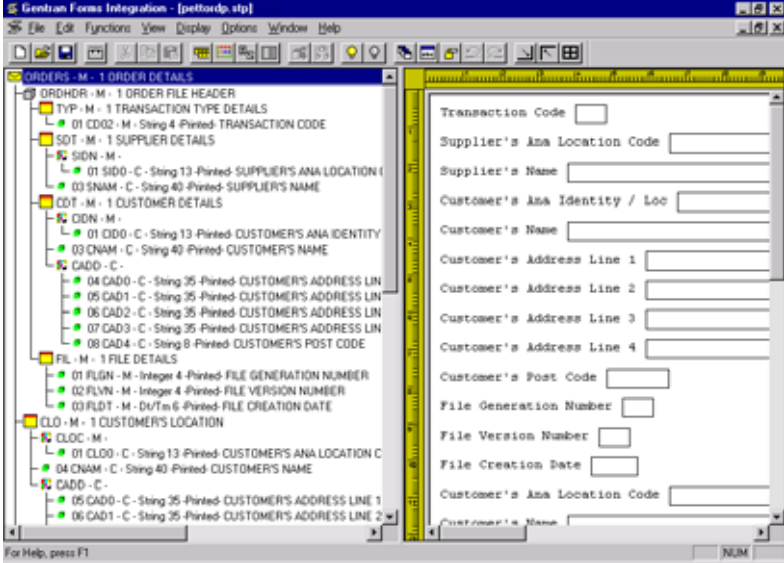
Overview Generating a form is different from compiling a form. When you *compile* a form, the source form is translated into a compiled translation object. When you *generate* a form, the fields of the form are displayed on a frame in the Layout Window (right side of the Forms main window), based on the groups, segments, and elements that are activated.

Note

You can, and should, regenerate (or refresh) the form several times as you customize and format the form to ensure that you are viewing the most recent changes to the Layout Window.

Procedure Use this procedure to generate the print form based on the groups, segments, and elements you activated.

Step	Action
1	Select the ORDERS file icon. Selecting the ORDERS file icon before you generate the layout enables you to view the beginning of the purchase order layout in the Layout Window after the layout is generated. However, selecting the ORDERS file icon is not a required prerequisite to generating the layout.

(Contd) Step	Action
2	<p>Click Generate Layout on the Main Toolbar.</p> <p>System Response The layout of the print form will be displayed in the Layout Window.</p>  <p>Note You should regenerate the form periodically as you customize the print form to ensure that the most recent changes to the frame are reflected in the Layout Window.</p> <p>When you generate the form, there is one field on the right side of your screen (Layout Window) for every activated element on the left side of your screen (EDI File Format Window). You can click either the field or its corresponding element to select it. To access the Element Properties dialog for a field/element, either double-click the element, or use the right mouse button to click the field or element, then select Properties from the shortcut menu.</p> <p>Note When you first generate the form, each field in the Layout Window is labelled with the same name as its corresponding element in the EDI File Format Window. As you customize the form, however, you will change some of the labels and remove others, so all the fields will not be labelled the same as their corresponding elements. Even though you will change or remove some field labels, each field still will correspond to one element.</p>

**After generating
the form**

After the print form is generated, each group and repeating segment has a corresponding frame in the Layout Window that contains all the groups, segments, and elements at that level. Fields in groups or segments that have a maximum use of only one are displayed on the frame corresponding to the group to which the groups or segments are subordinate. For example, the following fields are displayed on one frame (all the groups and segments in which these fields are contained are subordinate to the same group):

- Transaction Code (TYP CD02)
- Supplier's ANA Location Code (SDT SIDN SID0)
- Supplier's Name (SIDN SNAM)
- Customer's ANA Identity/Loc (CDT CIDN CID0)

Note

There are several other fields on this frame. All of the fields on this frame are subordinate to the same group.

In print forms, the frames are not titled in the Layout Window (as they are in screen entry forms). To identify the frame that currently is displayed, click one of the fields on the frame, then check the EDI File Format Window to determine in which segment or group the field is contained.

Customize the EDI Data

Overview

Introduction You can customize the form, including the properties of each type of form component (group, segment, and element).

Customizing the form is an iterative process. This tutorial guides you through all the steps involved in customizing the form, component by component. When you create print forms, you usually will activate the form components you need to use, then compile the form, test it, and print the EDI data using the compiled translation object. As you substantially customize the form, you usually will compile and print the form several times to view your changes before the form truly is finalized.

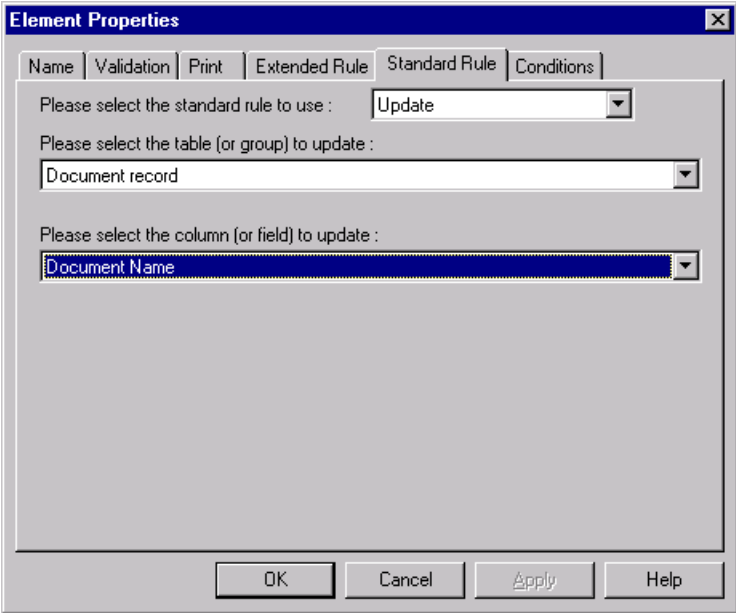
This section explains how to customize the form components for each sequential component.

How to set up the document name

We recommend that you set up a Document Name for each form. The document name makes the identification of a message created by the form easier in Sterling Gentran:Server. Setting up the document name enables you to differentiate between messages in the document browsers in Sterling Gentran:Server. If you set up the document name in the Forms Integration subsystem, the Name field of the document browsers that contain this message in Sterling Gentran:Server will contain the data from that element. You can choose any element as the document name, but we strongly recommend that you select an element that occurs only once in the message and has a data type of string. For a TRADACOMS ANA001 ORDERS release 9 purchase order, the document name usually is the Customer's Order Number.

Use this procedure to set up the document name.

Step	Action
1	Double-click the ORD ORNO ORN0 element. System Response The Element Properties dialog is displayed. Note In this tutorial, we recommend that you select this element because it is a non-recurring and mandatory element, and it will help identify this message meaningfully in Sterling Gentran:Server.
2	Select the Use Standard Rule tab.
3	Select the Update option.

(Contd) Step	Action
4	From the Table/Group drop-down list box, select Document record to indicate that you are updating the document record in Sterling Gentran:Server.
5	<p>From the Column/Field drop-down list box, select Document Name to indicate that you are updating the Name field in the document browsers with the contents of the ORD ORNO ORNO element.</p> <p>The dialog now should look like this:</p>  <p>The screenshot shows a dialog box titled 'Element Properties' with a close button (X) in the top right corner. It has several tabs: 'Name', 'Validation', 'Print', 'Extended Rule', 'Standard Rule', and 'Conditions'. The 'Standard Rule' tab is selected. Below the tabs, there are three dropdown menus. The first is labeled 'Please select the standard rule to use:' and has 'Update' selected. The second is labeled 'Please select the table (or group) to update:' and has 'Document record' selected. The third is labeled 'Please select the column (or field) to update:' and has 'Document Name' selected. At the bottom of the dialog, there are four buttons: 'OK', 'Cancel', 'Apply', and 'Help'.</p>
6	Click OK to set up the document name.

Customizing the ORDHDR Group

Overview The ORDHDR group (Order File Header) is used to print the header details pertaining to the ORDERS message. You already promoted this group to the parent frame (the ORDERS file).

Customizing the TYP Segment

Overview The TYP segment (Transaction Type Details) contains the transaction code for this message.

How to customize the TYP CD02 element The TYP CD02 element (Transaction Code) is a mandatory element that contains the code for the type of orders that follow (e.g. new orders, cancelled orders, etc.). You do not need to print the code on the printout, so you will prevent (hide) the Transaction Code field from being printed.

Use this procedure to prevent the Transaction Code field from being printed.

Step	Action
1	Double-click the TYP CD02 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the dialog.

Customizing the SDT Segment

Overview The SDT segment (Supplier Details) contains details about the supplier. In this tutorial, the supplier is your company, MWT Manufacturing Co.

How to customize the SDT SIDN SID0 element The SDT SIDN SID0 element (Supplier's ANA Location Code) contains the code assigned by the Article Numbering Association for the supplier's location. Your trading partner will send you this code, but you do not need the code to be printed on the printout. Therefore, you will hide this field.

Use this procedure to hide the Supplier's ANA Location Code field.

Step	Action
1	Double-click the SDT SIDN SID0 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the dialog.

How to customize the SDT SNAM element The SDT SNAM element (Supplier's Name) contains the name of the supplier (in this tutorial, you are the supplier). Your trading partner will send you this name, but you do not need the name to be printed on the printout. (*All* purchase orders you receive from customers should have your company designated as the supplier.) Therefore, you will hide this field.

Use this procedure to hide the Supplier's Name field.

Step	Action
1	Double-click the SDT SNAM element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the dialog.

Customizing the CDT Segment

Overview The CDT segment (Customer Details) contains details about the customer (your trading partner, Pet Zone). In this tutorial, the CDT segment contains details relating to the Pet Zone corporate office.

How to customize the CDT CIDN CID0 element The CDT CIDN CID0 element (Customer's ANA Identity/Loc) contains the code assigned by the Article Numbering Association for the customer's location. Your trading partner will send you this code, but you do not need the code to be printed on the printout. Therefore, you will hide this field.

Use this procedure to hide the Customer's ANA Identity/Loc field.

Step	Action
1	Double-click the CDT CIDN CID0 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the dialog.

How to customize the CDT CNAM element The CDT CNAM element contains the Customer's Name. For brevity, you will change the field label to Customer.

Use this procedure to change the field label for the Customer's Name field.

Step	Action
1	Double-click the CDT CNAM element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, enter Customer: to replace the existing field label.
4	Click OK to exit the dialog.

How to customize the CDT CADD CAD0 element

The CDT CADD CAD0 element (Customer's Address Line 1) contains the first line of the customer's address. The address will correspond to the name in the CDT CNAM element, so you do not need to print a label for the address fields.

Use this procedure to remove the field label for the Customer's Address Line 1 field.

Step	Action
1	Double-click the CDT CADD CAD0 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

How to customize the CDT CADD CAD1 element

The CDT CADD CAD1 element (Customer's Address Line 2) contains the second line of the customer's address. The address will correspond to the name in the CDT CNAM element, so you do not need to print a label for the address fields.

Use this procedure to remove the field label for the Customer's Address Line 2 field.

Step	Action
1	Double-click the CDT CADD CAD1 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

How to customize the CDT CADD CAD2 element

The CDT CADD CAD2 element (Customer's Address Line 3) contains the third line of the customer's address. The address will correspond to the name in the CDT CNAM element, so you do not need to print a label for the address fields.

Use this procedure to remove the field label for the Customer's Address Line 3 field.

Step	Action
1	Double-click the CDT CADD CAD2 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

How to customize the CDT CADD CAD3 element

The CDT CADD CAD3 element (Customer's Address Line 4) contains the fourth line of the customer's address. The address will correspond to the name in the CDT CNAM element, so you do not need to print a label for the address fields.

Use this procedure to remove the field label for the Customer's Address Line 4 field.

Step	Action
1	Double-click the CDT CADD CAD3 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

**How to customize
the CDT CADD
CAD4 element**

The CDT CADD CAD4 element (Customer's Post Code) contains the post code of the customer's address. The post code will correspond to the name in the CDT CNAM element, so you do not need to print a label for this field.

Use this procedure to remove the field label for the Customer's Post Code field.

Step	Action
1	Double-click the CDT CADD CAD4 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

Customizing the FIL Segment

Overview The FIL segment (File Details) contains details about the ORDHDR message. These elements must be present in the ORDHDR message, but you do not need to print them on a printout.

How to customize the FIL FLGN element The FIL FLGN element (File Generation Number) contains the sequential number assigned to this message by your trading partner. Your trading partner will send you this number, but you do not need the number to be printed on the printout. Therefore, you will hide this field.

Use this procedure to hide the File Generation Number field.

Step	Action
1	Double-click the FIL FLGN element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the dialog.

How to customize the FIL FLVN element The FIL FLVN element (File Version Number) contains the number corresponding to this version of the message. The first version of the message is always version one, and subsequent copies of the message are incremented by one. Your trading partner will send you this number, but you do not need the number to be printed on the printout. Therefore, you will hide this field.

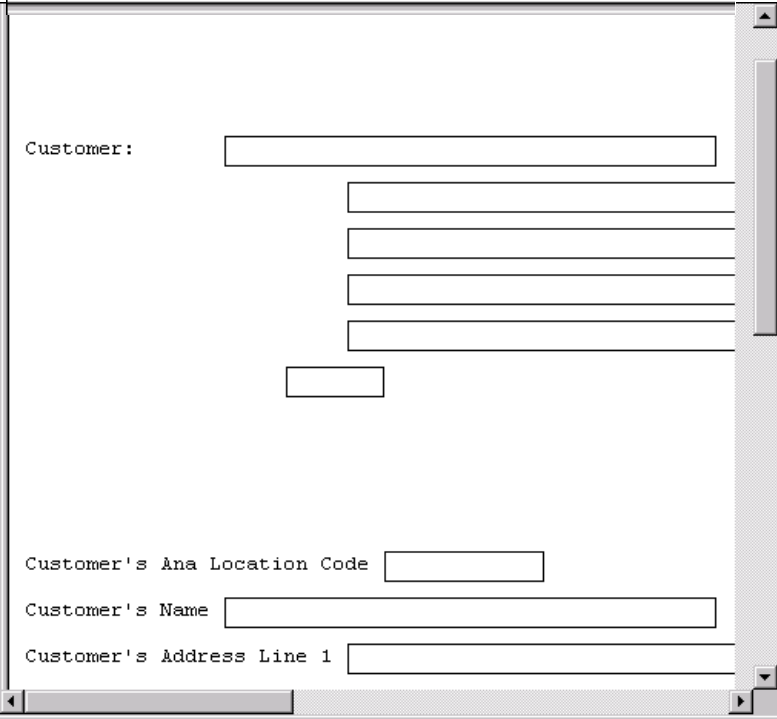
Use this procedure to hide the File Version Number field.

Step	Action
1	Double-click the FIL FLVN element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the dialog.

How to customize the FIL FLDT element

The FIL FLDT element (File Creation Date) contains the date on which the message was created. Your trading partner will send you this date, but you do not need the date to be printed on the printout. Therefore, you will hide this field.

Use this procedure to hide the File Creation Date field.

Step	Action
1	Double-click the FIL FLDT element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the dialog.
5	Click Generate Layout on the Main Toolbar to refresh the display of the print form. The print form now should look like this:  <p>The screenshot shows a print form with the following fields:</p> <ul style="list-style-type: none"> Customer: [text box] [text box] [text box] [text box] [text box] [text box] Customer's Ana Location Code [text box] Customer's Name [text box] Customer's Address Line 1 [text box]

Customizing the CLO Segment

Overview

The CLO segment (Customer's Location) contains details about the specific customer location pertaining to this purchase order. In this tutorial, the CLO segment contains details relating to the specific Pet Zone store to which the order should be sent. Earlier in this tutorial, you customized the CDT segment, which contains details relating to the Pet Zone corporate office.

How to customize the CLO CLOC CLO0 element

The CLO CLOC CLO0 element (Customer's ANA Location Code) contains the code assigned by the Article Numbering Association for the customer's location. Your trading partner will send you this code, but you do not need the code to be printed on the printout. Therefore, you will hide this field.

Use this procedure to hide the Customer's ANA Location Code field.

Step	Action
1	Double-click the CLO CLOC CLO0 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the dialog.

How to customize the CLO CNAM element

The CLO CNAM element contains the Customer's Name (for the specific location to which the order should be sent). For brevity, you will change the field label to Location.

Use this procedure to change the field label for the Customer's Name field.

Step	Action
1	Double-click the CLO CNAM element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, enter Location: to replace the existing field label.
4	Click OK to exit the dialog.

How to customize the CLO CADD CAD0 element

The CLO CADD CAD0 element (Customer's Address Line 1) contains the first line of the customer's address. The address will correspond to the name in the CLO CNAM element, so you do not need to print a label for the address fields.

Use this procedure to remove the field label for the Customer's Address Line 1 field.

Step	Action
1	Double-click the CLO CADD CAD0 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

How to customize the CLO CADD CAD1 element

The CLO CADD CAD1 element (Customer's Address Line 2) contains the second line of the customer's address. The address will correspond to the name in the CLO CNAM element, so you do not need to print a label for the address fields.

Use this procedure to remove the field label for the Customer's Address Line 2 field.

Step	Action
1	Double-click the CLO CADD CAD1 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

How to customize the CLO CADD CAD2 element

The CLO CADD CAD2 element (Customer's Address Line 3) contains the third line of the customer's address. The address will correspond to the name in the CLO CNAM element, so you do not need to print a label for the address fields.

Use this procedure to remove the field label for the Customer's Address Line 3 field.

Step	Action
1	Double-click the CLO CADD CAD2 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

How to customize the CLO CADD CAD3 element

The CLO CADD CAD3 element (Customer's Address Line 4) contains the fourth line of the customer's address. The address will correspond to the name in the CLO CNAM element, so you do not need to print a label for the address fields.

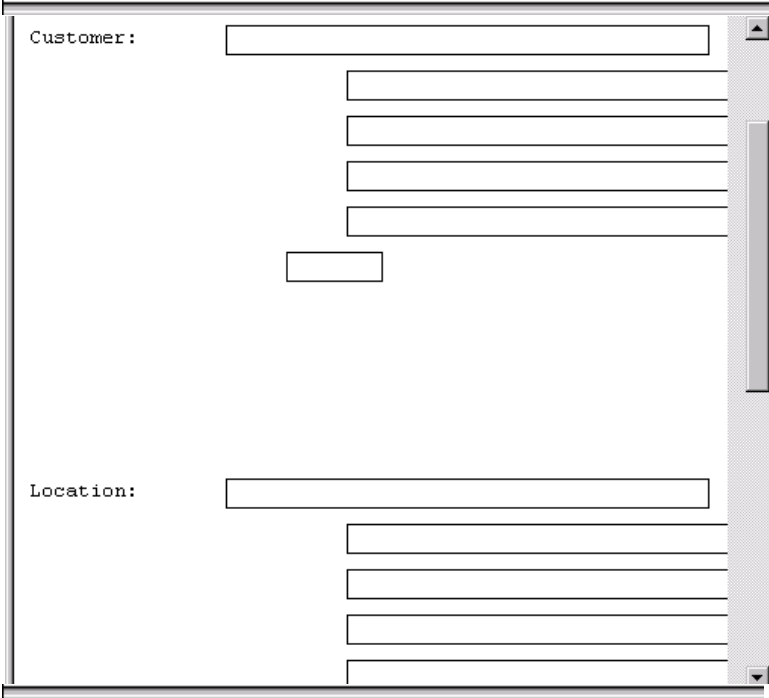
Use this procedure to remove the field label for the Customer's Address Line 4 field.

Step	Action
1	Double-click the CLO CADD CAD3 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

How to customize the CLO CADD CAD4 element

The CLO CADD CAD4 element (Customer’s Post Code) contains the post code of the customer’s address. The post code will correspond to the name in the CLO CNAM element, so you do not need to print a label for this field.

Use this procedure to remove the field label for the Customer’s Post Code field.

Step	Action
1	Double-click the CLO CADD CAD4 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.
5	Click Generate Layout on the Main Toolbar to refresh the display of the print form. The section of the print form that contains the fields in the CLO segment now should look like this (you may need to scroll down the form to see these fields): 

Customizing the ORD Segment

Overview The ORD segment (Order References) contains reference information pertaining to this purchase order, such as the purchase order number, the date the order was placed, and the purchase order code.

How to customize the ORD ORNO ORN0 element The ORD ORNO ORN0 element (Customer's Order Number) contains the purchase order number assigned by the customer. You already used a standard rule for this element to assign the document name. For brevity, you will change the field label to Order Number.

Use this procedure to change the field label for the Customer's Order Number field.

Step	Action
1	Double-click the ORD ORNO ORN0 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, enter Order Number: to replace the existing field label.
4	Click OK to exit the dialog.

How to customize the ORD ORNO ORN2 element The ORD ORNO ORN2 element (Date Order Placed by Customer) contains the date on which the customer placed the purchase order. You will change the screen format for the purchase order date to DD/MM/YY. Also, this element is defined by the standard to be a six-digit date. In this tutorial, the purchase order date will be printed as an eight-digit date, so you will change the element and field lengths to accommodate the longer date. For brevity, you will change the field label to Order Date.

Use this procedure to change the screen format, change the element and field lengths, and rename the field label for the Date Order Placed by Customer field.

Step	Action
1	Double-click the ORD ORNO ORN2 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 8 to allow the entire date, including separators (/), to be contained in this element.
4	From the Form Format drop-down list box, select DD/MM/YY to designate the format for the date on the printout.

Step	Action
5	Select the Print tab.
6	In the Label field, enter Order Date: to replace the existing field label.
7	In the Maximum number of characters field, enter 8 to allow the entire date, including separators (/), to be displayed.
8	Click OK to exit the dialog.

Customizing the ORD ORNO CD07 element

The ORD ORNO CD07 element (Order Code) contains the code representing the type of purchase order (e.g. new order, cancelled order) for this message. You want the more meaningful description of the code to be printed on the printout, instead of the code itself. Therefore, you will hide the Order Code field, but use the code from that element (ORD ORNO CD07) to look up the code description in Code Values List 7 and print that description in another field that you create. The description of the code will be displayed in the new field on the printout. You will rename the new field and change the element and field lengths to accommodate the text from the description of the code.

How to copy the ORD ORNO CD07 element

The description of the EDI code in the ORD ORNO CD07 element is important, even though you do not need to print the code itself. For example, the EDI code value “N” is not descriptive enough for users reading a printout of the purchase order. The description of code “N” (“New Order”) is meaningful, however.

Before you can print the description of the EDI code value, you must create a new element in the ORNO segment to store and print the description. The new ORNO element is the element that will print the description of the Order Code. You will use the Copy and Paste functions to copy EDI information in the form. Copied form components retain all the information of the original form components.

Use this procedure to copy and paste the ORD ORNO CD07 element.

Step	Action
1	Select the ORD ORNO CD07 element.
2	Click Copy on the Main Toolbar.
3	Select the ORNO SCRF composite, which is the last form component in the ORNO segment. The ORNO SCRF composite is the form component <i>after</i> which you want the copy of the ORD ORNO CD07 element to be pasted.
4	Click Paste on the Main Toolbar to paste the ORD ORNO CD07 element. Sterling Gentran:Server prompts you to specify whether you want the contents of the Clipboard pasted as a child (subordinate) of the selected composite, or at the same level as the composite.

Step	Action
5	Click the Paste after selected item (at the same level) radio button to paste the Clipboard contents after the ORNO SCRF composite. A new element (ORD CD07:2) is created. The ORD CD07:2 element is an exact copy of the ORD ORNO CD07 element.
6	Click OK to exit the dialog.

How to change the ORD CD07:2 element and field properties

The system names the new element created from copying the ORD ORNO CD07 element ORD CD07:2. You will rename the new element to identify its purpose, which is to print the description of the code from the ORD ORNO CD07 element.

Note

If a segment or element occurs more than once in a form, it is identified by its name <ID>. The second and subsequent occurrences are identified by <ID>:n, where “n” is the number of the occurrence in the form.

You will rename the element name and field label corresponding to the newly-created ORD CD07:2 element to reflect the contents of the field (the description of the Order Code). You will also increase the field and element lengths to accommodate the longer description.

Use this procedure to change the rename the element name and field label, and change the field and element lengths, for the ORD CD07:2 element.

Step	Action
1	Double-click the ORD CD07:2 element. System Response The Element Properties dialog is displayed.
2	In the Name field, enter CD07_DESC to give the name a more descriptive identifier than its current name. Important Do not use spaces or hyphens (-) in the Name field. You can use the underscore (_) to separate words.
3	Select the Validation tab.
4	In the Max field, enter 35 for the maximum number of characters allowed for this element.
5	Select the Print tab.
6	In the Label field, enter Order Type: to replace the existing field label.
7	In the Maximum number of characters field, enter 35 to allow a thirty-five-character description to be displayed on the printout.
8	Click OK to save the new label and exit the dialog.

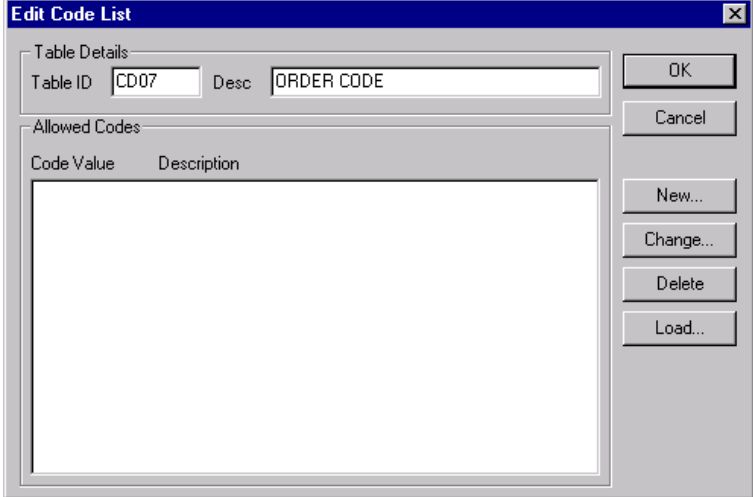
How to hide the ORD ORNO CD07 field and loading a code list table from the standard

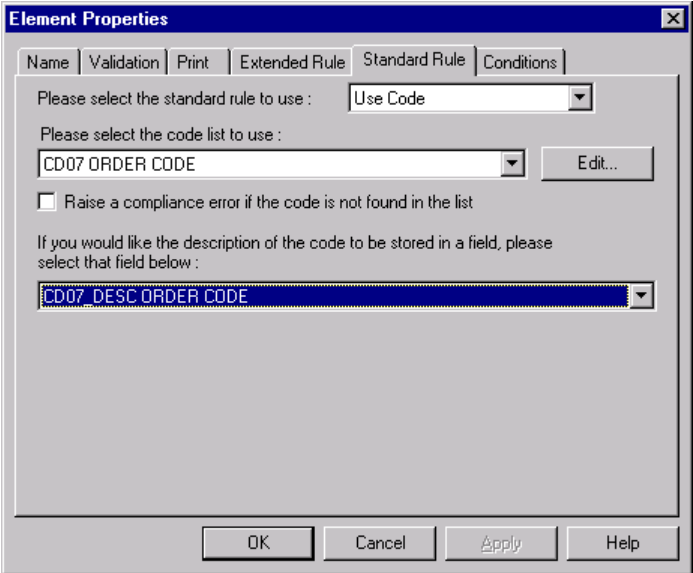
Now that you have created an exact copy of the ORD ORNO CD07 element in order to retain all of the EDI data and formatting associated with that element, you can hide the Order Code field.

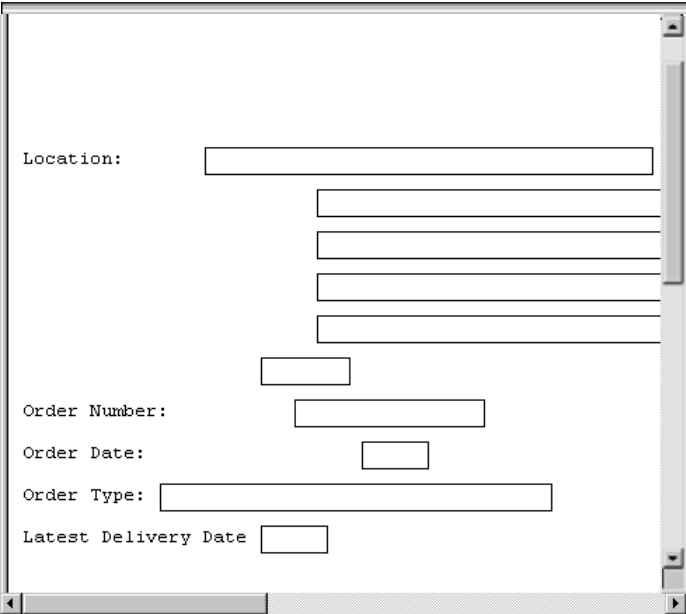
When you use code list tables, you load a code list table from the standard to tell the system which code list table to use in looking up EDI code values. You can load the specific code values you expect to receive in the EDI data, or you can load the entire code list table. For this tutorial, you will load the entire code list table.

Use this procedure to hide the Order Code field and load the code list table from the standard.

Step	Action
1	Double-click the ORD ORNO CD07 element. You need to use a code list table for this element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the Display Properties dialog.
5	Select the Use Standard Rule tab.
6	Click Use Code from the drop-down list.

(Contd) Step	Action
7	<p>Click Edit to access the Edit Code List dialog.</p>  <p>The Table ID field contains “CD07,” the name of the element for which this code list table will be used. The Desc field contains “ORDER CODE,” the description of the element for which this code list table will be used.</p>
8	<p>Click Load to access the Load Code List dialog. You will be prompted to select an ODBC data source name. Select the appropriate DSN and click OK to access the Load Code List dialog. The Codes In Standard list box contains the entire code list table.</p>
9	<p>Click Add All to move all of the codes in the code list table to the Codes Selected list box.</p> <p>Note Adding all the codes in the list (by using Add All) creates a much larger form than if you use only selected codes. However, it is necessary for your users to have all the codes available from which to choose.</p>
10	<p>Click OK to load the code list table and exit the Load Code List dialog.</p>
11	<p>Click Close to exit the Edit Code List dialog.</p>

(Contd) Step	Action
12	<p>From the Store Field drop-down list box, select CD07_DESC ORDER CODE to store the description in the ORD CD07_DESC element you created.</p> <p>The dialog now should look like this:</p> 
13	Click OK to exit the Element Properties dialog.

(Contd) Step	Action
14	<p>Click Generate Layout on the Main Toolbar to refresh the display of the print form.</p> <p>The section of the print form that contains the fields in the ORD segment now should look like this (you may need to scroll down the form to see these fields:</p>  <p>The screenshot shows a window with a scrollable area containing the following fields:</p> <ul style="list-style-type: none">Location: [text box][text box][text box][text box][text box][text box]Order Number: [text box]Order Date: [text box]Order Type: [text box]Latest Delivery Date [text box]

Customizing the DIN Segment

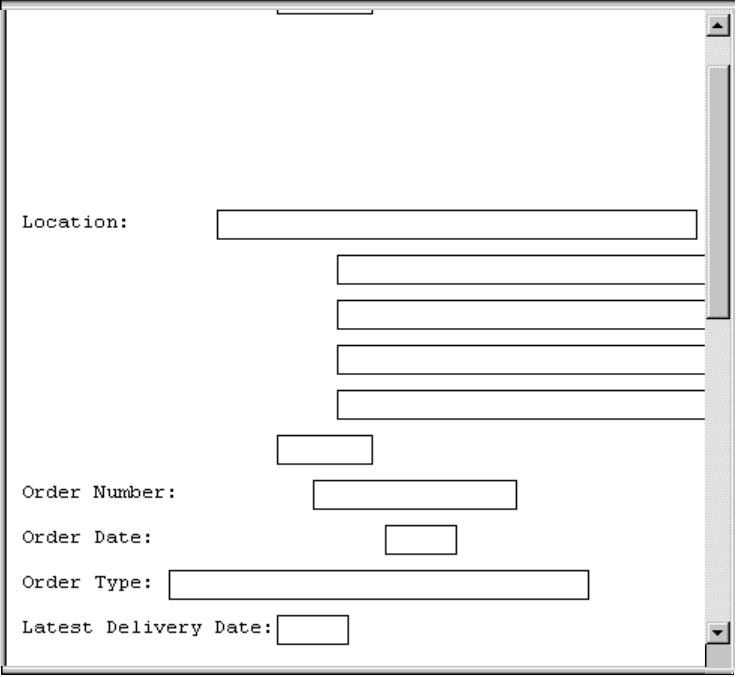
Overview The DIN segment (Delivery Instructions) is a conditional segment that contains details about the delivery of the ordered items. For this tutorial, the only delivery instructions you and your trading partner require is the last date on which the items may be delivered.

How to customize the DIN LDAT element

The DIN LDAT element (Latest Delivery Date) contains the last date on which the ordered items may be delivered. You will change the screen format for the last delivery date to DD/MM/YY. Also, this element is defined by the standard to be a six-digit date. In this tutorial, the last delivery date will be printed as an eight-digit date, so you will change the element and field lengths to accommodate the longer date. In addition, you will add a colon (:) to the field label to make the label consistent with the other field labels on the same frame.

Use this procedure to change the screen format, change the field and element lengths, and add a colon (:) to the field label for the Latest Delivery Date field.

Step	Action
1	Double-click the DIN LDAT element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 8 to allow the entire date, including separators (/), to be contained in this element.
4	From the Form Format drop-down list box, select DD/MM/YY to designate the format for the date on the printout.
5	Select the Print tab.
6	In the Label field, enter “:” after the text in the field label (for consistency in labelling the fields).
7	In the Maximum number of characters field, enter 8 to allow the entire date, including separators (/), to be displayed.
8	Click OK to exit the dialog.

(Contd) Step	Action
9	<p>Click Generate Layout on the Main Toolbar to refresh the display of the print form.</p> <p>The section of the print form that contains the field in the DIN segment now should look like this:</p>  <p>The screenshot shows a window with a scroll bar on the right. The form contains the following fields:</p> <ul style="list-style-type: none">Location: [Text Input][Text Input][Text Input][Text Input][Text Input][Text Input]Order Number: [Text Input]Order Date: [Text Input]Order Type: [Text Input]Latest Delivery Date: [Text Input]

Customizing the OLD Group

Overview The OLD group contains details about each line item in the purchase order. The fields in the OLD group are displayed on a separate frame than the fields you have customized up to now, because the OLD group has a maximum use of 999,999. The fields on the OLD frame will be printed as many times as necessary (up to 999,999 occurrences) before the fields on the next frame (OTR group) are printed.

Customizing the OLD:2 Segment

Overview The OLD:2 segment (Order Line Details) contains line item details for the purchase order.

How to customize the OLD:2 SEQA element

The OLD:2 SEQA element (First Level Sequence Number) contains the line number for each item on the purchase order. Your trading partner will send you the value “1” for the first line item, and will increment each subsequent line item by one. You and your trading partner have agreed that they will order no more than 99999 line items per purchase order. Because each line item will be numbered sequentially, starting with one, you will need a maximum length of only five digits for this field. Therefore, you will change the element and field lengths to five. Also, for brevity, you will rename the field label.

Use this procedure to change the field and element lengths and rename the field label for the First Level Sequence Number field.

Step	Action
1	Double-click the OLD:2 SEQA element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 5 to allow a five-digit number in this element.
4	Select the Print tab.
5	In the Label field, enter Line to replace the existing field label. Note The label for the First Level Sequence Number field ultimately will form the column heading “Line No.” To make the width of the column heading as narrow as possible, you will place “Line” on one line and “No.” below. The Label field does not enable you to enter a label on more than one line, so you will enter “Line” in the Label field, then add “No.” by adding static text later in this tutorial.
6	In the Maximum number of characters field, enter 5 to allow five numeric digits to be displayed on the printout.
7	Click OK to exit the dialog.

How to customize the OLD:2 SPRO SPR1 element

The OLD:2 SPRO SPR1 element (Supplier's Code for the Traded Unit) contains the supplier's internal reference identifying the ordered item. In this tutorial, MWT Manufacturing Co. (the supplier) provides a catalogue to its trading partners (customers). The catalogue lists all the items available for ordering, including the supplier's code for each item. Your trading partner will send you the supplier's number corresponding to each item ordered.

In this tutorial, the supplier's codes do not exceed ten characters, so you will change the field and element lengths to ten. In addition, for brevity, you will rename the field label.

Use this procedure to change the field and element lengths and rename the field label for the Supplier's Code for the Traded Unit field.

Step	Action
1	Double-click the OLD:2 SPRO SPR1 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 10 to allow a ten-character string in this element.
4	Select the Print tab.
5	In the Label field, enter Prod ID to replace the existing field label.
6	In the Maximum number of characters field, enter 10 to allow ten characters to be displayed on the printout.
7	Click OK to exit the dialog.

How to customize the OLD:2 CPRO CPR1 element

The OLD:2 CPRO CPR1 element (Customer's Item Code) contains the customer's internal reference identifying the ordered item. In this tutorial, your trading partner will send you the customer's item code corresponding to each item ordered. However, you do not need this code to be printed on the printout, so you will hide this element.

Use this procedure to hide the Customer's Item Code field.

Step	Action
1	Double-click the OLD:2 CPRO CPR1 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	Clear the Include in print check box to turn the option off.
4	Click OK to exit the dialog.

How to customize the OLD:2 UNOR UNO0 element

The OLD:2 UNOR UNO0 element (Consumer Units in Traded Unit) contains the consumer units information. The standard defines the OLD:2 UNOR UNO0 element as a string data type. However, your trading partner will send you a number-type element in N0 format (formatted with an implicit decimal point and no decimal places). Therefore, you will change the data type and the screen and EDI formats to reflect the data your partner will send you.

Also, you and your partner have decided that none of the items you will trade contain a number of units greater than ten digits. You will change the field and element lengths to reflect the smaller number of units. In addition, for brevity, you will rename the field label.

Use this procedure to change the field and element lengths, the data type, and the screen and EDI formats, as well as to rename the field label, for the Consumer Units in Traded Unit field.

Step	Action
1	Double-click the OLD:2 UNOR UNO0 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 10 to allow a ten-digit number in this element.
4	From the Data Type drop-down list box, select Number to allow a number data type in this element. Sterling Gentran:Server prompts you that changing the field's data type will invalidate its format.

(Contd) Step	Action
5	Click Yes to proceed with modifying the properties of this element.
6	From the Form Format drop-down list box, select N0 to allow a number with an implied decimal point and no decimal places to be displayed on the printout.
7	From the File Format drop-down list box, select N0 to indicate that you expect a number with an implied decimal point and no decimal places.
8	Select the Print tab.
9	In the Label field, enter Cons. Units to replace the existing field label.
10	In the Maximum number of characters field, enter 10 to allow a ten-digit number to be displayed on the printout.
11	Click OK to exit the dialog.

How to customize the OLD:2 UNOR CD04 element

The OLD:2 UNOR CD04 element (Measure Indicator) contains the abbreviation for the ordering measure (e.g. kilograms, metres, litres) for the ordered item. For brevity, you will rename the field label.

Use this procedure to rename the field label for the Measure Indicator field.

Step	Action
1	Double-click the OLD:2 UNOR CD04 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, enter Unit to replace the existing field label.
4	Click OK to exit the dialog.

How to customize the OLD:2 OQTY OQT0 element

The OLD:2 OQTY OQT0 element (Number of Traded Units Ordered) contains the total number of units ordered (quantity) for each line item, in units defined in the OLD:2 UNOR CD04 element. The standard defines the OLD:2 OQTY OQT0 element as a string data type. However, your trading partner will send you a number-type element in N0 format (formatted with an implicit decimal point and no decimal places). Therefore, you will change the data type and the screen and EDI formats to reflect the data your partner will send you.

Also, you know that your trading partner will order no more than 999999 (a six-digit number) of any one item, so you will change the maximum length to six for this field. You will change the field and element lengths to reflect the smaller quantities. In addition, for brevity, you will rename the field label.

Use this procedure to change the field and element lengths, the data type, and the screen and EDI formats, as well as to rename the field label, for the Number of Traded Units Ordered field.

Step	Action
1	Double-click the OLD:2 OQTY OQT0 element. System Response The Element Properties dialog is displayed.
1	Select the Validation tab.
2	In the Max field, enter 6 to allow a six-digit number in this element.
3	From the Data Type drop-down list box, select Number to allow a number data type in this element. Sterling Gentran:Server prompts you that changing the field's data type will invalidate its format.
4	Click Yes to proceed with modifying the properties of this element.
5	From the Form Format drop-down list box, select N0 to allow a number with an implied decimal point and no decimal places to be displayed on the printout.
6	From the File Format drop-down list box, select N0 to indicate that you expect a number with an implied decimal point and no decimal places.
7	Select the Print tab.
8	In the Label field, enter Qty Ord to replace the existing field label.
9	In the Maximum number of characters field, enter 6 to allow a six-digit number to be displayed on the printout.
10	Click OK to exit the dialog.

How to customize the OLD:2 OUCT OUC0 element

The OLD:2 OUCT OUC0 element (Cost Price) contains the price per unit ordered. This price is the net cost in pounds (e.g. after deducting line discounts, etc., but before the application of VAT) for an item. Your trading partner will send you prices in N4 format (formatted with an implicit decimal point and four decimal places), but you want the price to be displayed on the printout in R4 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the price to look on the printout.

Also, you know that the items you sell to Pet Zone are not priced at more than £9999.99 each, so this field needs a maximum length of only ten (four places for the pounds; four

places for the pence, if present; one place for the decimal point; and one place for a plus or minus sign, if present). You will change the field and element lengths to reflect the prices you expect. In addition, you will rename the field label Price Each.

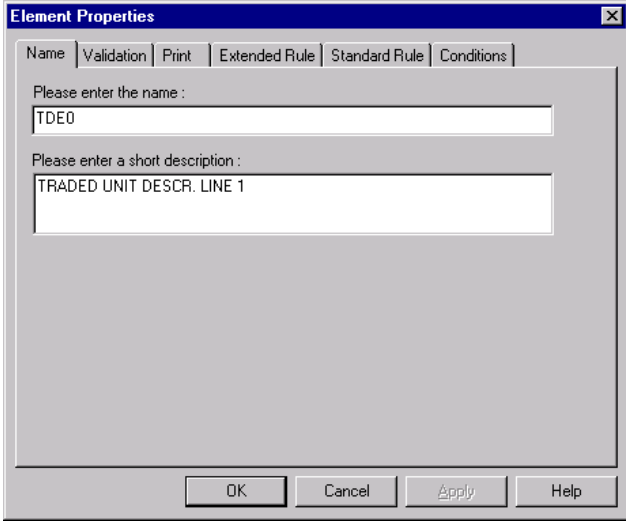
Use this procedure to change the field and element lengths, change the screen format, and rename the field label for the Cost Price field.

Step	Action
1	Double-click the OLD:2 OUCT OUC0 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 10 to allow ten numeric digits in this field, including a plus or minus sign and a decimal point.
4	From the Form Format drop-down list box, select R4 to allow a number with an explicit decimal point and four decimal places to be displayed on the printout.
5	Select the Print tab.
6	In the Label field, enter Price Each to replace the existing field label.
7	In the Maximum number of characters field, enter 10 to allow eight digits on the printout, including a plus or minus sign and a decimal point.
8	Click OK to exit the dialog.

How to customize the OLD:2 TDES TDE0 element

The OLD:2 TDES TDE0 element (Traded Unit Descr. Line 1) contains the first line of the description of the ordered item. The description will be self-explanatory in the context of the rest of the line item information, so you will remove the label from this field.

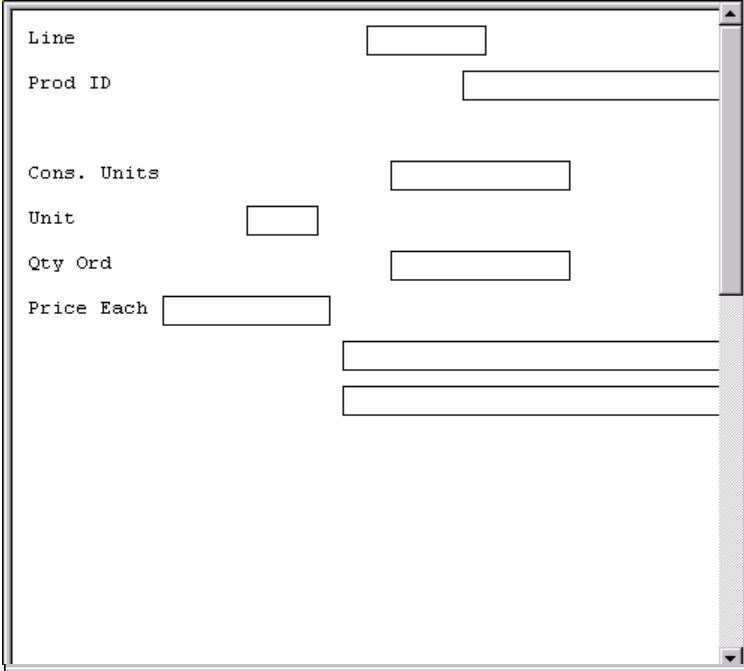
Use this procedure to remove the field label for the Traded Unit Descr. Line 1 field.

Step	Action
1	<p>Double-click the OLD:2 TDES TDE0 element.</p> <p>System Response The Element Properties dialog is displayed.</p> 
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.

How to customize the OLD:2 TDES TDE1 element

The OLD:2 TDES TDE1 element (Traded Unit Descr. Line 2) contains the second line of the description of the ordered item. The description will be self-explanatory in the context of the rest of the line item information, so you will remove the label from this field.

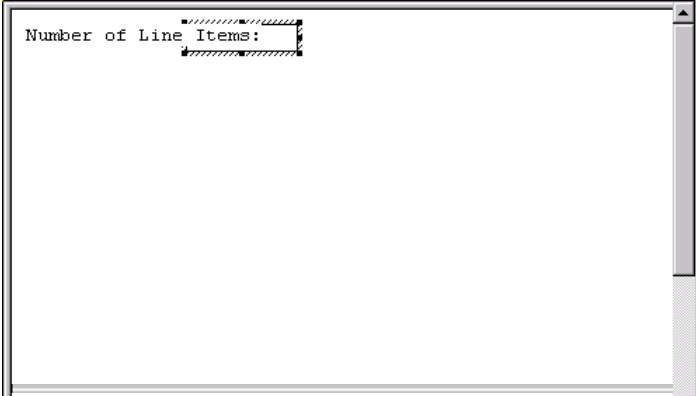
Use this procedure to remove the field label for the Traded Unit Descr. Line 2 field.

Step	Action
1	Double-click the OLD:2 TDES TDE1 element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, delete the existing field label.
4	Click OK to exit the dialog.
5	Click Generate Layout on the Main Toolbar to refresh the display of the print form. The OLD frame now should look like this:  <p>The screenshot shows a window titled 'OLD' containing a form layout. The form has several fields with labels to their left: 'Line', 'Prod ID', 'Cons. Units', 'Unit', 'Qty Ord', and 'Price Each'. Each label is followed by a rectangular input field. The 'Line' field is at the top right, 'Prod ID' is below it to the right, 'Cons. Units' is below that to the right, 'Unit' is below that in the middle, 'Qty Ord' is below that to the right, and 'Price Each' is at the bottom left. There are also two empty rectangular boxes at the bottom right of the form area. The window has a vertical scrollbar on the right side.</p>

How to customize the OTR LORD element

The OTR LORD element contains the Lines Ordered. You will rename the field label.

Use this procedure to rename the field label for the Lines Ordered field.

Step	Action
1	Double-click the OTR LORD element. System Response The Element Properties dialog is displayed.
2	Select the Print tab.
3	In the Label field, enter Number of Line Items: to replace the existing field label.
4	Click OK to exit the dialog.
5	Click Generate Layout on the Main Toolbar to refresh the display of the print form. The OTR frame now should look like this: 

Now you are ready to format the fields and their labels to make the fields on the purchase order more consistent and visually attractive.

Format the Print Form

Overview

Introduction

In the previous section of this tutorial, you customized the print form for a TRADACOMS ANA001 ORDERS release 9 purchase order that you will use to print the data you receive from Pet Zone. After successfully customizing the fields and elements of the print form, you are ready to format the layout of the form.

One form can consist of several frames. Each group (with a maximum use greater than one) and repeating segment has a corresponding frame that contains all the groups, segments, and elements at that level. When the form is printed, the frames are printed consecutively, in the order in which they occur in the form. Each frame is *not* printed on a separate page.

This section explains how to format the form, field by field.

Resizing the Header Frame

Overview When a printout is produced based on the customized print form, the information is arranged according to how the frames and the fields contained on them were arranged when the form was compiled. You should eliminate unnecessary space as you arrange the fields on each frame.

Note

When the form is generated, the upper left corner of each frame in the form is placed in the upper left corner of the Layout Window.

Procedure Use this procedure to resize the header frame (containing fields from the ORDHDR group and the CLO, ORD, and DIN segments).

Step	Action
1	Click the ORDHDR group to display the Order File Header (header) frame in the Layout Window.
2	<p>To display more of the form on your screen, click and drag the centre bar between the EDI File Format Window and the Layout Window to the left until the Layout Window is wide enough to display as much of the form as you want to view.</p> <p>Note You should be able to view the entire width of the frame. If the right side of the header frame (and the vertical scroll bar for the frame) are not visible in the Layout Window, then move the centre bar between the EDI File Format Window and the Layout Window farther to the left so the entire frame is displayed in the Layout Window. Another way to view more of the frame is to use the horizontal scroll bar at the bottom of the Forms main window to bring the right side of the header frame into view.</p>
3	<p>To resize the header frame, click and drag the right side of the frame approximately to the 20 cm mark on the horizontal ruler (a form with a width of 20 cm can be printed on an A4 sheet of paper).</p> <p>Note Use the horizontal ruler at the top of the frame to help you resize the frame.</p>

Adding a Title to the Form

Overview You want the form to have a title designating the standard agency (TRADACOMS), the version (ANA001), the type of message (purchase order), the release (9), and the trading partner (Pet Zone) for which this form is used. You will add a title to the print form by adding static text.


Procedure Use this procedure to add and position the title for the form.

Step	Action
1	Click Add Text on the Main Toolbar. System Response A text box is added to the current frame, displayed in the upper left corner of the frame. If the template is larger than the frame (there is a scroll bar on the right side of the frame), the static text is displayed in the upper left corner of the part of the template that is displayed, not at the top of the template.
2	Select the new text field and enter TRADACOMS ANA001 ORDERS Release 9 . The Text Properties dialog is displayed as you are typing. Click OK to add the text.
3	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
4	Select the new text field and enter Pet Zone . The Text Properties dialog is displayed as you are typing. Click OK to add the text. System Response The static text you added is displayed in the upper left corner of the frame.

Centring the Text

Overview This section describes how to center text on a form.

Procedure Use this procedure to centre the static text at the top of the purchase order form.

Step	Action
1	Click and drag the first line of static text (TRADACOMS ANA001 ORDERS Release 9) so that the text is centred on the first line of the frame.
2	<p>Click and drag the second line of static text (Pet Zone) so that the text is centred on the second line of the frame.</p> <p>The header frame now should look like this:</p> 

Arranging the Header Fields

Overview By default, each field and its associated label are displayed on their own line. However, it is common for purchase orders and forms to arrange some fields in columns of information. The first fields you rearrange will be the header fields, which are the fields associated with the ORDHDR group and the CLO, ORD, and DIN segments.

You prevented some of the field labels from being printed (by removing the field label in the Label field of the Display Properties dialog). For these fields, the fields will be displayed on your print form, but their associated labels will not.

Note

If you forget which unlabelled field contains what data, you can click the field. Its associated element will be highlighted in the EDI File Format Window, providing you with a description of the field.

How to resize the header fields

When you customized the element properties in the previous section of this chapter, you changed the display length (on the Display Properties dialog) for some of the fields on the header frame. The fields that are displayed in the Layout Window currently reflect the default display lengths for the fields. To reflect the new sizes of the fields on the Layout Window, you must select the fields for which you changed the display lengths, then resize the fields.

Note

If a field and its corresponding field label move together, the Lock Labels to Fields option is turned on. Click the Lock Labels button on the Main Toolbar to turn off the Lock Labels option.

Use this procedure to resize the fields on the header frame.

Step	Action
1	Select the Latest Delivery Date and Order Date fields.
2	<p>Select Size to Length from the Display menu.</p> <p>System Response The selected fields will be resized to the lengths specified in the Maximum number of characters field of the Display Properties dialog for each field.</p> <p>Note If you accidentally format a form component in a way you did not intend, select Undo from the Display menu to undo your last formatting action.</p>

How to move and align the header fields and field labels

Use this procedure to move and align the fields and field labels on the header frame.

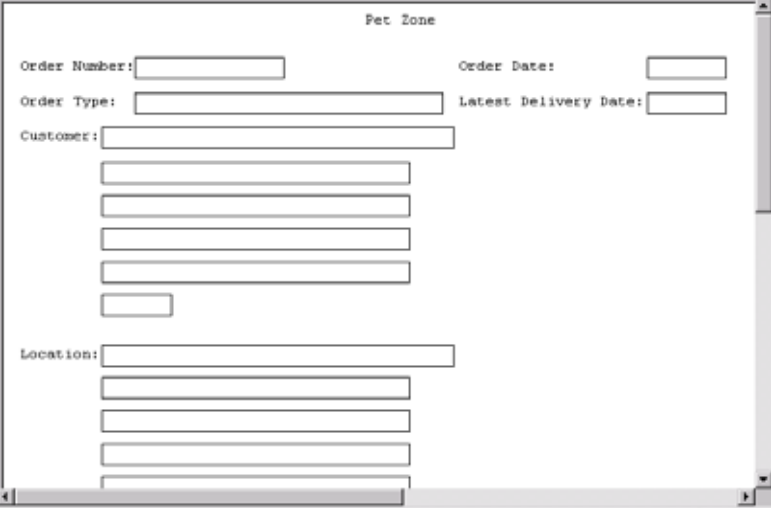
Note

If a field is not in the part of the frame that currently is displayed, use the scroll bar to scroll down the frame until you locate the hidden field(s).

Step	Action
1	Select each field individually and drag it closer to its respective field label. (Do not move fields that are not labelled.)
2	Select the Order Number label and field and drag them to the upper left corner on the frame (below the heading). Note To select more than one field or field label, click and drag the mouse diagonally across all the fields and field labels you want to select. When you release the mouse button, all the fields and field labels completely included within the space formed by dragging the mouse will have handles, indicating that they were selected.
3	Select the Order Date label and field and drag them to the right of the Order Number label and field (at approximately 12.5 cm on the horizontal ruler).
4	Select the Order Type label and field and drag them below the Order Number label and field.
5	Select the Latest Delivery Date field and drag it below the Order Date label and field.
6	Select the Customer label and field and drag them below the Order Type label and field.
7	Select the following fields and drag them below the Customer field: <ul style="list-style-type: none"> ▶ Customer's Address Line 1 ▶ Customer's Address Line 2 ▶ Customer's Address Line 3 ▶ Customer's Address Line 4 ▶ Customer's Post Code
8	Select the Location label and field and drag them below the Customer's Post Code field.

(Contd) Step	Action
9	Select the following fields and drag them below the Location field: <ul style="list-style-type: none"> ▶ Customer's Address Line 1 ▶ Customer's Address Line 2 ▶ Customer's Address Line 3 ▶ Customer's Address Line 4 ▶ Customer's Post Code
10	Select the following field labels: <ul style="list-style-type: none"> ▶ Order Number ▶ Order Type ▶ Customer ▶ Location
11	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected field labels are aligned.
12	Select the Order Date and Latest Delivery Date field labels. Note To select more than one item on a frame, click the first item, then press CTRL and click the second item.
13	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected field labels are aligned.
14	Select the Order Type and Order Number fields (in that order).
15	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the Order Type and Order Number fields are aligned.
16	Select the Order Date and Latest Delivery Date fields (in that order).
17	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the Latest Delivery Date and Order Date fields are aligned.
18	Select all the Customer and Location fields (Customer's Address Line 1, Customer's Address Line 2, Customer's Address Line 3, Customer's Address Line 4, and Customer's Post Code).
19	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected fields are aligned.

(Contd) Step	Action
20	Click the Lock Labels button on the Main Toolbar to turn on the Lock Labels function. When you select a field, its corresponding field label will be selected also.
21	Select the Order Number and Order Date fields. (Their field labels will be selected, too, because you have the Lock Labels function turned on.)
22	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of the selected labels and fields are aligned.
23	Select the Order Type and Latest Delivery Date fields. (Their field labels will be selected, too.)
24	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of the selected labels and fields are aligned.
25	Select the Customer field. (Its field label will be selected, too.)
26	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of the Customer label and field are aligned.
27	Select the Location label and field. (Its field label will be selected, too.)
28	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of the Location label and field are aligned.
29	To resize the frame, click and drag the bottom of the frame to just below the Customer's Post Code field for the Location address.

(Contd) Step	Action
30	<p>Click the Lock Labels button on the Main Toolbar to turn off the Lock Labels function.</p> <p>The header frame now should look like this:</p>  <p>The screenshot shows a window titled "Pet Zone" containing a form with the following fields:</p> <ul style="list-style-type: none">Order Number: <input type="text"/>Order Date: <input type="text"/>Order Type: <input type="text"/>Latest Delivery Date: <input type="text"/>Customer: <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/>Location: <input type="text"/><input type="text"/><input type="text"/><input type="text"/><input type="text"/>

Arranging the Line Item (OLD) Fields

Overview The fields that contain information about each line item for the purchase order are contained on a separate frame. To access this frame, select the OLD group.

You prevented some of the field labels from being displayed, so you will see all of the fields in the layout of your print form, but not all of the associated labels. In case you have forgotten which unlabelled field contains what data, you can click the field. The name of the element will be highlighted in the EDI File Format Window.

Before you arrange the line item fields and their frame, first you will resize the frame to give it the same width as the other frames. You will then move and resize the fields and field labels, as well as add static text to the form.

How to resize the line item (OLD) frame

Use this procedure to resize the line item (OLD) frame.

Note

When the form is generated, the upper left corner of each frame in the form is placed in the upper left corner of the Layout Window.

Step	Action
1	Click the OLD group to display the line item (OLD) frame in the Layout Window.
2	Click and drag the right side of the frame to the 20 cm mark on the horizontal ruler (a form with a width of 20 cm can be printed on an A4 sheet of paper). Note Use the ruler at the top of the frame to help you resize the frame.

How to resize the line item fields

Use this procedure to resize the line item fields.

Step	Action
1	<p>Select the following fields:</p> <ul style="list-style-type: none"> ▶ Line ▶ Prod ID ▶ Cons. Units ▶ Qty Ord ▶ Price Each <p>Note To select more than one field on a frame, click the first field, then press CTRL and click the second field.</p>
2	<p>Select Size to Length from the Display menu. All selected fields will be resized to the lengths specified in the Maximum number of characters field of the Element Properties dialog for each field.</p>

How to complete the line no. column heading

You can add column headings (using static text) to the frame to change the way the field labels are displayed in the form. Currently, each field label in the form consists of one line of text.

In this tutorial, you want to label the Line field “Line No.” You do not want the label to extend beyond the margins of the field that it labels, so you will place “Line” on one line on the frame and “No.” on the line below.

Use this procedure to add and position static text.

Step	Action
1	<p>Select all the fields and field labels on the frame.</p> <p>Note To select more than one field or field label, click and drag the mouse diagonally across all the fields and field labels you want to select.</p>
2	<p>Click and drag them to the bottom portion of the frame. You will be arranging the fields at the top of the frame, so moving the fields and field labels out of the way initially will give you room to work with at the top of the frame.</p>
3	<p>Click Add Text on the Main Toolbar. Text is added to the current frame, displayed in the upper left corner of the frame. If the template is larger than the frame (there is a scroll bar on the right side of the frame), the static text is displayed in the upper left corner of the part of the template that is displayed, not at the top of the template.</p>

Step	Action
4	<p>In the new text field, enter No. (note the full stop included in the text).</p> <p>Note This field already has a label named “Line”. To complete the identification of this field, you will add static text with the name “No.” After you add the static text for this field, you will move “No.” below “Line” to create a column heading for the fields containing the line item number.</p> <p>The text you added is displayed in the upper left corner of the frame.</p>
5	<p>Select the static text you added (“No.”) and drag it to the bottom of the frame. Moving the static text out of the way will give you more room at the top of the frame.</p>

Adding lines separating column headings and fields

In this print form, rectangular boxes are used to designate fields. The boxes make it easy to distinguish fields from field labels and static text. In the printed report, there will not be rectangular boxes surrounding the data in the fields. The printed field data and the field labels tend to look the same on the printout (same typeface, same size text, no boldface or italic type). You can make the field labels and static text stand out from the fields containing the actual data by adding lines separating the labels from the fields. You will add static text to the form to add the separating lines.

You will add the following lines of static text (hyphens) to the form:

Static Text	Number of Hyphens	Placement on Form
-----	Seven	Below the No. static text
-----	Thirteen	Below the Prod ID field label
-----	Eight	Below the Qty Ord field label
-----	Eight	Below the Unit field label
-----	Thirteen	Below the Cons. Units field label
-----	Thirteen	Below the Price Each field label

When you finish adding the static text and moving each line of static text to its proper location, the line item (OLD) frame should look like this:

You will add all of the static text, then move each static text to its proper location.

Procedure Use this procedure to add and position separating lines (-----) in the form.

Step	Action
1	Click Add Text on the Main Toolbar. Text is added to the current frame, displayed in the upper left corner of the frame. If the template is larger than the frame (there is a scroll bar on the right side of the frame), the static text is displayed in the upper left corner of the part of the template that is displayed, not at the top of the template.
2	Select the new text field and enter ----- (seven hyphens). This series of hyphens will form a separating line between the words Line No. and the field below. The Text Properties dialog is displayed as you are typing. Click OK to add the text.
3	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
4	Select the new text field and enter ----- (thirteen hyphens). This series of hyphens will form a separating line between the words Prod ID and the field below. The Text Properties dialog is displayed as you are typing. Click OK to add the text.
5	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
6	Select the new text field and enter ----- (eight hyphens). This series of hyphens will form a separating line between the words Qty Ord and the field below. The Text Properties dialog is displayed as you are typing. Click OK to add the text.
7	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
8	Select the new text field and enter ----- (eight hyphens). This series of hyphens will form a separating line between the word Unit and the field below. The Text Properties dialog is displayed as you are typing. Click OK to add the text.
9	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
10	Select the new text field and enter ----- (thirteen hyphens). This series of hyphens will form a separating line between the words Cons. Units and the field below. The Text Properties dialog is displayed as you are typing. Click OK to add the text.
11	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.

(Contd) Step	Action
12	<p>Select the new text field and enter ----- (thirteen hyphens). This series of hyphens will form a separating line between the words Price Each and the field below. The Text Properties dialog is displayed as you are typing. Click OK to add the text.</p> <p>The separating lines (static text) you added are displayed in the upper left corner of the frame.</p>
13	<p>Select all the static text you added and drag it to the bottom of the frame. Moving the static text out of the way will give you more room at the top of the frame.</p> <p>Note To select more than one field or field label, click and drag the mouse diagonally across all the fields and field labels you want to select.</p>

Moving the line item fields, labels, and separating lines

The line item (OLD) frame now contains all of the fields, labels, and separating lines that will be arranged on the form to create columns of information. Now you are ready to move the fields, labels, and separating lines to their proper locations on the frame.

How to arrange the Line No. column

Use this procedure to arrange the Line No. column on the line item (OLD) frame.

Step	Action
1	Select the Line field label and drag it to the upper left corner on the frame.
2	Select the No. static text and drag it below the Line field label.
3	Select the first separating line you added (seven hyphens) and drag it below the No. static text.
4	Select the Line field and drag it below the separating line you just moved.

How to arrange the Prod ID column

Use this procedure to arrange the Prod ID column on the line item (OLD) frame.

Step	Action
1	Select the Prod ID field label and drag it to the right of the No. static text.
2	Select the second separating line you added (thirteen hyphens) and drag it below the Prod ID field label.
3	Select the Prod ID field and drag it below the separating line you just moved.

How to arrange the Qty Ord column

Use this procedure to arrange the Qty Ord column on the line item (OLD) frame.

Step	Action
1	Select the Qty Ord field label and drag it to the right of the Prod ID field label.
2	Select the third separating line you added (eight hyphens) and drag it below the Qty Ord field label.
3	Select the Qty Ord field and drag it below the separating line you just moved.

How to arrange the unit column

Use this procedure to arrange the Unit column on the line item (OLD) frame.

Step	Action
1	Select the Unit field label and drag it to the right of the Qty Ord field label.
2	Select the fourth separating line you added (eight hyphens) and drag it below the Unit field label.
3	Select the Unit field and drag it below the separating line you just moved.

How to arrange the cons. units column

Use this procedure to arrange the Cons. Units column on the line item (OLD) frame.

Step	Action
1	Select the Cons. Units field label and drag it to the right of the Unit field label.
2	Select the fifth separating line you added (thirteen hyphens) and drag it below the Cons. Units field label.
3	Select the Cons. Units field and drag it below the separating line you just moved.

How to arrange the price each column

Use this procedure to arrange the Price Each column on the line item (OLD) frame.

Step	Action
1	Select the Price Each field label and drag it to the right of the Cons. Units field label.
2	Select the sixth separating line you added (thirteen hyphens) and drag it below the Price Each field label.
3	Select the Price Each field and drag it below the separating line you just moved.

How to move the description fields

The description fields (Traded Unit Descr. Line 1 and Traded Unit Descr. Line 2) will not be placed in a column. Rather, these fields will be placed below the rest of the fields on the line item (OLD) frame.

Use this procedure to move the description fields.

Step	Action
1	Select the Traded Unit Descr. Line 1 and Traded Unit Descr. Line 2 fields. Note To select more than one field or field label, click and drag the mouse diagonally across all the fields and field labels you want to select.
2	Drag them below the row of fields near the top of the frame.

How to resize the line item (OLD) frame

You should resize the line item (OLD) frame to eliminate unnecessary space resulting from arranging the fields on the frame.

To resize the frame, click and drag the bottom of the frame to just below the description fields.

The line item (OLD) frame now should look like this:

Line No.	Prod ID	Qty Ord	Unit	Cons. Units	Price Each
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>					
<input type="text"/>					

How to align rows

One of the remaining tasks in formatting the line item frame is to align the fields, field labels, and static text. First, you will align the items in rows to give the form a consistent appearance. Then, you will align the items in columns later in this tutorial.

Use this procedure to align the fields, field labels, and static text by row (horizontally).

Step	Action
1	Select the following field labels and static text: <ul style="list-style-type: none"> ▶ No. ▶ Prod ID ▶ Qty Ord ▶ Unit ▶ Cons. Units ▶ Price Each <p>Note To select a group of items, click and drag the mouse diagonally across all the items you want to select.</p>
2	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of all selected field labels and static text are aligned in a row.
3	Select all the separating lines between column headings and fields.
4	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of all selected static text are aligned in a row.
5	Select the following fields: <ul style="list-style-type: none"> ▶ Line No. ▶ Prod ID ▶ Qty Ord ▶ Unit ▶ Cons. Units ▶ Price Each
6	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of all selected fields are aligned in a row.
7	Select all the separating lines between column headings and fields.
8	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of all selected static text are aligned in a row.

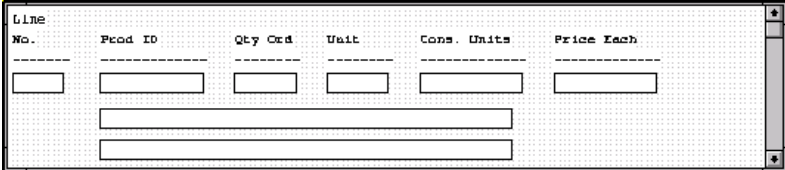
(Contd) Step	Action
9	<ul style="list-style-type: none"> ▶ Select the following fields: ▶ Line No. ▶ Prod ID ▶ Qty Ord ▶ Unit ▶ Cons. Units ▶ Price Each
10	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of all selected fields are aligned in a row.

How to align columns

Now, you will align the fields, field labels, and static text in columns to help give the form a consistent appearance.

Use this procedure to align the fields, field labels, and static text in columns.

Step	Action
1	Select the Line No. column heading, its separating line, and the Line No. field. Note To select a group of items, click and drag the mouse diagonally across all the items you want to select.
2	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. All selected items are left-aligned in a column.
3	Select the Prod ID column heading, its separating line, the Prod ID field, and both description fields (Traded Unit Descr. Line 1 and Traded Unit Descr. Line 2). Note To select more than one item on a frame, click the first item, then press CTRL and click the second item.
4	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. All selected items are left-aligned in a column.
5	Select the Qty Ord column heading, its separating line, and the Qty Ord field.

(Contd) Step	Action
6	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. All selected items are left-aligned in a column.
7	Select the Unit column heading, its separating line, and the Unit field.
8	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. All selected items are left-aligned in a column.
9	Select the Cons. Units column heading, its separating line, and the Cons. Units field.
10	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. All selected items are left-aligned in a column.
11	Select the Price Each column heading, its separating line, and the Price Each field.
12	<p>Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. All selected items are left-aligned in a column.</p> <p>The line item (OLD) frame now should look like this:</p> 

Creating the line item frame without column headings

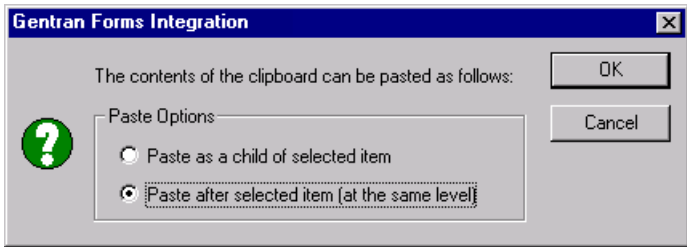
You have completed formatting the line item (OLD) frame so that the line item information will be displayed in columns and rows. If you were to register the translation object now with Sterling Gentran:Server and run EDI data through the translation object, then you would see that the column headings would be repeated for every line item.

The column headings need to be printed on the printout only once, so you will copy and paste the OLD group to create a second OLD group (named OLD:3). The formatting in the OLD group will be retained in the OLD:3 group. You will change the maximum use of the first OLD group to one (so that the column headings are printed only once). Then, you will remove the column headings in the OLD:3 group from the area that will be printed, leaving only the fields for printing the information on the printout.

In addition, you will change the maximum use of the OLD:3 group to 999,998. Your partner can send you up to 999,999 line items, so the total maximum use of both OLD groups does not need to exceed 999,999. The maximum use of the OLD group will be changed to one, and the maximum use of the OLD:3 group will be changed to 999,998.

How to copy and paste the OLD group

Use this procedure to copy and paste the OLD group.

Step	Action
1	Select the OLD group.
2	Click Copy on the Main Toolbar.
3	<p>Select Paste on the Main Toolbar to paste the OLD group after the existing OLD group.</p> <p>System Response Sterling Gentran:Server prompts you to specify whether you want the contents of the clipboard pasted as a child (subordinate) of the selected group, or at the same level as the group.</p> 
4	Click the Paste after selected item (at the same level) radio button to paste the Clipboard contents after the original OLD group.
5	Click OK to exit the dialog. The pasted group is named OLD:3.

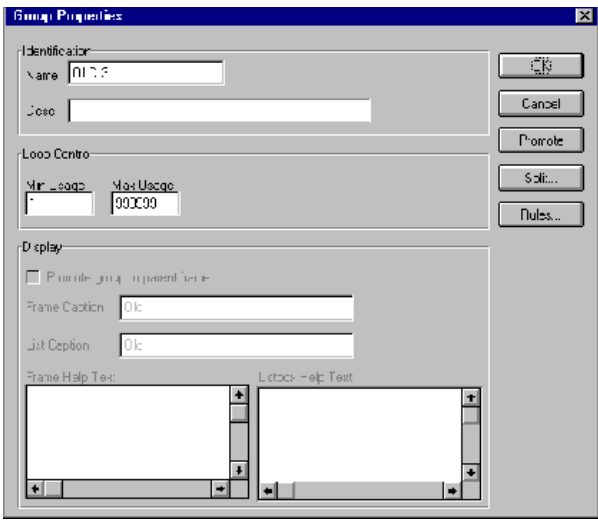
How to change the maximum use of the OLD group

Use this procedure to change the maximum use of the OLD group.

Step	Action
1	Click the OLD group with the right mouse button to access the shortcut menu.
2	Select Properties from the shortcut menu. System Response The Group Properties dialog is displayed.
3	In the Max Usage field, enter 1 to indicate that this group can be used only once in each purchase order.
4	Click OK to exit the Group Properties dialog.

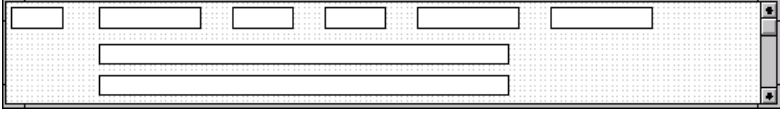
How to change the maximum use of the OLD:3 group

Use this procedure to change the maximum use of the OLD:3 group.

Step	Action
1	Click the OLD:3 group with the right mouse button to access the shortcut menu.
2	Select Properties from the shortcut menu. System Response The Group Properties dialog is displayed.
	
3	In the Max Usage field, enter 999998 to indicate that this group can be used up to 999,998 times in each purchase order.
4	Click OK to exit the Group Properties dialog.

**How to move the
OLD:3 column
headings below the
print area**

Use this procedure to move the column headings on the second line item frame (OLD:3) below the print area, so the headings will not be printed.

Step	Action
1	Click Generate Layout on the Main Toolbar to refresh the display of the print form.
2	Select the OLD:3 group. Its corresponding frame is displayed in the Layout Window.
3	<p>Select all of the column headings and separating lines on the frame, and drag them below the bottom of the frame so they are not displayed. These items still will be included in the print form, but they will not be printed on the printout.</p> <p>Note To select more than one field label or static text, click and drag the mouse diagonally across all the items you want to select.</p>
4	Select all of the fields on the frame, and drag them to the top of the frame.
5	<p>To resize the frame, click and drag the bottom of the frame to just below the description fields (Traded Unit Descr. Line 1 and Traded Unit Descr. Line 2).</p> <p>The second line item (OLD:3) frame now should look like this:</p>  <p>The screenshot shows a rectangular frame with a dotted background. At the top, there are six small rectangular boxes representing column headings. Below these, there are two larger horizontal bars representing description fields. The column headings are positioned below the description fields, indicating they have been moved from their original position at the top of the frame.</p>


Arranging the Order Trailer (OTR) Field

Overview The Number of Line Items field (OTR group) for the purchase order is contained on a separate frame than the rest of the purchase order information because this field contains summary information that you want to be printed at the bottom of the form.

You will resize the Order Trailer (OTR) frame to give it the same width as the header and line item frames.

How to move the order trailer (OTR) field

Use this procedure to move the Number of Line Items field on the Order Trailer (OTR) frame.

Step	Action
1	Select the Number of Line Items field and drag it to the right of its field label.
2	Select the Number of Line Items label and field. Note To select more than one field label or static text, click and drag the mouse diagonally across all the items you want to select.
3	Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The tops of the Number of Line Items label and field are aligned.
4	To resize the Order Trailer (OTR) frame, click and drag the bottom of the frame to just below the Number of Line Items label and field.
5	Select Save from the File menu to save the form. The Order Trailer (OTR) frame now should look like this: 

You have completed your Purchase Order form and you are ready to compile the form.

Finalize the Form

Overview

Introduction

Now that you have created and customized the print form, you are ready to compile the form to generate the translation object (*.TPL) that Sterling Gentran:Server uses before you print the report and test the compiled translation object.

Compiling the Form

Overview The Compile function compiles the form. The form that you create using Sterling Gentran:Server is a *source form*. When that source form is compiled, the result is a *compiled translation object*.

This translation object must be registered with the Sterling Gentran:Server system before you can use it. You will use the Compile function after the form is completed and saved.

Procedure Use this procedure to compile the form.

Step	Action
1	Select Compile from the File menu to display the Run-Time Translation Object Name dialog.
2	<p>Click Save to accept the translation object name (pettordp.tpl) in the File name field.</p> <p>This name for the compiled translation object (.TPL file) is the same filename as the source form (.STP file). Preserving the same filename (with different file extensions) ensures that the relationship between the source form and the compiled translation object remains evident.</p> <p>CAUTION</p> <p>BE VERY CAREFUL NOT TO OVERLAY THE SOURCE FORM WITH THE COMPILED TRANSLATION OBJECT. USE THE .TPL FILE EXTENSION TO DISTINGUISH THE COMPILED TRANSLATION OBJECT.</p>
3	The system will compile the form and generate an error report. The error report is displayed in the Compile Errors dialog.
4	<p>Click OK to exit the Compile Errors dialog. The date on which you compiled the form is loaded automatically into the Compiled on field on the Translation Object Details dialog.</p> <p>Note</p> <p>If the Compile Errors dialog contains errors, you must fix the problem(s) by redoing the appropriate section of the tutorial. Recompile the form after you correct the error(s) and save the form.</p>
5	Select Save from the File menu to save the form.

Printing the Report

Overview The Sterling Gentran:Server report enables you to validate and review the translation object, and make modifications as needed. If you review the report and determine that the translation object is incorrect, you should reiterate the form creation process as many times as necessary (make the modifications, save the form, recompile the form, and print the report again).

Procedure Use this procedure to print the Sterling Gentran:Server report.

Step	Action
1	Select Print from the File menu to access the Print Options dialog.
2	<p>Click OK to accept the defaults on this dialog (all options marked), so the report includes all sections and only the activated form components.</p> <p>System Response The Print dialog is displayed.</p>
3	<p>Do you need to change setup options (to select a specific printer, paper orientation, or size and source of paper) ?</p> <ul style="list-style-type: none"> ▶ If yes, click Properties. Set the appropriate options. Click OK to begin the print process. ▶ If no, click OK to begin the print process.

Testing the Translation Object

Overview Before you can use the TRADACOMS ORDERS Pet Zone print translation object, you must test the translation object to verify that there are no errors in it. To test the translation object, you must have a file containing test data. For this tutorial, you will use the PETTSTT2.INT test file.

Procedure Use this procedure to test the print translation object you just created.

Step	Action
1	<p>Register the PETTORDP.TPL translation object with Sterling Gentran:Server.</p> <p>Reference See the <i>IBM® Sterling Gentran:Server® for Microsoft Windows User Guide</i> for more information on registering a translation object.</p>
2	<p>Import the PETZONE4.PAR partner relationship into Sterling Gentran:Server.</p> <p>Reference See the <i>IBM® Sterling Gentran:Server® for Microsoft Windows User Guide</i> for more information on importing a partner.</p> <p>The default path for the partner is: C:\GENSRVNT\TUTORIAL\PETZONE4.PAR</p>
3	<p>Verify (in Partner Editor) that the ORDERS Pet Zone print translation object is selected for the Inbound Relationship.</p> <p>Reference See the <i>IBM® Sterling Gentran:Server® for Microsoft Windows User Guide</i> for more information on selecting inbound translation objects.</p>
4	<p>Use the Process File option in Sterling Gentran:Server to process the data file (PETTSTT2.INT) through the translation object. The data file is located in the TUTORIAL subfolder under the folder where Sterling Gentran:Server is installed.</p> <p>The default path for the data file is: C:\GENSRVNT\TUTORIAL\PETTSTT2.INT</p>
5	<p>After the message is translated, it is located in the in Documents in Sterling Gentran:Server. Print the message to ensure that the message was translated correctly and that the printout looks the way you want it to look.</p> <p>Reference See the <i>IBM® Sterling Gentran:Server® for Microsoft Windows User Guide</i> for more information on printing messages.</p>

Creating a Screen Entry Form

Contents	Overview	3 - 3
	▶ Introduction	3 - 3
	▶ Phases of Designing a Form	3 - 5
	▶ Getting Started	3 - 6
	Analyze the EDI File	3 - 7
	▶ Basic Tasks	3 - 7
	Design and Create the Form	3 - 18
	▶ Verifying the Global EDI Date Formats	3 - 18
	▶ Defining the Type of Form	3 - 20
	▶ Activating Groups, Segments, and Elements	3 - 25
	▶ Verifying EDI Delimiters and Adding Frame Help Text	3 - 29
	Modify Form Components	3 - 32
	▶ Promoting and Changing the Maximum Use of Segments and Groups	3 - 32
	▶ Modifying the Maximum Use of the REF Segment	3 - 33
	▶ Modifying the Maximum Use of the N3 Segment	3 - 35
	▶ Promoting the N1 Group	3 - 36
	▶ Changing the Maximum Use of the ITD Segment	3 - 37
	▶ Changing the Maximum Use of the DTM Segment	3 - 39
	▶ Changing the Maximum Use of the PID Group	3 - 40
	▶ Changing the Maximum Use of the DTM:2 Segment	3 - 42
	▶ Changing the Maximum Use of the CAD Segment	3 - 43
	▶ Generating the Form	3 - 44
	Customize the EDI Data	3 - 47
	▶ Overview	3 - 47
	▶ Customizing the BIG Segment	3 - 49
	▶ Customizing the REF Segment	3 - 55
	▶ Customizing the N1 Groups	3 - 58
	▶ Customizing the N1:3 Segment	3 - 59
	▶ Customizing the N3:3 Segment	3 - 63

Overview

Introduction

-
- In this chapter** This chapter includes the following topics associated with creating a screen entry form:
- Form analysis
 - Creating, saving, and setting up a new form
 - Customizing the form, including the groups, segments, and elements
 - Formatting the form, including fields and field labels
 - Finalizing the form.

Note

Press **F1** from any area of the system to access the online Help for that function. The online Help system contains field definitions and other detailed information.

-
- Purpose of this tutorial** This tutorial explains how to customize and format a form before it is compiled into a translation object. The form that you create is a **source form**. When that source form is compiled, the result is a **compiled translation object**. You must register the translation object with Sterling Gentran:Server to be able to use the translation object (to enter EDI data in messages of that type).

-
- Form criteria** Sterling Gentran:Server generates a basic form based on the following criteria you specify:
- Type of form (e.g. screen entry or print)
 - Standard agency (e.g. TRADACOMS, EDIFACT)
 - Standard version (e.g. ANA001, 92.1)
 - Message type (e.g. ORDERS, INVOIC)
 - Release (message version) (e.g. 9)

-
- Mandatory components** All mandatory groups, segments, composites, and elements for the standard, version, and message you specify are available for use (activated) when Sterling Gentran:Server creates a form. Only these mandatory form components (groups, segments, composites, and elements) are activated automatically. You must activate additional form components that you want to be displayed in the screen entry form, and then customize and format the form so that it is appropriate and useful for your company's needs.
-

Before you begin

Before you begin to customize a screen entry form, you should be familiar with the following elements of form design:

- EDI standards (how EDI standards work and how the information your users need is translated to and from the standards)
- Your users (the individuals who will be using the screen entry forms to enter EDI data)
- Your trading partners (the organisations receiving the EDI data that your users enter in the screen entry form)

You can create a different screen entry form for each combination of message, trading partner, and standard version. There is no limit to the number of screen entry forms you can create, and the number of screen entry forms you create is not affected by the number of print forms you create.

Recommendation

We recommend that you mock up a layout of the screen entry form the way you ultimately want it to look. As you are designing the layout, you should take into consideration the people who will be using the translation object. Make sure that the form makes sense to the people who will be using it. By analyzing your company's needs before you actually create the screen entry form, you will reduce the amount of time spent later on redesigning or reformatting the form.

Phases of Form Design

Overview This table lists the phases of form design.

Phase	Description
1	Analyze the EDI file.
2	Design and create the form.
3	Modify form components.
4	Customize the EDI data.
5	Format the form.
6	Finalize the translation object.

Getting Started

Overview

This tutorial is meant to be completed in its entirety. We strongly recommend that you complete each task sequentially. The purpose of completing each task in this tutorial in sequential order, as if it were your own scenario, is not only to teach you how to perform the individual tasks, but also to teach you a logical approach and methods that should be used when you create your own form.

This section guides you in completing the steps in the first phase of form design. In this section, you will create a new screen entry form based on a scenario we have defined for you. This section includes the basics of creating the form, such as defining the scenario and analyzing the purpose of the form, creating and saving the form, and setting up the form. Later in this chapter, you can find techniques for customizing the segments, elements, and groups in the form, as well as for formatting the organization and appearance of the form.

Screen entry form scenario

For this tutorial, you will create a screen entry form for the INVOIC message (invoice), using the TRADACOMS ANA001 release 9 standard. The steps involved in creating this form are broken down into manageable pieces so that you can learn the tasks and procedures involved in creating a screen entry form. Then, you can apply the knowledge gained from using this tutorial to create your screen entry forms.

In this scenario, your company is MWT Manufacturing Co., which manufactures a wide variety of pet supplies for pet stores. One of your trading partners, Pet Zone (a large pet supply retailer), orders products from your company. Your company then invoices Pet Zone for those products. You will create a form that your data entry users will use to enter EDI data for the invoice that you will send to Pet Zone. From discussions with Pet Zone, you know the requirements for the invoices that they receive from you. In this tutorial, you will invoice one order per message only. You will not use settlement discounts.

Analyze the EDI File

Basic Tasks

Introduction

To analyze the EDI file, first you must determine what data you need to send your trading partner and what data your trading partner expects to receive. It is important to analyze the data in this way so that the invoice will contain all the necessary information, and so that your company can bill your partner correctly for the order you shipped to them. You and your partner must agree on which standard, version, message, and release you will be using. In this tutorial, you are using a TRADACOMS ANA001 INVOIC release 9 invoice. It is important to know the information your partner expects you to send in the invoice, and what data will be contained in each element used.

It is very helpful to review the EDI standard that you will use before analyzing the EDI file. We recommend that you obtain an EDI standard manual for the standard and version that you will use. Standard manuals are available from EDI standard agencies.

After discussing with your partner what you will send, determining which segments and elements your partner requires, and reviewing the EDI standard, you can list the items that you will need to use (activate). When Sterling Gentran:Server generates the EDI file format, the system includes all the groups, segments, composites, and elements that are defined by the standard agency for the version of the message you selected. The system activates all the groups, segments, composites, and elements that are defined as mandatory (must be present) by the standard. The system does not enable you to deactivate mandatory groups, segments, composites, and elements.

Form analysis

The first step in creating a form is the analysis of the form requirements. If the analysis you perform is complete, you will have all the information you need to create the form in an efficient and logical manner. If you omit this critical step and proceed directly to creating the form, it is likely that creating the form will be a much longer and arduous task, and the form may not work the way you need it to, due to oversights and omissions.

Creating a screen entry form for the TRADACOMS INVOIC message requires several steps. Some steps are performed at the message level (such as activating form components), and others are iterative steps that are performed for each group, segment, or element in the form. In this analysis phase, you must determine what EDI data you will send Pet Zone, as well as what information Pet Zone requires to process the invoice. The fields on the form must account for all information that you expect to send to Pet Zone.

Mandatory components

This table lists the groups, segments, composites, and elements that have been defined as mandatory by the standards committee for a TRADACOMS ANA001 INVOIC release 9 invoice, and are activated automatically when you create a new form.

Group	Group	Segment	Composite	Element	Description
		CLO			Customer's Location
			CLOC		
		IRF			Invoice References
				INVN	Invoice Number
				IVDT	Date of Invoice
				TXDT	Tax-Point Date
ODD					
	ILD				
		STL			VAT Rate Invoice Sub Trailer
				SEQA:7	First Level Sequence Number
				CD12:2	VAT Rate Category Code
				VATP:2	VAT Rate Percentage
				NRIL	Number of Item Lines
				LVLA	Lines Sub-Total (Excluding VAT)
				EVLA	Extended Sub-Total Amount (Excluding VAT)
				ASDA	Extended Sub-Total Amount (After Settlement Discount Has Been Applied)
				VATA	VAT Amount Payable
				APSI	Payable Sub-Total Amount Including Settlement Discount

(Contd) Group	Group	Segment	Composite	Element	Description
		TLR			Invoice Trailer
				NSTL	Number of Total Segments
				LVLT	Lines Total Amount (Excluding VAT)
				EVLТ	Total Extended Amount Ex Settlement Discount
				ASDT	Total Amount Exc VAT Inc Sett
				TVAT	Total VAT Amount Payable
				TPSI	Total Payable Inc Settlement

Required components

When translating data, the system does not process groups, segments, composites, and elements that are not activated. Therefore, *you* must make available (activate) the groups, segments, composites, and elements that are not defined as mandatory by the standard, but that you have determined that you need to use in the form.

For this tutorial, the form components that are required (need to be activated) and are not mandatory for the standard are the following:

Note

When you activate a conditional group, segment, or composite, the mandatory subordinate segments, composites, and elements are activated automatically. A conditional group, segment, or composite is used only if there is EDI data available for an element contained in it.

Element	Description	Data Type	Length	Constant, Code Value, or Format to Be Assigned
Customer's Location (CLO Segment) (Already Activated)				
CLO CLOC CLO0	Customer's ANA Location Code	String	13	Format = 9
CLO CLOC CLO1	Customer's Own Location Code	String	17	
CLO CNAM	Customer's Name	String	40	
CLO CADD CAD0	Customer's Address Line 1	String	35	
CLO CADD CAD1	Customer's Address Line 2	String	35	

Element	Description	Data Type	Length	Constant, Code Value, or Format to Be Assigned
CLO CADD CAD2	Customer's Address Line 3	String	35	
CLO CADD CAD3	Customer's Address Line 4	String	35	
CLO CADD CAD4	Customer's Post Code	String	8	
Settlement Terms (PYT Segment)				
PYT PAYT	Terms of Payment	String	40	
Data Narrative (DNA Segment)				
DNA GNAR GNA0	General Narrative Line 1	String	40	
DNA GNAR GNA1	General Narrative Line 2	String	40	
DNA GNAR GNA2	General Narrative Line 3	String	40	
DNA GNAR GNA3	General Narrative Line 4	String	40	
Order and Delivery Terms (ODD Group) (Already Activated)				
Order and Delivery Terms (ODD:2 Segment)				
ODD:2 ORNO ORN0	Customer's Order Number	String	17	
ODD:2 ORNO ORN2	Date Order Placed by Customer	Dt/Tm	6	Screen Format = DD/MM/YY
ODD:2 DELN DEL0	Delivery Note Number	String	17	
ODD:2 DELN DEL1	Date of Despatch by Supplier	Dt/Tm	6	Screen Format = DD/MM/YY
Invoice Line Details (ILD Group in ODD Group) (Already Activated)				
Invoice Line Details (ILD:2 Segment)				
ILD:2 SPRO SPR0	EAN-13 Code for the Traded Unit	String	13	
ILD:2 SPRO SPR1	Supplier's Code for the Traded Unit	String	30	
ILD:2 CPRO CPR1	Customer's Item Code	String	30	

Element	Description	Data Type	Length	Constant, Code Value, or Format to Be Assigned
ILD:2 QTYI QTY0	Number of Order Units Invoice	String	15	Format = N0 (Number data type)
ILD:2 QTYI CD04:2	Measure Indicator	String	6	Any valid code
ILD:2 TDES TDE0	Traded Unit Descr. Line 1	String	40	

Segment analysis

For each segment activated (either mandatory or optional), you must ask the following questions:

- Will the segment have a maximum use greater than one?
- What composites and elements need to be activated for the segment?

This table describes the segment components used in this tutorial.

Component	Description
Group	Contains related segments and/or groups that repeat in sequence until either the group data ends or the maximum number of times that the loop is allowed to repeat is exhausted.
Repeating segment	Consists of elements that repeat (in sequence) until the segment data ends or the maximum number of times the segment is allowed to repeat is exhausted.
Composite	Contains two or more component data elements or subelements. Composites are defined by the EDI standards that use them (EDIFACT, TRADACOMS, and certain ANSI X12 standards).
Maximum use	Refers to the number of times that a segment can be used within the structure in which the segment is defined. For example, if a segment can be used only once within a group, but the group can be used multiple times, the segment still has a maximum use of one within each occurrence of the group. The standard defines the maximum number of times a segment can be used, but you must determine how many times a segment will be used, based on what you will be sending your trading partner.
Elements	Each segment contains elements. Some elements are mandatory and others are optional to the standard but necessary for your needs. You must define all the elements that you will be sending Pet Zone for each segment.

Customisation tasks

Sterling Gentran:Server generates a form based on the groups, segments, composites, and elements you activate. At this point, the form is compliant with the standard and it contains all the necessary components based on the data you will send Pet Zone. However, you need to customize the form components to produce a form that is easy to use to enter data in a logical manner.

This table lists the required customisation tasks described in this tutorial.

Form Component	Description	Customisation Task
INVOIC file	Invoice Details	Use an extended rule to calculate the VAT summary for the fields in the STL and TLR segments.
CLO CLOC CLO0 element	Customer's ANA Location Code	Your users will enter the ANA code for the customer's location to which the invoiced items are to be shipped as a string data type accepting numeric characters only. Therefore, you will designate the appropriate string format for this element. Also, you will change the field label to "Location ANA Code."
CLO CLOC CLO1 element	Customer's Own Location Code	Your users will enter a string no longer than ten characters in this element, so you will change the maximum length for this element to ten. Also, you will change the field label to "Location Own Code."
CLO CNAM element	Customer's Name	Your users will enter a string no longer than thirty-five characters in this element, so you will change the maximum length for this element to thirty-five. Also, you will shorten the field label to "Name."
CLO CADD CAD0 element	Customer's Address Line 1	You will shorten the field label for this element to "Address Line 1."
CLO CADD CAD1 element	Customer's Address Line 2	You will shorten the field label for this element to "Address Line 2."
CLO CADD CAD2 element	Customer's Address Line 3	You will shorten the field label for this element to "Address Line 3."
CLO CADD CAD3 element	Customer's Address Line 4	You will shorten the field label for this element to "Address Line 4."
CLO CADD CAD4 element	Customer's Post Code	You will shorten the field label for this element to "Post Code."

(Contd) Form Component	Description	Customisation Task
IRF segment	Invoice References	You and your trading partner will use this segment only once, so you will change the maximum use of this segment to one.
IRF INVN element	Invoice Number	You will shorten the field label for this element to “Invoice No.” In addition, you will set up the document name (which enables you to differentiate between messages in the document browsers in Sterling Gentran:Server) for this element.
IRF IVDT element	Date of Invoice	Your users will enter the invoice date in DD/MM/YY format (not YYMMDD format, the default format defined by the standard). Therefore, you will change the screen format accordingly. You will change the maximum length for this field and element to eight (to accommodate the longer date format). In addition, you will change the field label to “Invoice Date.”
IRF TXDT element	Tax-Point Date	Your users will enter the tax-point date in DD/MM/YY format (not YYMMDD format, the default format defined by the standard). Therefore, you will change the screen format accordingly. You will change the maximum length for this field and element to eight (to accommodate the longer date format).
PYT segment	Settlement Terms	You and your trading partner will use this segment only once, so you will change the maximum use of this segment to one.
PYT SEQA element	First Level Sequence Number	This element is required in the invoice, but is not meaningful for your purposes. You will prevent this field from being displayed in the screen entry translation object. Also, you will define a constant value for this field, as this field will always have the same value (because each invoice corresponds to only one purchase order).
PYT PAYT element	Terms of Payment	You will shorten the field label for this element to “Payment Terms.”
DNA segment	Data Narrative	You and your trading partner will use this segment only once, so you will change the maximum use of this segment to one.

(Contd) Form Component	Description	Customisation Task
DNA SEQA:2 element	First Level Sequence Number	This element is required in the invoice, but is not meaningful for your purposes. You will prevent this field from being displayed in the screen entry translation object. Also, you will define a constant value for this field, as this field will always have the same value (because each invoice corresponds to only one purchase order).
DNA GNAR GNA0 element	General Narrative Line 1	You will shorten the field label for this element to "Invoice Notes."
DNA GNAR GNA1 element	General Narrative Line 2	The data in this element will be self-explanatory, so you will remove the label from this field.
DNA GNAR GNA2 element	General Narrative Line 3	The data in this element will be self-explanatory, so you will remove the label from this field.
DNA GNAR GNA3 element	General Narrative Line 4	The data in this element will be self-explanatory, so you will remove the label from this field.
ODD group	Order and Delivery Terms	You and your trading partner will use this group only once, so you will change the maximum use of this group to one. You will promote this group so that the fields in this group are placed on the main Invoice Details frame.
ODD:2 SEQA element	First Level Sequence Number	This element is required in the invoice, but is not meaningful for your purposes. You will prevent this field from being displayed in the screen entry translation object. Also, you will define a constant value for this field, as this field will always have the same value (because each invoice corresponds to only one purchase order).
ODD:2 ORNO ORN0 element	Customer's Order Number	You will change the field label for this element to "Customer's P.O. No."

(Contd) Form Component	Description	Customisation Task
ODD:2 ORNO ORN2 element	Date Order Placed by Customer	Your users will enter the purchase order date in DD/MM/YY format (not YYMMDD format, the default format defined by the standard). Therefore, you will change the screen format accordingly. You will change the maximum length for this field and element to eight (to accommodate the longer date format). In addition, you will shorten the field label to “P.O. Date.”
ODD:2 DELN DEL0 element	Delivery Note Number	You will add Help text to this field.
ODD:2 DELN DEL1 element	Date of Despatch by Supplier	Your users will enter the delivery date in DD/MM/YY format (not YYMMDD format, the default format defined by the standard). Therefore, you will change the screen format accordingly. You will change the maximum length for this field and element to eight (to accommodate the longer date format). In addition, you will shorten the field label to “Delivery Date.”
ILD group in the ODD group	Invoice Line Details	You will add the more descriptive title “Line Items” to the group description to label the fields contained on the ILD:2 frame. In addition, you will use an extended rule to calculate the extended line cost for the line items, and to convert the VAT rate percentage from a string (its data type in the partner database) to a number (the data type required in the VAT Rate Percentage element).
ILD:2 SEQA element	First Level Sequence Number	This element is required in the invoice, but is not meaningful for your purposes. You will prevent this field from being displayed in the screen entry translation object. Also, you will define a constant value for this field, as this field will always have the same value (because each invoice corresponds to only one purchase order)

(Contd) Form Component	Description	Customisation Task
ILD:2 SEQB element	2nd Level Sequence No.	You will use the Loop Count standard rule to count the number of this iteration of the group in this field (to provide a count of the number of line items in the invoice). You will instruct the system to display the value from this field in the first column in the Line Items list box on the Invoice Details frame. Also, the line item number will be no longer than five digits, so you will change the maximum length for this element to five. In addition, you will shorten the field label to "Item No." and make the field display-only (as the users will not need to enter a value in this field).
ILD:2 SPRO SPR0 element	EAN-13 Code for the Traded Unit	You will shorten the field label for this element to "EAN Code."
ILD:2 SPRO SPR1 element	Supplier's Code for the Traded Unit	You will instruct the system to display the value from this field in the second column in the Line Items list box on the Invoice Details frame. Also, you will change the field label to "Supplier's Product Code."
ILD:2 CPRO CPR1 element	Customer's Item Code	You will change the field label for this element to "Customer's Product Code."
ILD:2 QTYI QTY0 element	Number of Order Units Invoice	Your users will enter the quantity as a number with N0 format (formatted with an implicit decimal point and no decimal places). Therefore, you will change the data type from String to Number and the screen and EDI formats to N0 formats. You will instruct the system to display the value from this field in the third column in the Line Items list box on the Invoice Details frame. Also, the quantity will be no longer than five digits, so you will change the maximum length for this element to five. In addition, you will shorten the field label to "Quantity."
ILD:2 QTYI CD04:2 element	Measure Indicator	Your users can enter any of the measure indicator codes that the standard designates as valid codes. You will load the entire code list for this element, which will create a drop-down list box containing valid codes from which users can select. Also, you will change the field label to "Unit of Measure."

(Contd) Form Component	Description	Customisation Task
ILD:2 AUCT AUC0 element	Cost Price (Excluding VAT)	Your users will enter the unit price in R4 format (formatted with an explicit decimal point and up to four decimal places). Therefore, you will change the screen format to R4. You will instruct the system to display the value from this field in the fourth column in the Line Items list box on the Invoice Details frame. Also, you will change the field label to “Unit Price (Ex. VAT).”
ILD:2 LEXC element	Extended Line Cost (Excluding VAT)	The extended line cost will be formatted as an R4 number (formatted with an explicit decimal point and up to four decimal places). Therefore, you will change the screen format to R4. In addition, you will prevent this field from being displayed in the screen entry translation object, as users will not need to enter or view a value in this field.
ILD:2 CD12 element	VAT Rate Category Code	You will use a Select standard rule so that all of the available codes from the VAT rate category code table (VATCODES table) will be available in a drop-down list box for your screen entry translation object users. Also, you will shorten the field label to “VAT Code.”
ILD:2 VATP element	VAT Rate Percentage	You will create a temporary storage field for the VAT rate (with a string data type, to accommodate the VAT rate from the partner database). The extended rule you used on the ILD group will convert the string data in the temporary storage field to a number, then place the number in the ILD:2 VATP element (which has a number data type) and delete the value from the temporary field. You will prevent the ILD:2 VATP field from being displayed on the screen entry translation object.
ILD:2 TDES TDE0 element	Traded Unit Descr. Line 1	You will shorten the field label for this element to “Description.”
STL segment	VAT Rate Invoice Sub Trailer	You will add the more descriptive title “VAT Summary” to the group description to label the fields contained on the STL frame.

(Contd) Form Component	Description	Customisation Task
STL SEQA:7 element	First Level Sequence Number	This element is required in the invoice, but screen entry translation object users will not need to enter a value in this field (this field will be assigned a value in an extended rule used on the INVOIC file). You will prevent this field from being displayed in the screen entry translation object.
STL CD12:2 element	VAT Rate Category Code	You will instruct the system to display the value from this field in the first column in the VAT Summary list box on the Invoice Details frame. Also, you will shorten the field label to “VAT Code” and make the field display-only (as users will not need to enter a value in this field).
STL VATP:2 element	VAT Rate Percentage	The VAT rate will be displayed in the screen entry translation object in R3 format (formatted with an explicit decimal point and up to three decimal places). Therefore, you will change the screen format to R3. You will instruct the system to display the value from this field in the second column in the VAT Summary list box on the Invoice Details frame. Also, you will shorten the field label to “VAT rate” and make the field display-only (as users will not need to enter a value in this field).
STL NRIL element	Number of Item Lines	This field will be assigned a value in an extended rule (used on the INVOIC file). You will change the field label to “Number of Line Items” and make the field display-only (as users will not need to enter a value in this field).
STL LVLA element	Lines Sub-Total (Excluding VAT)	The lines subtotal will be displayed in the screen entry translation object in R2 format (formatted with an explicit decimal point and up to two decimal places). Therefore, you will change the screen format to R2. You will instruct the system to display the value from this field in the third column in the VAT Summary list box on the Invoice Details frame. Also, you will make this field display-only (as users will not need to enter a value in this field) and make minor changes to the field label.

(Contd) Form Component	Description	Customisation Task
STL EVLA element	Extended Sub-Total Amount (Excluding VAT)	This element is required in the invoice, but is not meaningful for your purposes. You will prevent this field from being displayed in the screen entry translation object (this field will be assigned a value in the extended rule used on the INVOIC file).
STL ASDA element	Extended Sub-Total Amount (After Settlement Discount Has Been Applied)	This element is required in the invoice, but is not meaningful for your purposes. You will prevent this field from being displayed in the screen entry translation object (this field will be assigned a value in the extended rule used on the INVOIC file).
STL VATA element	VAT Amount Payable	The VAT amount payable will be displayed in the screen entry translation object in R2 format (formatted with an explicit decimal point and up to two decimal places). Therefore, you will change the screen format to R2. Also, you will make this field display-only (as users will not need to enter a value in this field).
STL APSI element	Payable Sub-Total Amount Including Settlement Discount	The payable subtotal will be displayed in the screen entry translation object in R3 format (formatted with an explicit decimal point and up to three decimal places). Therefore, you will change the screen format to R3. Also, you will make this field display-only (as users will not need to enter a value in this field) and shorten the field label to “Payable Subtotal (Inc. Sett. Disc.).”
TLR NSTL element	Number of Total Segments	This element is required in the invoice, but is not meaningful for your purposes. You will prevent this field from being displayed in the screen entry translation object (this field will be assigned a value in the extended rule used on the INVOIC file).
TLR LVLV element	Lines Total Amount (Excluding VAT)	The invoice amount (excluding VAT) will be displayed in the screen entry translation object in R2 format (formatted with an explicit decimal point and up to two decimal places). Therefore, you will change the screen format to R2. Also, you will make this field display-only (as users will not need to enter a value in this field).

(Contd) Form Component	Description	Customisation Task
TLR EVLT element	Total Extended Amount Ex Settlement Discount	The invoice amount (excluding settlement discount) will be displayed in the screen entry translation object in R2 format (formatted with an explicit decimal point and up to two decimal places). Therefore, you will change the screen format to R2. Also, you will make this field display-only (as users will not need to enter a value in this field).
TLR ASDT element	Total Amount Exc VAT Inc Sett	The invoice amount (excluding VAT, including settlement discount) will be displayed in the screen entry translation object in R2 format (formatted with an explicit decimal point and up to two decimal places). Therefore, you will change the screen format to R2. Also, you will make this field display-only (as users will not need to enter a value in this field).
TLR TVAT element	Total VAT Amount Payable	The VAT total will be displayed in the screen entry translation object in R2 format (formatted with an explicit decimal point and up to two decimal places). Therefore, you will change the screen format to R2. Also, you will make this field display-only (as users will not need to enter a value in this field).
TLR TPSI element	Total Payable Inc Settlement	The total invoice amount will be displayed in the screen entry translation object in R2 format (formatted with an explicit decimal point and up to two decimal places). Therefore, you will change the screen format to R2. Also, you will make this field display-only (as users will not need to enter a value in this field).

Design and Create the Form

Verifying the Global EDI Date Formats

Introduction Sterling Gentran:Server enables you to customize the global EDI date formats (for all forms). You can specify the default EDI format of dates for both six-character dates and eight-character dates. When you customize the global EDI date formats, the settings are valid for all forms created in the current session of Sterling Gentran:Server. However, you can override the default date formats for an individual element on the Element Properties dialog for that element.

You must verify that you are using the correct global date formats the first time you use Sterling Gentran:Server. Typically, you will verify the global EDI date formats one time only. You can change the default date formats if they do not match the formats you intend to use.

Procedure Use this procedure to verify the global EDI date formats.

Step	Action
1	Select Preferences from the Options menu to display the Preferences dialog. The Preferences dialog is a property sheet that enables you to set global defaults for Sterling Gentran:Server.
2	Verify that the Standard Formats tab displays the default date formats that are used when elements are read from the standards database.
3	Verify that the Six-character dates drop-down list box contains YYMMDD to define the format of the six-character EDI dates in your forms.
4	Verify that the Eight character dates drop-down list box contains YYYYMMDD to define the format of the eight-character EDI dates in your forms.
5	Click OK to accept the default date formats for 6- and 8-character date fields and exit the Preferences dialog. Note To change the order in which the date formats appear in the Six-character dates and Eight character dates drop-down list boxes or to add a new date format to the lists, select Date Formats from the Options menu.

Defining the Type of Form

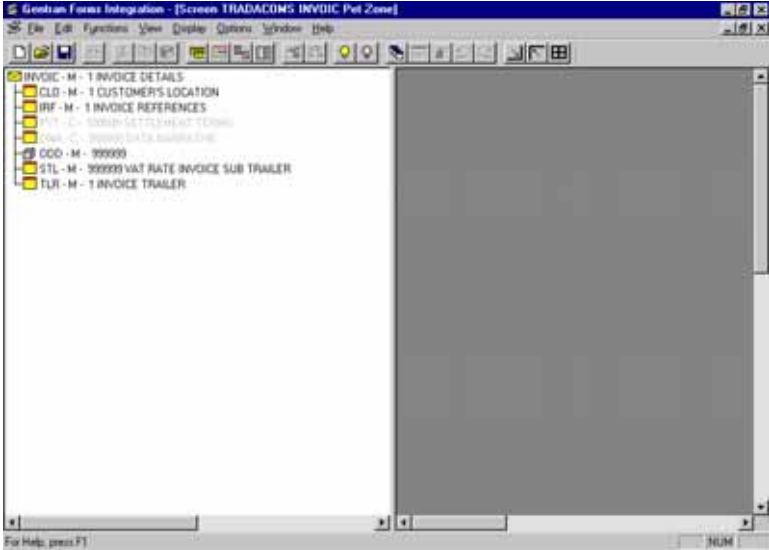
Overview The first task in creating a new form is to define the type of form and EDI standard, version, transaction (message), and release. In this tutorial, you are creating a screen entry form so that your data entry users can enter EDI data in an invoice translation object in Sterling Gentran:Server. Instead of defining the INVOIC message to the system yourself, you want Sterling Gentran:Server to use the standards database on your system to build the invoice according to the TRADACOMS standard.

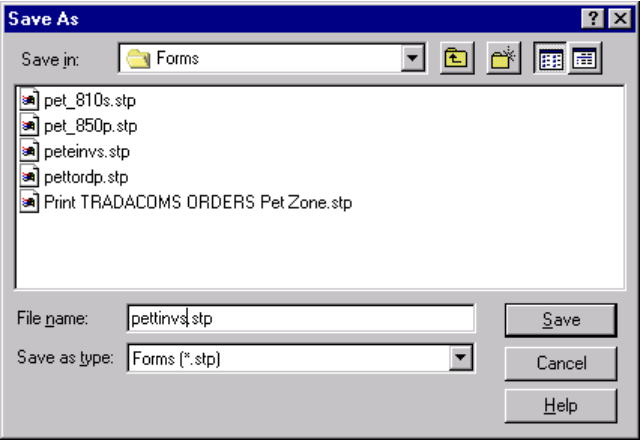
Procedure Use this procedure to create the new screen entry form.

Important

After you create a new form, it is important to define the details of the form and save it. The Save function writes (saves) the currently-selected form to disk.

Step	Action
1	Select New from the File menu to display the New Form Wizard.
2	From the Translation Object Function drop-down list box, accept the default value Screen entry to indicate that the translation object you are creating is a screen entry translation object.
3	From the Data Source drop-down list box, select the ODBC data source that you wish to use.
4	From the Agency drop-down list box, select [A] Tradacoms , which is the EDI standard you will use for this translation object.
5	From the Version drop-down list box, select [ANA001] , which is the version of the standard you will use for this translation object. The versions that are available depend on which standard you selected.
6	From the Transaction drop-down list box, select [INVOIC] INVOICE DETAILS , which is the transaction set (message) you will use for this translation object. The messages that are available depend on which standard and version you selected.
7	From the Release drop-down list box, select 9 , which is the message version you will use for this translation object. The message versions that are available depend on which message (transaction) you selected.

(Contd) Step	Action
8	<p>Click OK to create the EDI file (it may take a few seconds to create the file). The form is displayed as follows:</p> 
9	<p>Select Save from the File menu.</p> <p>System Response The Translation Object Details dialog is displayed.</p> <p>Note If you have performed any function that invalidates the current format of the translation object, the Save function is not available (dimmed) until you regenerate the layout (click Generate Layout on the Main Toolbar).</p>
10	<p>In the Author field, enter your name. This field usually contains the name of the person who created the form.</p>
11	<p>In the Description field, enter Screen TRADACOMS INVOIC Pet Zone. This field is used to provide a brief explanation of the compiled translation object that will enable you to differentiate it from similar translation objects in Sterling Gentran:Server. For example, “Screen TRADACOMS INVOIC Pet Zone” is the description of a screen entry translation object for a TRADACOMS ANA001 invoice (INVOIC) for partner Pet Zone.</p>
12	<p>Verify that Screen entry is selected from the Translation Object Function drop-down list box.</p>
13	<p>In the Major version field, enter 1 to designate the version number for this translation object.</p>

(Contd) Step	Action
14	<p>In the Minor version field, accept the default value 0 that designates the release number for this translation object.</p> <p>Note When you make a major change to this form, increase the version to the next higher sequential number (e.g. 2.0, 3.0). If you make a minor change to the form, increase the release to the next higher sequential number (e.g. 2.1, 2.2).</p>
15	<p>The Input and Output fields (Agency, Version, Transaction, Release, and F Group) contain information only if the Input and/or Output sides of the form are of EDI format. For this tutorial, do <i>not</i> change the information in these fields.</p> <p>Note The system allows you to change the information in the Input and Output fields, but modifying this information does not alter the content of the form. An example of when you might want to alter these fields is when you want the form to reflect a standard version that is not loaded on your system. You can change the version on this dialog, and then physically alter the form to be compliant with that version.</p>
16	<p>Click OK to save the translation object details and access the Save As dialog.</p> 
17	<p>Verify that the Save in drop-down list box reflects the drive\folder where Sterling Gentran:Server is installed. The default is GENSRVNT\Forms. If the selected drive is not the correct one, select the appropriate drive.</p>

(Contd) Step	Action
18	<p>In the File name field, enter pettinvs.stp to replace the default file name. You allocate a filename to a form when you save the form for the first time or use the Save As function to save a copy of the form under a different name. The name of the form must be one to eight unique characters that define the form in a meaningful way. For example, “PETTINVS” is the name of a screen entry form for a TRADACOMS invoice message (INVOIC) for partner Pet Zone.</p> <p>The default file extension for forms is .STP. Using this extension distinguishes source form files from other types of files, such as compiled translation objects. The naming conventions in the Sterling Gentran:Server Forms Integration subsystem are as follows:</p> <ul style="list-style-type: none"> ▶ The source form (form created in Sterling Gentran:Server) should be named using the file extension .STP (e.g. PETTINVS.STP). ▶ The compiled translation object (translation object that is the result of compiling the source form) should be named using the same filename that was allocated to the source form, but with the file extension .TPL (e.g. PETTINVS.TPL). <p>Recommendation We recommend that you use these naming conventions to distinguish source forms and compiled translation objects from other types of files. We also recommend that you use the same filename (different file extension) for a source form and the translation object that was compiled from it.</p>
19	Click Save to save the form.

Recommendation

We recommend that you save the form as often as possible, to mitigate the possible loss of additions or modifications in the event of a hardware or system error.

Activating Groups, Segments, Composites, and Elements

Overview When Sterling Gentran:Server generates the form, the system includes all the groups, segments, composites, and elements that are defined by the standard agency (TRADACOMS) for the version (ANA001), message (INVOIC), and release (9) you selected. The system activates all the groups, segments, composites, and elements that are defined as mandatory (must be present) by the standard. The system does not enable you to deactivate the mandatory groups, segments, and elements.

Example In the example below, the INVOIC group, CLO segment, and CLO CLOC composite are mandatory for the invoice. You do not need to activate these components. The CLO CLOC CLO0, CLO CLOC CLO1, and CLO CLOC CLO2 elements are not mandatory, so they are dimmed on the form. To view the segments, composites, and elements in a group, segment, or composite on your form, double-click the form component in the EDI File Format Window (left side of the Forms main window). To activate an inactive form component, click Activate on the Main Toolbar, then click the form component. The component is no longer dimmed.



When translating data, the system does not process groups, segments, composites, and elements that are not activated. Therefore, *you* must activate the groups, segments, composites, and elements that are not defined as mandatory by the standard, but that you have determined that you need to use in the form.

Groups, segments, composites, and elements used in this tutorial

This table lists the groups, segments, composites, and elements to be used in this tutorial.

Group	Group	Segment	Composite	Element	
		CLO (already activated)	CLOC (already activated)	CLO0	
				CLO1	
				CNAM	
			CADD	CAD0	
				CAD1	
				CAD2	
		CAD3			
			CAD4		
		PYT		PAYT	
		DNA	GNAR	GNA0	
				GNA1	
				GNA2	
				GNA3	
ODD (already activated)		ODD:2	ORNO (mandatory for ODD:2)	ORN0	
				ORN2	
		DELN (mandatory for ODD:2)	DEL0		
			DEL1		
		ILD (already activated)	ILD:2	SPRO (mandatory for ILD:2)	SPR0
					SPR1
	CPRO			CPR1	
	QTYI (mandatory for ILD:2)			QTY0	
		CD04:2			
		TDES	TDE0		

Procedure Use this procedure to activate the required groups, segments, composites, and elements.

Step	Action
1	<p>Double-click the groups, segments, and composites listed in the table below to open them. This table lists all the segments, composites, and elements that you need to activate. Opening all the necessary groups, segments, and composites before you start to activate enables you to scroll down the form and activate the segments, composites, and elements sequentially.</p> <p>Note When you activate a conditional group, segment, or composite, the mandatory subordinate segments, composites, and elements are activated automatically.</p>
2	Click Activate on the Main Toolbar.
3	<p>Click each inactive segment that you need to use. Clicking these segments will activate the segments.</p> <p>Note If you accidentally click a segment that you did not mean to activate, click the segment with the right mouse button to access the shortcut menu. Select Deactivate from the shortcut menu.</p>
4	<p>Click each inactive composite that you need to use. Clicking these composites will activate the composites.</p> <p>Note If you accidentally click a composite that you did not mean to activate, click the composite with the right mouse button to access the shortcut menu. Select Deactivate from the shortcut menu.</p>
5	<p>Click each inactive element that you need to use. Clicking these elements will activate the elements. When you activate an element in a screen entry form, either the tag “Edit Box” or the tag “Drop Down” is displayed before that element’s description. “Edit Box” indicates that the element is formatted as a field. “Drop Down” indicates that the element is formatted as a drop-down list box because you applied a standard rule that allows a selection of multiple items.</p> <p>Note If you accidentally click an element that you did not mean to activate, click the element with the right mouse button to access the shortcut menu. Select Deactivate from the shortcut menu.</p>
6	Click Activate on the Main Toolbar to turn activation mode off.

Verifying EDI Delimiters and Adding Frame Help Text

Overview

You are using an EDI standard that contains composite elements, so you must verify that Sterling Gentran:Server is specifying the correct delimiters. Delimiters are flags that you define to the system as separating specific EDI components. Delimiters are necessary for all variable field-length standards, because the data is compressed (and the leading zeroes and trailing blanks are removed). The fields vary in length, so the system needs a flag to determine where one element ends and another begins. For example, an element delimiter marks the beginning of a new element.

Important

Although verifying EDI delimiters in Sterling Gentran:Server is mandatory *only* if you are using a standard with composite elements or subelements, we recommend that you perform this task regardless of which standard you use.

In addition, you will add frame Help text so screen entry translation object users can access online Help for the Invoice Details frame.

EDI delimiters table

This table lists the valid EDI delimiters.

Field	TRADACOMS Default Character	TRADACOMS Default Hex Value
Tag Delimiter	= (equal sign)	0x3D
Segment Delimiter	' (apostrophe)	0x27
Element Delimiter	+ (plus sign)	0x2B
Sub Element Delimiter	: (colon)	0x3A
Decimal Separator	. (full stop)	0x2E
Release Character	? (question mark)	0x3F

Procedure Use this procedure to verify EDI delimiters and add frame Help text.

Step	Action
1	Right-click the Invoice file icon and select Properties from the shortcut menu to display the File Format Properties dialog.
2	Select the Display tab.
3	<p>In the Frame Help Text list box, enter the following text (press Enter at the end of each line of text below):</p> <p>This frame contains information pertaining to the entire invoice message (INVOIC). For online Help on an individual field on this frame, select the field and press F1.</p> <p>Note Pressing Enter creates line breaks for the online Help that the screen entry translation object users in Sterling Gentran:Server view when they press F1. If you do not create line breaks, the online Help will be displayed on one line of text in the online Help pop-up window (the text will not wrap to the next line), and text that extends beyond the width of the user's monitor will not be displayed.</p> <p>When you generate the form (display the fields in the Layout Window), there is one frame in the Layout Window (right side of Forms main window) for every group and repeating segment in the EDI File Format Window (left side of Forms main window). Entering frame Help text for the group or segment corresponding to each frame enables screen entry translation object users to access context-sensitive Help text for the frame.</p>
4	Select the Delimiters tab to access the Delimiters dialog.
5	<p>Verify that the correct delimiters are being used for the TRADACOMS standard. If the delimiters differ from the default values listed in the previous table, you can enter either the character or the hexadecimal value in the correct field.</p> <p>Note If you use the default hex value, the value <i>must</i> begin with "0x" (the number zero and the letter "x").</p> <p>The Stream segments check box on the Delimiters dialog currently is not marked. For this tutorial, do not mark this check box, so the translator will continue to insert a carriage return after every segment. If the Stream segments check box is marked, then a carriage return is <i>not</i> used after every segment, and the segments are "streamed."</p>
6	Click OK to save the delimiters and exit the Delimiters dialog.

Modify Form Components

Changing the Maximum Use of Segments and Groups

Introduction

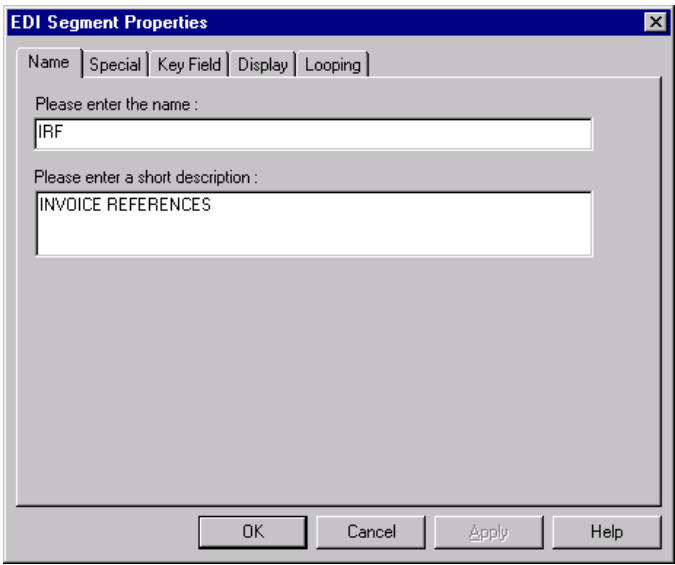
Changing the maximum use of a segment or group changes the maximum number of times the segment or group can be used. A segment or group with a maximum use greater than one repeats (loops), and is placed on a separate frame than the segment or group to which it is subordinate. A segment or group with a maximum use of one does not repeat, and its fields are displayed on the same frame as the group to which it is subordinate.

In this tutorial, you will change the maximum use of the groups and segments before you generate the form (display the fields in the Layout Window). By customizing the group and segment properties first, all fields are placed on their appropriate frames the first time you generate the form. If you change the maximum use of the groups and segments *after* you generate the form, the fields will be placed on several more frames than will be present ultimately in the form. Therefore, changing the group and segment properties before you first generate the form enables the fields to be placed on as few frames as necessary.

Changing the Maximum Use of the IRF Segment

Overview The IRF segment contains the Invoice References for the invoice. In this tutorial, the IRF segment will be used for the invoice number, invoice date, and tax-point date. The standard allows the IRF segment to be used up to 999,999 times in one invoice. In this tutorial, you will use the IRF segment only once per invoice. You will change the maximum use of the IRF segment to one, which will place the associated fields on the main Invoice Details frame with the majority of the invoice fields.

Procedure Use this procedure to change the maximum use of the IRF segment.

Step	Action
1	Click the IRF segment with the right mouse button to access the shortcut menu.
2	<p>Select Properties from the shortcut menu.</p> <p>System Response The EDI Segment Properties dialog is displayed.</p> 
3	Select the Looping tab.
4	In the Max Usage field, enter 1 to designate that this segment can be used only once per invoice.
5	Click OK to exit the EDI Segment Properties dialog.

Changing the Maximum Use of the PYT Segment

Overview The PYT segment contains the Settlement Terms for the invoice. In this tutorial, the PYT segment will be used for the describing the terms of payment. The standard allows the PYT segment to be used up to 999,999 times in one invoice. In this tutorial, you will use the PYT segment only once per invoice. You will change the maximum use of the PYT segment to one, which will place the associated fields on the main Invoice Details frame with the majority of the invoice fields.

Procedure Use this procedure to change the maximum use of the PYT segment.

Step	Action
1	Right-click the PYT segment to access the shortcut menu.
2	Select Properties from the shortcut menu. System Response The EDI Segment Properties dialog is displayed.
3	Select the Looping tab.
4	In the Max Usage field, enter 1 to designate that this segment can be used only once per invoice.
5	Click OK to exit the EDI Segment Properties dialog.

Changing the Maximum Use of the DNA Segment

Overview The DNA segment contains the Data Narrative for the invoice. In this tutorial, the DNA segment will be used for narrative (descriptive text) describing information that cannot be sent in a coded form. The standard allows the DNA segment to be used up to 999,999 times in one invoice. In this tutorial, you will use the DNA segment only once per invoice. You will change the maximum use of the DNA segment to one, which will place the associated fields on the main Invoice Details frame with the majority of the invoice fields.

Procedure Use this procedure to change the maximum use of the DNA segment.

Step	Action
1	Click the DNA segment with the right mouse button to access the shortcut menu.
2	Select Properties from the shortcut menu. System Response The Segment Properties dialog is displayed.
3	Select the Looping tab.
4	In the Max Usage field, enter 1 to designate that this segment can be used only once per invoice.
5	Click OK to exit the Segment Properties dialog.

Changing the Maximum Use of the ODD Group

Overview The ODD group contains the Order and Delivery Terms information for the invoice. In this tutorial, the ODD group will be used for information about the customer's order number, the date the order was placed, and the delivery number and date. The standard allows the ODD group to be used up to 999,999 times per invoice (because you are addressing only one order with this invoice). In this tutorial, you will use the ODD group only once per invoice. You will change the maximum use of the ODD group to one, which will place the associated fields on the main Invoice Details frame with the majority of the invoice fields.

Procedure Use this procedure to change the maximum use of the ODD group.

Step	Action
1	Click the ODD group with the right mouse button and select Properties from the shortcut menu. System Response The Group Properties dialog is displayed.
2	Select the Looping tab.
3	In the Max Usage field, enter 1 to designate that this group can be used only once per invoice.
4	Select the Display tab.
5	Click the Promote group to parent frame check box to promote this group. The fields in this group will be displayed on the same frame as the fields in the parent group (INVOIC). Note Although this group has a maximum use of one, if you do not mark the Promote group to parent frame check box, then the fields in this group will <i>not</i> be displayed on the same frame in the Layout Window as the fields in the parent group.
6	Click OK to exit the Group Properties dialog.

Generating the Form

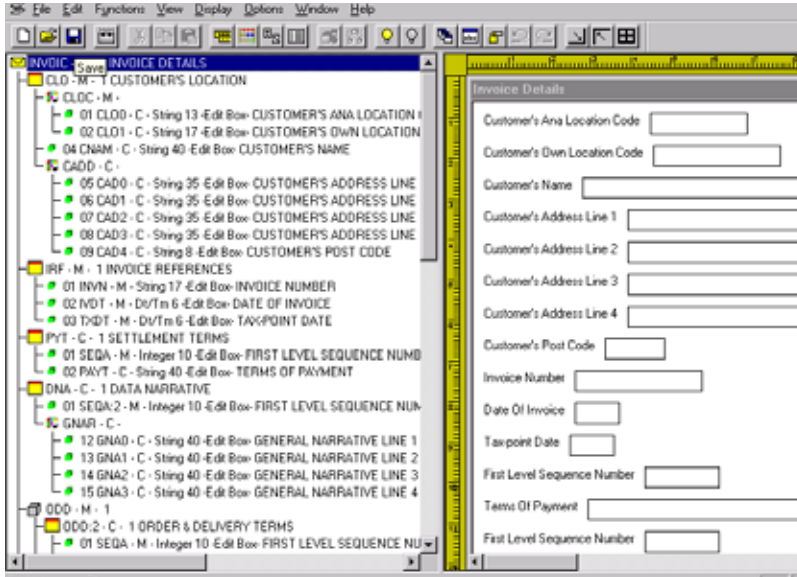
Overview Generating a form is different from compiling a form. When you *compile* a form, the source form is translated into a compiled translation object. When you *generate* a form, the fields of the form are displayed on a frame in the Layout Window (right side of the Forms main window), based on the groups, segments, and elements that are activated.

Note

You can, and should, regenerate (or refresh) the form several times as you customize and format the form to ensure that you are viewing the most recent changes to the Layout Window.

Procedure Use this procedure to generate the print form based on the groups, segments, and elements you activated.

Step	Action
1	Select the INVOIC file icon. Selecting the INVOIC file icon before you generate the layout enables you to view the beginning of the invoice layout in the Layout Window after the layout is generated. However, selecting the INVOIC file icon is not a required prerequisite to generating the layout.

(Contd) Step	Action
2	<p>Click Generate Layout on the Main Toolbar.</p> <p>System Response The layout of the screen entry form will be displayed in the Layout Window.</p>  <p>Note You should regenerate the form periodically as you customize the screen entry form to ensure that the most recent changes to the frame are reflected in the Layout Window.</p>

**After generating
the form**

After you generate the form, there is one field on the right side of your screen (Layout Window) for every activated element on the left side of your screen (EDI File Format Window). You can click either the field or its corresponding element to select it. To access the Element Properties dialog for a field or element, either double-click the element, or use the right mouse button to click the field or element, and then select Properties from the shortcut menu.

Note

When you first generate the form, each field in the Layout Window is labelled with the same name as its corresponding element in the EDI File Format Window. As you customize the form, however, you will change some of the labels and remove others, so all the fields will not be labelled the same as their corresponding elements. Even though you will change or remove some field labels, each field still corresponds to one element.

When the screen entry form is generated, the fields associated with each non-repeating segment or group are displayed on a frame in the Layout Window. If a segment or group is defined as repeating, then a list box is displayed on the parent frame, and the fields for that repeating segment or group are displayed on a separate frame.

All frames in a screen entry form are titled. The default title for each frame is its message, group, or segment name, but you can change the default titles to better identify the information that will be entered.

Customize the EDI Data

Overview

Introduction

You can customize the form, including the properties of each type of form component (group, segment, and element).

Customizing the form is an iterative process. This tutorial guides you through all the steps involved in customizing the form, component by component. When you create forms, you usually will activate the form components you need to use, customize and format the form components, then compile the form and test the translation object (and print a report, if necessary). As you substantially customize the form, you usually will compile and print the form several times to view your changes before the form truly is finalized.

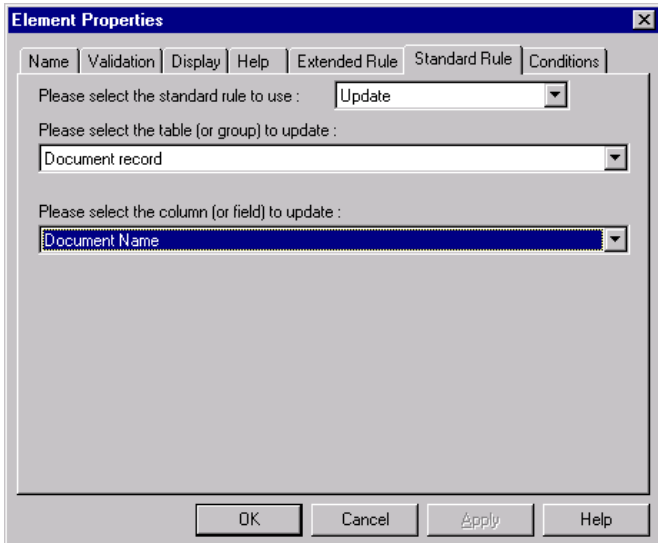
This section explains how to customize the form components for each sequential component in this tutorial.

How to set up the document name

We recommend that you set up a Document Name for each form. The document name makes the identification of a document created by the form easier in Sterling Gentran:Server. Setting up the document name enables you to differentiate between documents in the document browsers in Sterling Gentran:Server. If you set up the document name in the Forms Integration subsystem, the Name field of the document browsers that contain this message in Sterling Gentran:Server will contain the data from that element. You can choose any element as the document name, but we strongly recommend that you select an element that occurs only once in the message and has a data type of string. For a TRADACOMS ANA001 INVOIC release 9 invoice, the document name usually is the Invoice Number.

Use this procedure to set up the document name.

Step	Action
1	<p>Double-click the IRF INVN element.</p> <p>System Response The Element Properties dialog is displayed.</p> <p>Recommendation In this tutorial, we recommend that you select this element because it is a non-recurring and mandatory element, and it will help identify this message meaningfully in Sterling Gentran:Server.</p>
2	Select the Use Standard Rule tab.
3	Select the Update option from the drop-down list.

(Contd) Step	Action
4	From the Table/Group drop-down list box, select Document record to indicate that you are updating the document record in Sterling Gentran:Server.
5	<p>From the Column/Field drop-down list box, select Document Name to indicate that you are updating the Name field (in the Sterling Gentran:Server document browsers that contain this message) with the contents of the IRF INVN element.</p> <p>The dialog now should look like this:</p> 
6	Click OK to set up the document name.

Customizing the CLO Segment

Overview The CLO segment (Customer's Location) contains details about the specific customer location pertaining to this invoice. In this tutorial, the CLO segment contains details relating to the specific Pet Zone store you are invoicing.

Customizing the CLO CLOC CLO0 element The CLO CLOC CLO0 element (Customer's ANA Location Code) contains the code assigned by the Article Numbering Association for the customer's location. In this tutorial, your users will enter the customer's ANA location code (which they will obtain from the purchase order for the invoiced items).

Your trading partner, Pet Zone, uses a string of numbers for the ANA location code, so you will create a syntax token that allows only numbers in the screen and EDI formats of the data. Syntax tokens enable you to designate a "token" that defines ranges of characters and/or numbers that are allowed to be used for a string-type element. The characters defined in the syntax token are used while compliance checking each element to ensure that the data in the element falls within the range of allowed characters.

In addition to creating a syntax token to be used for the screen and EDI formats of the data, you will rename the field label to make it shorter and add Help text to the field.

How to create a syntax token

Use this procedure to create a syntax token.

Step	Action
1	Select Syntax Tokens from the Edit menu to display the Syntax Tokens dialog.
2	The Token column contains the value designated as the syntax token for each existing syntax token. The Token contains a range of characters that, when applied to an element, dictate the way that element must be formatted. If the element is not formatted as specified, the system will generate a compliance error. The Allowed character ranges column contains the range(s) of characters that are permitted for each existing syntax token. Each range consists of a pair of characters that define the start and end characters.
3	Click New to access the Edit Syntax Token dialog.
4	In the Token field, enter 9 to designate the unique one-character alphanumeric value that the system will recognize as containing the allowed range of characters you designate. The Character Ranges list box contains the character range or ranges that you defined for this token. You can define more than one character range for each token.

(Contd) Step	Action
5	Click New to access the Edit Character Range dialog, which enables you to create a character range. Note Sterling Gentran:Server uses the ANSI character set when determining the start-end range.
6	In the Start character field, enter 0 , which is the character that begins the allowed token range.
7	In the End character field, enter 9 , which is the character that terminates the allowed token range.
8	Click OK to exit the Edit Character Range dialog.
9	Click OK to save the syntax token and exit the Edit Syntax Token dialog.
10	Click Close to exit the Syntax Tokens dialog.

How to change the CLO CLOC CLO0 element and field properties

Use this procedure to change the screen and EDI formats for the data, rename the field label, and add Help text to the Customer's ANA Location Code field.

Step	Action
1	Double-click the CLO CLOC CLO0 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Form Format field, enter 9 , which is the name of the syntax token you just created for allowing users to enter data with only the characters 0–9 in this element.
4	In the File Format field, enter 9 , which is the name of the syntax token you just created for allowing the EDI data to consist of only the characters 0–9 in this element.
5	Select the Display tab.
6	In the Label field, enter Location ANA Code to replace the existing field label.
7	Select the Help tab.

	Action
8	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the EAN location number identifying this customer's location. You must enter a numeric value in this field.
9	Click OK to exit the dialog.

How to customize the CLO CLOC CLO1 element

The CLO CLOC CLO1 element (Customer's Own Location Code) contains the code assigned by the customer for the location to which the invoiced items are to be delivered. In this tutorial, your users will enter the customer's own location code (which you have obtained from Pet Zone).

In this tutorial, you know that Pet Zone's own location code will not exceed ten characters, so you will change the field and element lengths to ten. In addition, you will rename the field label and add Help text to the field.

Use this procedure to change the field and element lengths, rename the field label, and add Help text to the Customer's Own Location Code field.

Step	Action
1	Double-click the CLO CLOC CLO1 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 10 to allow a ten-character string in this element.
4	Select the Display tab.
5	In the Label field, enter Location Own Code to replace the existing field label.
6	In the Display Length field, enter 10 to allow ten characters to be entered in this field.
7	Select the Help tab.
8	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the customer's own location number identifying the location to which the invoiced items are to be delivered. The customer's location number may not exceed 10 alphanumeric characters.
9	Click OK to exit the dialog.

How to customize the CLO CNAM element

The CLO CNAM element (Customer's Name) contains the customer's registered legal name.

In this tutorial, you want the Customer's Name field to be the same length as the address fields that follow (in the CLO CADD composite), so you will change the field and element lengths for the Customer's Name field to thirty-five. In addition, you will rename the field label and add Help text to the field.

Use this procedure to change the field and element lengths, rename the field label, and add Help text to the Customer's Name field.

Step	Action
1	Double-click the CLO CNAM element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 35 to allow a thirty-five-character string in this element.
4	Select the Display tab.
5	In the Label field, enter Name to replace the existing field label.
6	In the Display Length field, enter 35 to allow thirty-five characters to be entered in this field.
7	Select the Help tab.
8	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the customer's name. The name may not exceed 35 alphanumeric characters.
9	Click OK to exit the dialog.

How to customize the CLO CADD CAD0 element

The CLO CADD CAD0 element (Customer's Address Line 1) contains the first line of the customer's address. You will rename the field label to shorten it and add Help text to this field.

Use this procedure to rename the field label and add Help text to the Customer's Address Line 1 field.

Step	Action
1	Double-click the CLO CADD CAD0 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Address Line 1 to replace the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the first line of the customer's address. This address line may not exceed 35 alphanumeric characters.
6	Click OK to exit the dialog.

How to customize the CLO CADD CAD1 element

The CLO CADD CAD1 element (Customer's Address Line 2) contains the second line of the customer's address. You will rename the field label to shorten it and add Help text to this field.

Use this procedure to rename the field label and add Help text to the Customer's Address Line 2 field.

Step	Action
1	Double-click the CLO CADD CAD1 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Address Line 2 to replace the existing field label.
4	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the second line of the customer's address. This address line may not exceed 35 alphanumeric characters.
5	Click OK to exit the dialog.

How to customize the CLO CADD CAD2 element

The CLO CADD CAD2 element (Customer's Address Line 3) contains the third line of the customer's address. You will rename the field label to shorten it and add Help text to this field.

Use this procedure to rename the field label and add Help text to the Customer's Address Line 3 field.

Step	Action
1	Double-click the CLO CADD CAD2 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Address Line 3 to replace the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the third line of the customer's address. This address line may not exceed 35 alphanumeric characters.

Step	Action
6	Click OK to exit the dialog.

How to customize the CLO CADD CAD3 element

The CLO CADD CAD3 element (Customer's Address Line 4) contains the fourth line of the customer's address. You will rename the field label to shorten it and add Help text to this field.

Use this procedure to rename the field label and add Help text to the Customer's Address Line 4 field.

Step	Action
1	Double-click the CLO CADD CAD3 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Address Line 4 to replace the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the fourth line of the customer's address. This address line may not exceed 35 alphanumeric characters.
6	Click OK to exit the dialog.

How to customize the CLO CADD CAD4 element

The CLO CADD CAD4 element (Customer's Post Code) contains the post code of the customer's address. You will rename the field label to shorten it and add Help text to this field.

Use this procedure to rename the field label and add Help text to the Customer's Post Code field.

Step	Action
1	Double-click the CLO CADD CAD4 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Post Code to replace the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the post code of the customer's address. The post code may not exceed 8 alphanumeric characters.
6	Click OK to exit the dialog.
7	Click Generate Layout on the Main Toolbar to refresh the display of the screen entry form.

Customizing the IRF Segment

Overview The IRF segment (Invoice References) contains details about the invoice, such as the invoice number, invoice date, and tax-point date. This segment, and all the elements contained in it, must be present in the invoice. You already changed the maximum use for this segment, so that this segment will be used only once in an invoice.

How to customize the IRF INVN element The IRF INVN element (Invoice Number) contains the number assigned by the supplier for this invoice (in this tutorial, you are the supplier). You will rename the field label to shorten it and add Help text to this field. (You already set up this element as the document name.)

Use this procedure to rename the field label and add Help text to the Invoice Number field.

Step	Action
1	Double-click the IRF INVN element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Invoice No. to replace the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the invoice number. The invoice number may not exceed 17 alphanumeric characters.
6	Click OK to exit the dialog.

How to customize the IRF IVDT element

The IRF IVDT element (Date of Invoice) contains the invoice date. You will change the screen format for the invoice date to DD/MM/YY. Also, this element is defined by the standard to be a six-digit date. In this tutorial, your users will enter the invoice date as an eight-digit date, so you will change the element and field lengths to accommodate the longer date. In addition, you will rename the field label and add Help text to this field.

Use this procedure to change the screen format, change the field and element lengths, rename the field label, and add Help text to the Date of Invoice field.

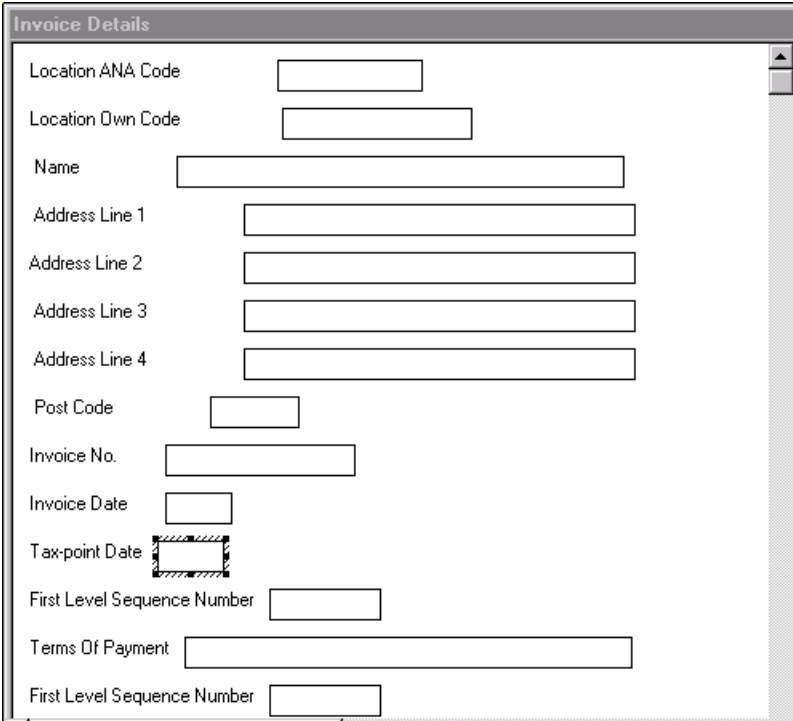
Step	Action
1	Double-click the IRF IVDT element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 8 to allow the entire date, including separators (/), to be contained in this element
4	From the Form Format drop-down list box, select DD/MM/YY to indicate that this field on the translation object will accept a date entered in the format DD/MM/YY.
5	Select the Display tab.
6	In the Label field, enter Invoice Date to replace the existing field label.
7	In the Display Length field, enter 8 to allow the entire date to be displayed, including separators (/).
8	Select the Help tab.
9	In the Help Text list box, enter the following text: Enter the invoice date. Use the format DD/MM/YY.
10	Click OK to exit the dialog.

How to customize the IRF TXDT element

The IRF TXDT element (Tax-Point Date) contains the date on which the VAT is applied. The tax-point date often is the same as the invoice date. You will change the screen format for the tax-point date to DD/MM/YY. Also, this element is defined by the standard to be a six-digit date. In this tutorial, your users will enter the invoice date as an eight-digit date, so you will change the element and field lengths to accommodate the longer date. In addition, you will add Help text to this field.

Use this procedure to change the screen format, change the field and element lengths, and add Help text to the Date of Invoice field.

Step	Action
1	Double-click the IRF TXDT element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 8 to allow the entire date, including separators (/), to be contained in this element.
4	From the Form Format drop-down list box, select DD/MM/YY to indicate that this field on the translation object will accept a date entered in the format DD/MM/YY.
5	Select the Display tab.
6	In the Display Length field, enter 8 to allow the entire date to be displayed, including separators (/).
7	Select the Help tab.
8	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the tax-point date. The tax-point date is the date the VAT was applied. Use the format DD/MM/YY.
9	Click OK to exit the dialog.

(Contd) Step	Action
10	<p>Click Generate Layout on the Main Toolbar to refresh the display of the screen entry form.</p> <p>The Invoice Details frame now should look like this:</p>  <p>The screenshot shows a window titled "Invoice Details" with the following fields:</p> <ul style="list-style-type: none"> Location ANA Code: <input type="text"/> Location Own Code: <input type="text"/> Name: <input type="text"/> Address Line 1: <input type="text"/> Address Line 2: <input type="text"/> Address Line 3: <input type="text"/> Address Line 4: <input type="text"/> Post Code: <input type="text"/> Invoice No.: <input type="text"/> Invoice Date: <input type="text"/> Tax-point Date: <input type="text"/> First Level Sequence Number: <input type="text"/> Terms Of Payment: <input type="text"/> First Level Sequence Number: <input type="text"/>

Customizing the PYT Segment

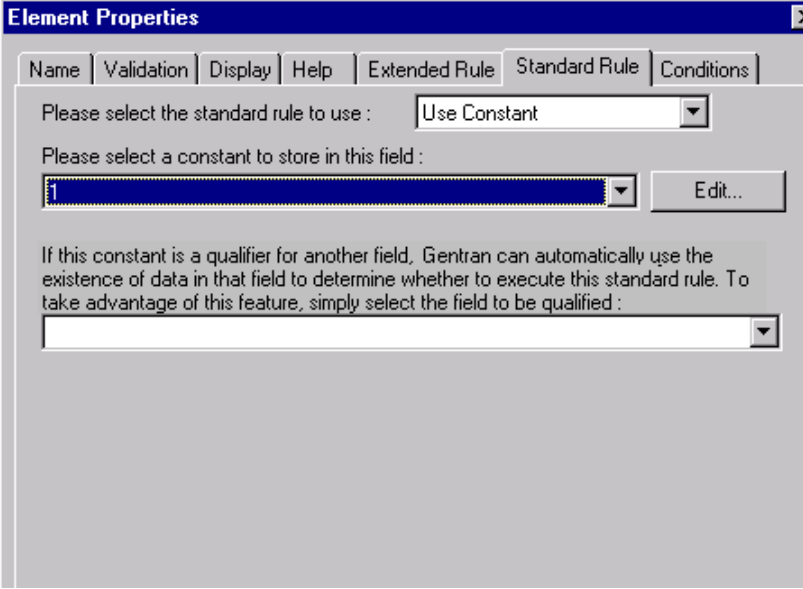
Overview The PYT segment (Settlement Terms) specifies the settlement terms that apply to the invoice. You already changed the maximum use of the PYT segment to one.

How to customize the PYT SEQA element

The PYT SEQA element (First Level Sequence Number) contains the sequence number for the PYT segment. According to the standard, this number starts at one and increases for each occurrence of the PYT segment. You already changed the maximum use of the PYT segment to one (indicating that you will use the PYT segment only once per invoice). You will define a constant value for this field, designating that the constant “ONE” (which has a value of “1”) is always the value in the PYT SEQA element. Then, you will prevent this field from being displayed in the screen entry form, since users will not need to enter a value in this field.

Use this procedure to define a constant and hide the First Level Sequence Number field.

Step	Action
1	Double-click the PYT SEQA element. System Response The Element Properties dialog is displayed.
2	Select the Standard Rule tab.
3	Click the Use Constant option from the drop-down list.
4	Click Edit to access the Map Constants dialog.
5	Click New to access the Edit Constant dialog.
6	In the ID field, enter ONE to identify the constant.
7	From the Type drop-down list box, select Integer to indicate that the literal constant will be formatted as an integer (number) data type (not containing decimal places).
8	In the Value field, enter 1 to indicate that the First Level Sequence Number field must contain the value 1. This value is the actual value of the literal constant.
9	Click OK to add the constant.
10	Click Close to exit the Map Constants dialog.

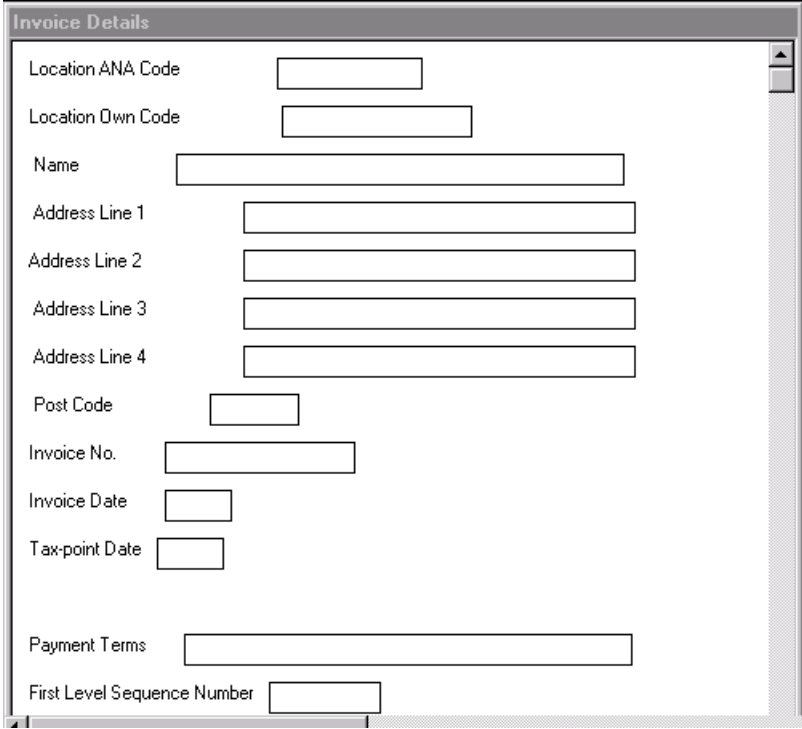
(Contd) Step	Action
11	<p>In the Constants drop-down list box, select 1 to identify the constant that will be used for this element.</p> <p>The dialog now should look like this:</p> 
12	Select the Display tab.
13	Click the Hidden radio button to prevent the field from being displayed in the translation object.
14	Click OK to exit the dialog.

How to customize the PYT PAYT element

The PYT PAYT element (Terms of Payment) contains the description of the settlement terms. You will rename the field label and add Help text to this field.

Use this procedure to rename the field label and add Help text to the Terms of Payment field.

Step	Action
1	<p>Double-click the PYT PAYT element.</p> <p>System Response The Element Properties dialog is displayed.</p>
2	Select the Display tab.

(Contd) Step	Action
3	In the Label field, enter Payment Terms to replace the existing field label.
4	Select the Help tab.
5	<p>In the Help Text list box, enter the following text (press Enter at the end of each line of text below):</p> <p>Enter the payment terms. The payment terms may not exceed 40 alphanumeric characters.</p>
6	Click OK to exit the dialog.
7	<p>Click Generate Layout on the Main Toolbar to refresh the display of the screen entry form.</p> <p>The Invoice Details frame now should look like this:</p>  <p>The screenshot shows a window titled "Invoice Details" with the following fields:</p> <ul style="list-style-type: none"> Location ANA Code: <input type="text"/> Location Own Code: <input type="text"/> Name: <input type="text"/> Address Line 1: <input type="text"/> Address Line 2: <input type="text"/> Address Line 3: <input type="text"/> Address Line 4: <input type="text"/> Post Code: <input type="text"/> Invoice No.: <input type="text"/> Invoice Date: <input type="text"/> Tax-point Date: <input type="text"/> Payment Terms: <input type="text"/> First Level Sequence Number: <input type="text"/>

Customizing the DNA Segment

Overview The DNA segment (Data Narrative) contains narrative (descriptive text) pertaining to the invoice. The standard allows this segment to be used up to 999,999 times in an invoice. Your users will use this segment only once per segment, so you already changed the maximum use to one.

How to customize the DNA SEQA:2 element

The DNA SEQA:2 element (First Level Sequence Number) contains the sequence number for the DNA segment. According to the standard, this number starts at one and increases for each occurrence of the DNA segment. You already changed the maximum use of the DNA segment to one (indicating that you will use the DNA segment only once per invoice). You will use the constant "ONE" (which has a value of "1"), so that "1" is always the value in the DNA SEQA:2 element. Then, you will prevent this field from being displayed in the screen entry form, since users will not need to enter a value in this field.

Step	Action
1	Double-click the DNA SEQA:2 element. System Response The Element Properties dialog is displayed.
2	Select the Standard Rule tab.
3	Select the Use Constant option from the drop-down list.
4	In the Constants drop-down list box, select 1 to identify the constant that will be used for this element.
5	Select the Display tab.
6	Click the Hidden radio button to prevent the field from being displayed in the translation object.
7	Click OK to exit the dialog.

How to customize the DNA GNAR GNA0 element

The DNA GNAR GNA0 element (General Narrative Line 1) contains descriptive text pertaining to the invoice. Users can enter up to four lines (each with up to forty characters) of descriptive text. For this tutorial, you will rename the field label Invoice Notes and add Help text to this field.

Use this procedure to rename the field label and add Help text to the General Narrative Line 1 field.

Step	Action
1	Double-click the DNA GNAR GNA0 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Invoice Notes to replace the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the first line of the invoice notes. The invoice notes consist of descriptive text that pertains to the entire invoice. This line of invoice notes may not exceed 40 alphanumeric characters.
6	Click OK to exit the dialog.

How to customize the DNA GNAR GNA1 element

The DNA GNAR GNA1 element (General Narrative Line 2) contains the second line of descriptive text pertaining to the invoice. Users can enter up to four lines (each with up to forty characters) of descriptive text. For this tutorial, only the first line of descriptive text (General Narrative Line 1) will be labelled. Therefore, you will remove the field label for the General Narrative Line 2 field and add Help text to this field.

Use this procedure to remove the field label and add Help text to the General Narrative Line 2 field.

Step	Action
1	Double-click the DNA GNAR GNA1 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, delete the existing field label.

Step	Action
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the second line of the invoice notes. The invoice notes consist of descriptive text that pertains to the entire invoice. This line of invoice notes may not exceed 40 alphanumeric characters.
6	Click OK to exit the dialog.

How to customize the DNA GNAR GNA2 element

The DNA GNAR GNA2 element (General Narrative Line 3) contains the third line of descriptive text pertaining to the invoice. Users can enter up to four lines (each with up to forty characters) of descriptive text. For this tutorial, only the first line of descriptive text (General Narrative Line 1) will be labelled. Therefore, you will remove the field label for the General Narrative Line 3 field and add Help text to this field.

Use this procedure to remove the field label and add Help text to the General Narrative Line 3 field.

Step	Action
1	Double-click the DNA GNAR GNA2 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, delete the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the third line of the invoice notes. The invoice notes consist of descriptive text that pertains to the entire invoice. This line of invoice notes may not exceed 40 alphanumeric characters.
6	Click OK to exit the dialog.

How to customize the DNA GNAR GNA3 element

The DNA GNAR GNA3 element (General Narrative Line 4) contains the fourth line of descriptive text pertaining to the invoice. Users can enter up to four lines (each with up to forty characters) of descriptive text. For this tutorial, only the first line of descriptive text (General Narrative Line 1) will be labelled. Therefore, you will remove the field label for the General Narrative Line 4 field and add Help text to this field.

Use this procedure to remove the field label and add Help text to the General Narrative Line 4 field.

Step	Action
1	Double-click the DNA GNAR GNA3 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, delete the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the fourth line of the invoice notes. The invoice notes consist of descriptive text that pertains to the entire invoice. This line of invoice notes may not exceed 40 alphanumeric characters.
6	Click OK to exit the dialog.
7	Click Generate Layout on the Main Toolbar to refresh the display of the screen entry form.

Customizing the ODD Group

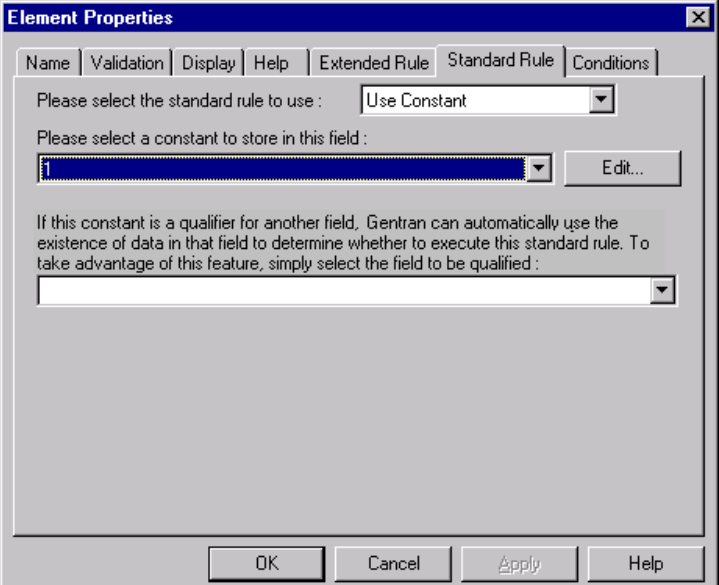
Overview

The ODD group contains the Order and Delivery Terms information for the invoice. In this tutorial, the ODD group will be used for information about the customer's order number, the date the order was placed, and the delivery number and date. The standard allows the ODD group to be used up to 999,999 times per invoice. In this tutorial, you will use the ODD group only once per invoice. You already changed the maximum use of the ODD group to one, which placed the associated fields on the main Invoice Details frame with the majority of the invoice fields.

How to customize the ODD:2 SEQA element

The ODD:2 SEQA element (First Level Sequence Number) contains the sequence number for the ODD:2 segment. According to the standard, this number starts at one and increases for each occurrence of the ODD:2 segment. The ODD:2 segment has a maximum use of only one, so the value in the ODD:2 SEQA element will always be "1". You will use the constant "ONE" (which has a value of "1"), so that "1" is always the value in the ODD:2 SEQA:2 element. Then, you will prevent this field from being displayed in the screen entry form, since users will not need to enter a value in this field.

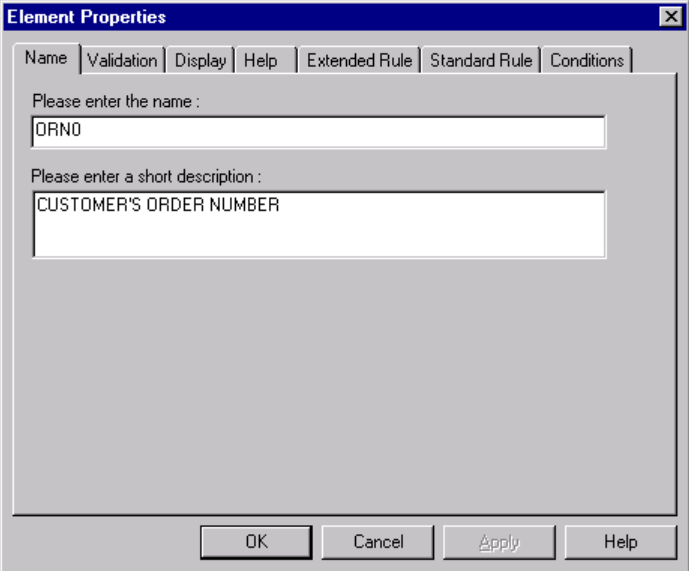
Step	Action
1	Double-click the ODD:2 SEQA element. System Response The Element Properties dialog is displayed.
2	Select the Standard Rule tab.
3	Select the Use Constant option from the drop-down list.

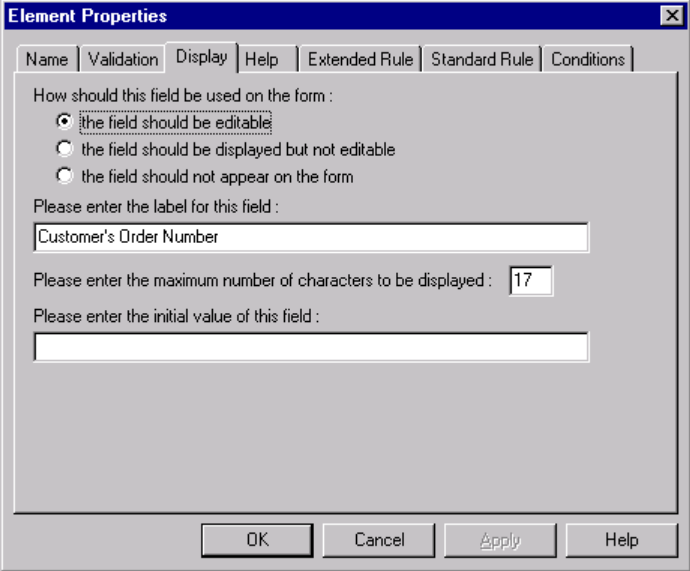
(Contd) Step	Action
4	<p>From the Constants drop-down list box, select 1 to identify the constant that will be used for this element.</p> <p>The dialog now should look like this:</p> 
5	Select the Display tab.
6	Click the Hidden radio button to prevent the field from being displayed in the translation object.
7	Click OK to exit the dialog.

**How to customize
the ODD:2 ORNO
ORNO element**

The ODD:2 ORNO ORNO element (Customer's Order Number) contains the number assigned by the customer to identify the order. You will rename the field label and add Help text to this field.

Use this procedure to change the field label for the Customer's Order Number field.

Step	Action
1	<p>Double-click the ODD:2 ORNO ORNO element.</p> <p>System Response The Element Properties dialog is displayed.</p> 

(Contd) Step	Action
2	<p>Click Display to access the Display Properties dialog.</p> 
3	<p>In the Label field, enter Customer's P.O. No. to replace the existing field label.</p>
4	<p>Select the Help tab.</p>
5	<p>In the Help Text list box, enter the following text (press Enter at the end of each line of text below):</p> <p>Enter the customer's purchase order number. The purchase order number may not exceed 17 alphanumeric characters.</p>
6	<p>Click OK to exit the dialog.</p>

How to customize the ODD:2 ORNO ORN2 element

The ODD:2 ORNO ORN2 element (Date Order Placed by Customer) contains the date on which the customer placed the purchase order. You will change the screen format for the purchase order date to DD/MM/YY. Also, this element is defined by the standard to be a six-digit date. In this tutorial, the purchase order date will be printed as an eight-digit date, so you will change the element and field lengths to accommodate the longer date. For brevity, you will change the field label to P.O. Date.

Use this procedure to change the screen format, change the element and field lengths, and rename the field label for the Date Order Placed by Customer field.

Step	Action
1	Double-click the ODD:2 ORNO ORN2 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 8 to allow the entire date, including separators (/), to be contained in this element.
4	From the Form Format drop-down list box, select DD/MM/YY to indicate that this field on the translation object will accept a date entered in the format DD/MM/YY.
5	Select the Display tab.
6	In the Label field, enter P.O. Date to replace the existing field label.
7	In the Display Length field, enter 8 to allow the entire date, including separators (/), to be displayed.
8	Select the Help tab.
9	In the Help Text list box, enter the following text: Enter the purchase order date. Use the format DD/MM/YY.
10	Click OK to exit the dialog.

How to customize the ODD:2 DELN DEL0 element

The ODD:2 DELN DEL0 element (Delivery Note Number) contains the number corresponding to the delivery note. The only customizing you will perform for this field is adding Help text.

Use this procedure to add Help text to the Delivery Note Number field.

Step	Action
1	Double-click the ODD:2 DELN DEL0 element. System Response The Element Properties dialog is displayed.
2	Select the Help tab.
3	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the number corresponding to the delivery note. The delivery note number may not exceed 17 alphanumeric characters.
4	Click OK to exit the dialog.

How to customize the ODD:2 DELN DEL1 element

The ODD:2 DELN DEL1 element (Date of Despatch by Supplier) contains the date on which the order was delivered. You will change the screen format for the delivery date to DD/MM/YY. Also, this element is defined by the standard to be a six-digit date. In this tutorial, the delivery date will be printed as an eight-digit date, so you will change the element and field lengths to accommodate the longer date. For brevity, you will change the field label to P.O. Date.

Use this procedure to change the screen format, change the element and field lengths, and rename the field label for the Date of Despatch by Supplier field.

Step	Action
1	Double-click the ODD:2 DELN DEL1 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 8 to allow the entire date, including separators (/), to be contained in this element.
4	From the Screen Format drop-down list box, select DD/MM/YY to indicate that this field on the translation object will accept a date entered in the format DD/MM/YY.
5	Select the Display tab.

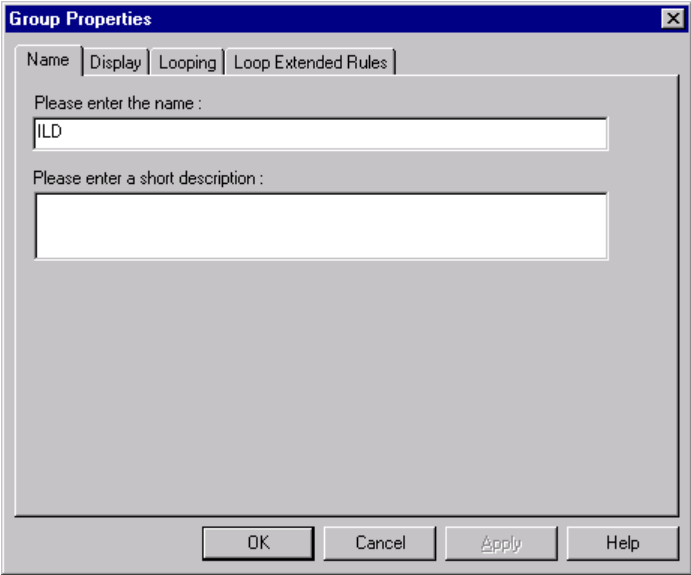
Step	Action
6	In the Label field, enter Delivery Date to replace the existing field label.
7	In the Display Length field, enter 8 to allow the entire date, including separators (/), to be displayed.
8	Select the Help tab.
9	In the Help Text list box, enter the following text: Enter the delivery date. Use the format DD/MM/YY.
10	Click OK to exit the dialog.

Customizing the ILD Group

Overview The ILD group (Invoice Line Details) contains the line item detail for each item invoiced. The standard allows the ILD group to be used up to 999,999 times per invoice.

The fields associated with the ILD group are arranged on the Ild frame, which is separate from the Invoice Details frame that you have been working with thus far in this tutorial. Your users will complete the fields on the Ild frame for each item in the invoice. The list of all line items in the invoice will be displayed in a list box on the Invoice Details frame. In that list box, the invoiced items will be displayed line by line, forming columns of information.

Procedure Use this procedure to rename the ILD frame and list box, provide a description for the ILD group, and add Help text to the line items list box.

Step	Action
1	Click the ILD group with the right mouse button to access the shortcut menu.
2	<p>Select Properties from the shortcut menu.</p> <p>System Response The Group Properties dialog is displayed.</p> 
3	In the Desc field, enter Line Items to describe the group.
4	Select the Display tab.
5	In the Frame Caption field, enter Line Items to rename the frame.

(Contd) Step	Action
6	In the List Caption field, enter Line Items to rename the list box that is displayed on the Invoice Details frame (listing the line items entered on the Line Items frame).
7	In the Frame Help Text list box, enter the following text (press Enter at the end of each line of text below): This frame contains line item detail information. For online Help on an individual field on this frame, select the field and press F1.
8	In the Listbox Help Text list box, enter the following text (press Enter at the end of each line of text below): This list box contains the line item detail for the invoice. The data in this list box is entered or changed on the Line Items frame. To enter a new line item, click the list box and click New. To modify an existing line item, click that item and click Open.
9	Click OK to exit the Group Properties dialog.

Customizing the ILD:2 Segment

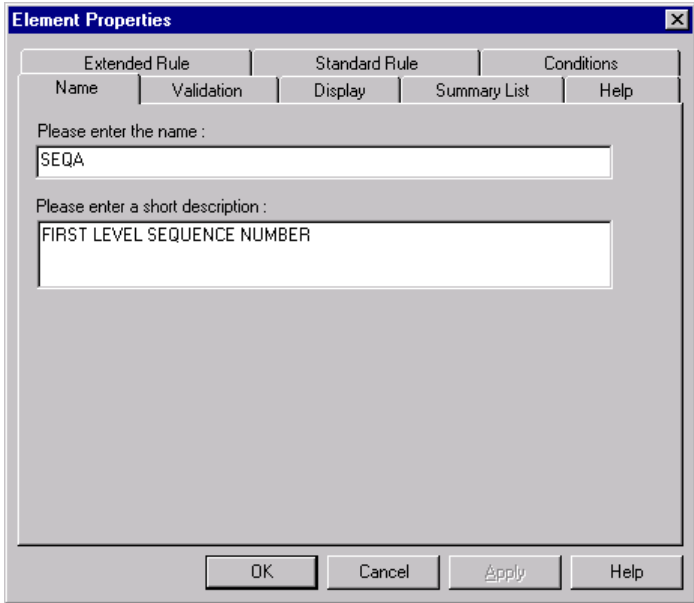
Overview The ILD:2 segment (Invoice Line Details) contains the line item detail for each item invoiced. For some of the elements in the ILD:2 segment, you only need to add Help text and rename the field labels so they more accurately reflect your company's needs. With other elements, you will change the maximum lengths for some of the fields, use accumulators to calculate the number of line items, or define a constant value.

The ILD:2 group is subordinate to the Invoice Details frame, so Sterling Gentran:Server creates a separate frame (the Line Items frame) to contain the group data (the line item details). The system also creates a list box (the Line Items list box) on the Invoice Details frame to allow the user to access the items in the list box. Each set of data is displayed as a row in the list box. After you customize the line item fields, the Line Items list box will contain these four columns of data: Item, Product, Qty, and Price.

How to customize the ILD:2 SEQA element

The ILD:2 SEQA element (First Level Sequence Number) contains the sequence number for the ODD group (the parent group in which the ILD:2 SEQA element resides). According to the standard, this number starts at one and increases for each occurrence of the ODD group. The ODD group has a maximum use of only one, so the value in the ILD:2 SEQA element will always be “1”. You will use the constant “ONE” (which has a value of “1”), so that “1” is always the value in the ILD:2 SEQA:2 element. Then, you will prevent this field from being displayed in the screen entry form, since users will not need to enter a value in this field.

Use this procedure to use a constant and hide the First Level Sequence Number field.

Step	Action
1	<p>Double-click the ILD:2 SEQA element.</p> <p>System Response The Element Properties dialog is displayed.</p> 
2	Select the Use Standard Rule tab.
3	Select the Use Constant option.
4	From the Constants drop-down list box, select 1 to identify the constant that will be used for this element.
5	Select the Display tab.
6	Click the Hidden radio button to prevent the field from being displayed in the translation object.
7	Click OK to exit the dialog.

Customizing the ILD:2 SEQB element

The ILD:2 SEQB element (Second Level Sequence No.) contains the second-level sequence number for the ILD:2 segment in the ILD group (the subordinate group in which the ILD:2 SEQB element resides). According to the standard, this number starts at one and increases for each occurrence of the ILD group. You will use the Loop Count function to obtain the value of the current loop count, and then you will make this field display-only (since the users will not need to enter a value in this field). Also, since the value in this field reflects the sequential number for each line item, you will rename the field label Item No.

You will create a list box definition for this element to include the item number in the list box. Also, you know that your users will enter no more than 99,999 line items per invoice. Each line item will be numbered sequentially, starting with one, so you need a maximum length of only five digits for this field. You will change the field and element lengths for this field to five.

Use this procedure to rename the field label, change the field and element lengths, add Help text, and create the list box definition for the Second Level Sequence No. field.

Step	Action
1	Double-click the ILD:2 SEQB element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 5 to allow a five-digit number in this element.
4	Select the Use Standard Rule tab.
5	Select the Loop Count option from the drop-down list.
6	In the Groups drop-down list box, select ILD to identify the loop for which you want to obtain the current value of the loop count. The ILD group is a nested group (the ODD group is the parent group of the ILD group).
7	Select the Display tab.
8	In the Display section, click the Display radio button to make this field display-only.
9	In the Label field, enter Item No. to replace the existing field label
10	In the Display Length field, enter 5 to allow five numeric digits to be displayed in the field.
11	Select the Summary List tab.

(Contd) Step	Action
12	Select the Display this field in summary list check box to turn this option on. The value in the Item No. field will be displayed in a column in the Line Items list box.
13	In the Column Width field, enter 8 to set the width of this column in the Line Items list box. Note The column width should be wider than the actual content of the column. The extra space that is not used for the content of the column will provide white space separating the columns. If the width for each column is the exact width of the data, then there will not be space separating the columns of data.
14	From the Sequence drop-down list box, select 1 to indicate that this field will be the first column in the list box.
15	Click OK to exit the dialog.

How to customize the **ILD:2 SPRO** **SPR0** element

The **ILD:2 SPRO SPR0** element (EAN-13 Code for the Traded Unit) contains the number of the thirteen-digit European Article Number allocated to the unit of trade (the invoiced item). In this tutorial, you will rename the field label to shorten it and add Help text to this field.

Use this procedure to rename the field label and add Help text to the EAN-13 Code for the Traded Unit field.

Step	Action
1	Double-click the ILD:2 SPRO SPR0 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter EAN Code to replace the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the EAN code for the invoiced item. The EAN code must be exactly 13 alphanumeric characters long.
6	Click OK to exit the dialog.

How to customize the ILD:2 SPRO SPR1 element

The ILD:2 SPRO SPR1 element (Supplier's Code for the Traded Unit) contains the supplier's internal reference identifying the invoiced item (in this tutorial, your company is the supplier). You will rename the field label and add Help text to this field.

Also, you will create a list box definition for this element to include the supplier's product code in the Line Items list box on the Invoice Details frame.

Use this procedure to rename the field label, add Help text, and create the list box definition for the Supplier's Code for the Traded Unit field.

Step	Action
1	Double-click the ILD:2 SPRO SPR1 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Supplier's Product Code to replace the existing field label.
4	Select the Summary List tab.
5	Click the Display this field in summary list check box to turn this option on. The value in the Supplier's Product Code field will be displayed in a column in the Line Items list box.
6	In the Column Width field, enter 33 to set the width of this column in the Line Items list box. Note The column width should be wider than the actual content of the column. The extra space that is not used for the content of the column will provide white space separating the columns. If the width for each column is the exact width of the data, then there will not be space separating the columns of data.
7	From the Sequence drop-down list box, select 2 to indicate that this field will be the second column in the list box.
8	Select the Help tab.
9	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the supplier's product code for the invoiced item. The product code may not exceed 30 alphanumeric characters.
10	Click OK to exit the dialog.

How to customize the ILD:2 CPRO CPR1 element

The ILD:2 CPRO CPR1 element (Customer's Item Code) contains the customer's internal reference identifying the invoiced item. Your users can obtain this information from the customer's purchase order. In this tutorial, you will rename the field label and add Help text to this field.

Use this procedure to rename the field label and add Help text to the Customer's Item Code field.

Step	Action
1	Double-click the ILD:2 CPRO CPR1 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Customer's Product Code to replace the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the customer's product code for the invoiced item. The code may not exceed 30 alphanumeric characters.
6	Click OK to exit the dialog.

How to customize the ILD:2 QTYI QTY0 element

The ILD:2 QTYI QTY0 element (Number of Order Units Invoiced) contains the quantity of invoiced items for this line item. You will create a list box definition for this element to include the quantity invoiced in the list box on the Invoice Details frame. For brevity, you will rename the field label. Also, the standard defines this field as a string data type, and allows up to fifteen alphanumeric characters in this element. However, your users will enter number-type data in N0 format (formatted with an implicit decimal point and no decimal places). Therefore, you will change the data type and the screen and EDI formats to reflect the data your users will enter.

In addition, your users will enter quantities no greater than five digits (e.g. 99,999). You will change the field and element lengths to reflect the smaller data length. Then, you will add Help text to this field.

Use this procedure to change the data type and screen and EDI formats, rename the field label, change the field and element lengths, add Help text, and create the list box definition for the Number of Order Units Invoiced field.

Step	Action
1	Double-click the ILD:2 QTYI QTY0 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	In the Max field, enter 5 to allow a five-digit number in this element.
4	From the Data Type drop-down list box, select Number to allow a number data type in this element. Sterling Gentran:Server prompts you that changing the field's data type will invalidate its format.
5	Click Yes to proceed with modifying the properties of this element.
6	From the Form Format drop-down list box, select N0 to indicate that this field will accept a number with an implied decimal point and no decimal places.
7	From the File Format drop-down list box, select N0 to format the EDI data with an implied decimal point and no decimal places.
8	Select the Display tab.
9	In the Label field, enter Quantity to replace the existing field label.
10	In the Display Length field, enter 5 to allow five numeric digits to be displayed in the field.
11	Select the Summary List tab.
12	Click the Display this field in summary list check box to turn this option on. The value in the Quantity field will be displayed in a column in the Line Items list box on the Invoice Details frame.
13	In the Column Width field, enter 8 to set the width of this column in the Line Items list box. Note The column width should be wider than the actual content of the column. The extra space that is not used for the content of the column will provide white space separating the columns. If the width for each column is the exact width of the data, then there will not be space separating the columns of data.
14	From the Sequence drop-down list box, select 3 to indicate that this field will be the third column in the list box.

Step	Action
15	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the quantity of this invoiced item. The quantity may not exceed 5 digits.
16	Click OK to exit the dialog.

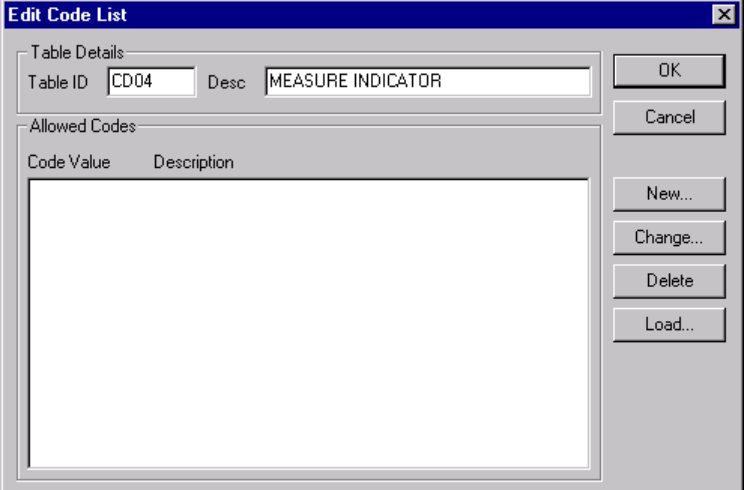
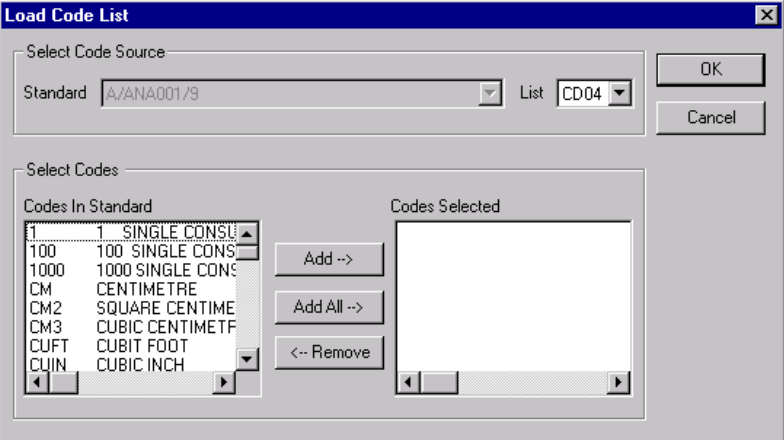
How to customize the ILD:2 QTYI CD04:2 element

The ILD:2 QTYI CD04:2 element (Measure Indicator) contains the abbreviation for the measure of the invoiced item (e.g. kilometres, metres, litres). You want all the available codes from Code Values List 4 to be available to your screen entry users, so you will load the entire code list. Loading the code list in this element causes a drop-down list box to be displayed on the Invoice Details frame (instead of a field). Users will select an appropriate code from the list box, instead of entered a value in the field.

After you specify the code list table to use for the drop-down list box for the Measure Indicator field, you will rename the field label and add Help text to the field.

Use this procedure to load Code Values List 4 from the standard, rename the field label, and add Help text to the Measure Indicator field.

Step	Action
1	Double-click the ILD:2 QTYI CD04:2 element. System Response The Element Properties dialog is displayed.
2	Select the Standard Rule tab.
3	Select the Use Code option.

(Contd) Step	Action
4	<p>Click Edit to access the Edit Code List dialog.</p>  <p>The Table ID field contains CD04, the name of the element for which this code list table will be used. The Desc field contains “Measure Indicator”, the description of the element for which this code list table will be used.</p>
5	<p>Click Load to access the Load Code List dialog. You will be prompted to select an ODBC data source name. Select the appropriate DSN and click OK to access the Load Code List dialog. The Codes In Standard list box contains the entire code list.</p> 
6	<p>Click Add All to move all of the codes in the code list table to the Codes Selected list box.</p> <p>Note Adding all the codes in the list (by using Add All) creates a much larger form than if you use only selected codes. However, it is necessary for your users to have all the codes available from which to choose.</p>

(Contd) Step	Action
7	Click OK to load the code list table and exit the Load Code List dialog.
8	Click Close to exit the Edit Code List dialog.
9	Click the Raise a compliance error check box to specify that, for compliance reasons, the element <i>must</i> contain one of the codes from Code Values List 4 (nothing else is valid for that element).
10	Select the Display tab.
11	In the Label field, enter Unit of Measure to replace the existing field label.
12	Select the Help tab.
13	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Select the unit of measure for this invoiced item from the drop-down list box.
14	Click OK to exit the dialog.

How to customize the ILD:2 AUCT AUC0 element

The ILD:2 AUCT AUC0 element (Cost Price (Excluding VAT)) contains the price per unit invoiced. This price is the cost in pounds before line discounts and VAT have been applied. The EDI data will be formatted in N4 format (formatted with an implicit decimal point and four decimal places), but your users will enter the price in the translation object in R4 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the price to be entered in the translation object.

You will create a list box definition for this element to include the unit price in the list box on the Invoice Details frame. Also, you will rename the field label and add Help text to this field.

Use this procedure to change the screen format, rename the field label, add Help text, and create the list box definition for the Cost Price (Excluding VAT) field.

Step	Action
1	Double-click the ILD:2 AUCT AUC0 element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.

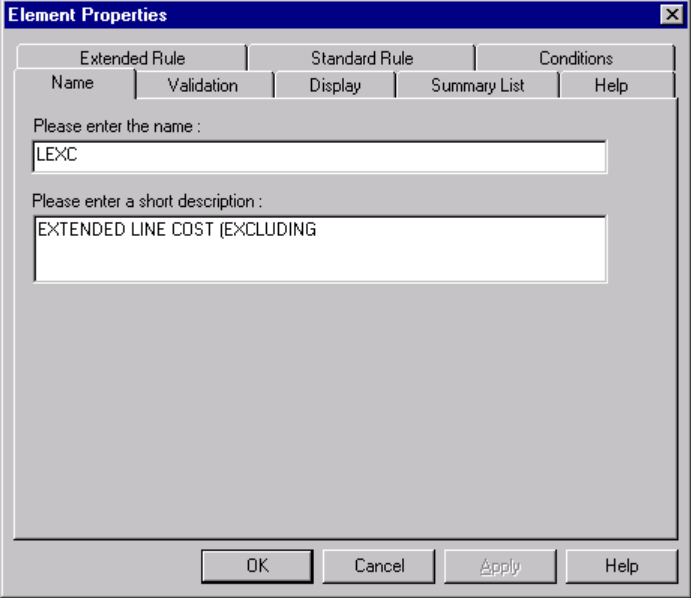
	Action
3	From the Form Format drop-down list box, select R4 to indicate that this field will accept a number with an explicit decimal point and up to four decimal places.
4	Select the Display tab.
5	In the Label field, enter Unit Price (Ex. VAT) to replace the existing field label.
6	Select the Summary List tab.
7	Click the Display this field in summary list check box to turn this option on. The value in the Unit Price (Ex. VAT) field will be displayed in a column in the Line Items list box on the Invoice Details frame.
8	In the Column Width field, enter 14 to set the width of this column in the Line Items list box. Note You do not need to make the column width for this field wider than the actual content of the column. The data from this field will form the last column in the list box, and you do not need to leave white space between the last column and the side of the list box.
9	From the Sequence drop-down list box, select 4 to indicate that this field will be the third column in the list box.
10	Select the Help tab.
11	In the Help Text list box, enter the following text: Enter the unit price for this invoiced item.
12	Click OK to exit the dialog.

How to customize the ILD:2 LEXC element

The ILD:2 LEXC element (Extended Line Cost (Excluding VAT)) contains the price per unit invoiced, after any line discounts have been applied. This price is the net cost in pounds (e.g. after deducting line discounts, etc., but before the application of VAT). The EDI data will be formatted in N4 format (formatted with an implicit decimal point and four decimal places), but your users will enter the price in the translation object in R4 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the price to be formatted in the translation object.

Also, you will prevent this field from being displayed in the translation object. The extended line cost will be calculated automatically when users click STORE on the Line Items frame when they use this translation object in Sterling Gentran:Server. You can hide this field because users will not need to enter the value in the field.

Use this procedure to change the screen format for the Extended Line Cost (Excluding VAT) field, and prevent this field from being displayed.

Step	Action
1	<p>Double-click the ILD:2 LEXC element.</p> <p>System Response The Element Properties dialog is displayed.</p> 
2	Select the Validation tab.
3	From the Form Format drop-down list box, select R4 to indicate that this field will accept a number with an explicit decimal point and up to four decimal places.
4	Select the Display tab.

(Contd) Step	Action
5	Click the Hidden radio button to prevent this field from being displayed in the translation object.
6	Click OK to exit the dialog.

How to calculate the extended price

You want to automate the calculation that results in the extended price for each line item, so that the screen entry users who use your invoice translation object do not have to perform this calculation manually. A simple way to perform this calculation is to use an extended rule to define the operation in the ILD group. You define extended rule with the Sterling Gentran:Server proprietary programming language, which gives you access to the entire Sterling Gentran:Server internal storage area.

Use this procedure to define an extended rule to calculate the extended price.

Step	Action
1	Click the ILD group (in the ODD group) with the right mouse button to access the shortcut menu.
2	Select Extended Rules from the shortcut menu. System Response The Loop Level Extended Rules dialog is displayed.
3	Click the On Store radio button to indicate that you want the rule to be executed when you store a group.
4	In the Editor list box, enter the following extended rule: #LEXC = #QTY0 * #AUC0; This extended rule means that the value of the ILD:2 LEXC field is equal to the product of the values in the ILD:2 QTYI QTY0 and ILD:2 AUCT AUC0 fields. In other words, the quantity invoiced for one line item, multiplied by the price (excluding VAT) for each unit invoiced, equals the extended price (excluding VAT).
5	Click Compile to compile the extended rule and verify that this rule does not cause errors or warnings. If you receive any errors or warnings when you compile the rule, verify that you entered the rule exactly as it is written in step 4 above. After you make any change to the extended rule to correct it, click Compile again. Repeat this process until there are no errors generated.
6	Click OK to add the extended rule to the form and exit the Loop Level Extended Rules dialog.

**How to customize
the ILD:2 CD12
element**

The ILD:2 CD12 element (VAT Rate Category Code) contains the code from Codes Values List 12 to designate the VAT rate category for this invoiced item (e.g. standard rate, exemption from VAT, higher rate, etc.). You will use a Select standard rule on the VAT Rate Category Code field, but first you need to create a temporary VATP element.

Sterling Gentran:Server enables you to use selected information from the Sterling Gentran:Server partner database in your forms via a Select standard rule. You can map information from your trading partner's profile in the Partner Editor to a selected element in the form. The information that you can use in the form includes any fields in a table (location, lookup, or cross-reference) or data from the partner record.

For this form, you need to map the appropriate VAT rate based on the code in the ILD:2 CD12 element from a lookup table, to look up data that you will map (via a standard rule) to the temporary VATP_TEMP field that you create. When you use tables, you must decide whether to create a code table in Sterling Gentran:Server that can be used only with this form, or to add the table to either the partner relationship or the internal system partner in Partner Editor. In this tutorial, you will set up the table you use under the internal system partner (Internal System User) so the table can be used globally.

In this tutorial, you need to extract information from a lookup table and insert it into the form. A lookup table is used when you want to supplement data before it is sent to your partner.

Reference

See the *IBM Sterling Gentran:Server® for Microsoft Windows User Guide* for more information on lookup tables.

Note

You do not need to create this lookup table (INVATCO.LKP). It is included with the tutorial data that is provided when you install Sterling Gentran:Server.

After you use the Select function, all the available codes from the selected table will be available in a drop-down list box (instead of a field) on the Invoice Details frame. Users will select an appropriate code from the drop-down list box, instead of entered a value in the field.

In addition to using the Select function, you will rename the field label and add Help text to the field.

How to create a temporary VATP element

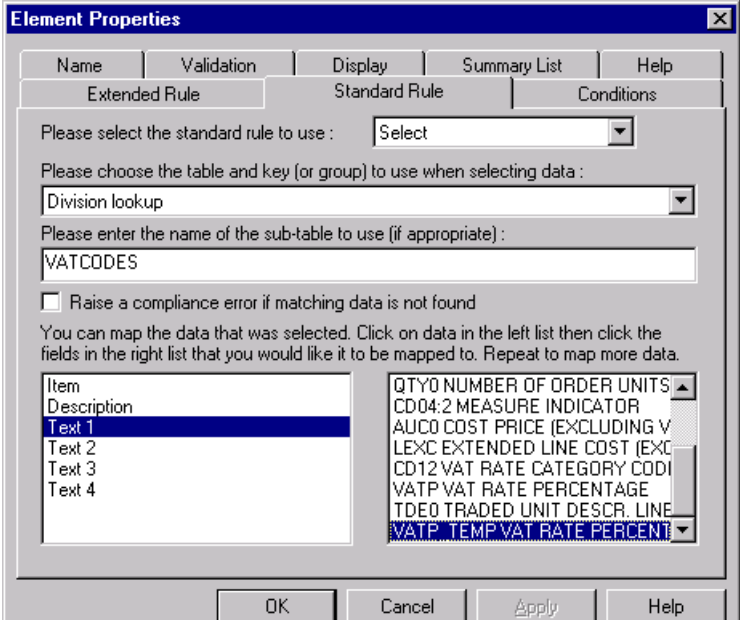
Use this procedure to create a temporary VATP element.

Step	Action
1	Select the ILD:2 VATP element.
2	Click Copy on the Main Toolbar.
3	Select the ILD:2 SCRF composite, which is the last form component in the ILD:2 segment. The ILD:2 SCRF composite is the composite <i>after</i> which you want the ILD:2 VATP element to be pasted.
4	Click Paste on the Main Toolbar to paste the ILD:2 VATP element. System Response Sterling Gentran:Server prompts you to specify whether you want the contents of the Clipboard pasted as a child (subordinate) of the selected composite, or at the same level as the composite.
5	Click the Paste after selected item (at the same level) radio button to paste the Clipboard contents after the ILD:2 SCRF composite. A new element (ILD:2 VATP:2) is created. The ILD:2 VATP:2 element is an exact copy of the ILD:2 VATP element.
6	Click OK to exit the dialog. Note You should rename the ILD:2 VATP:2 element to give it a more descriptive name.
7	Double-click the ILD:2 VATP:2 element. System Response The Element Properties dialog is displayed.
8	In the Name field, enter VATP_TEMP to replace the existing field label.
9	Click OK to exit the Element Properties dialog. The ILD:2 VATP:2 element is renamed ILD:2 VATP_TEMP.

How to change the ILD:2 CD12 element and field properties

Use this procedure to use the Select function, rename the field label, and add Help text to the VAT Rate Category Code field.

Step	Action
1	Double-click the ILD:2 CD12 element. System Response The Element Properties dialog is displayed.
2	Select the Standard Rule tab.

(Contd) Step	Action
3	Select the Select option.
4	In the Table drop-down list box, select Division lookup . You are using the Division lookup because the VAT codes do not vary on a partner-by-partner basis, so you can use the Internal System User partner and map from any field on the Lookup Entry dialog (in Partner Editor in Sterling Gentran:Server). You will be able to set up the lookup only once, regardless of the number of partners with which you will use this translation object.
5	In the Sub Table field, enter VATCODES , which is the name of the table name for the Internal System User partner that you will import.
6	In the Map From list box, select Text 1 , which is the field on the Lookup Entry dialog in Partner Editor from which the contents will be mapped.
7	<p>In the Map To list box, select VATP_TEMP, which is the temporary VATP element you just created. The system will map the value from Partner Editor to the VATP_TEMP element.</p> <p>The dialog now should look like this:</p> 
8	Select the Display tab.
9	In the Label field, enter VAT Code to replace the existing field label.
10	Select the Help tab.

(Contd) Step	Action
11	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Select the VAT code for this invoiced item from the drop-down list box.
12	Click OK to exit the dialog.

How to customize the ILD:2 VATP element

The ILD:2 VATP element (VAT Rate Percentage) contains the percentage rate for the VAT category code. Screen entry translation object users will not need to enter a value in this field because Sterling Gentran:Server will look up the percentage in the VATCODES table in Partner Editor and place the result in the ILD:2 VATP element automatically. You will prevent the ILD:2 VATP element from being displayed on the translation object.

Use this procedure to hide the VAT Rate Percentage field.

Step	Action
1	Double-click the ILD:2 VATP element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	Click the Hidden radio button to prevent the field from being displayed in the translation object.
4	Click OK to exit the dialog.

How to customize the ILD:2 VATP_TEMP element

The ILD:2 VATP_TEMP element (VAT Rate Percentage) is the temporary element you created to map the VAT rate percentage in the VATCODES division lookup table. To map from the partner database to the VATP_TEMP field, the target field (VATP_TEMP) needs to be a string-type element. You will use the ILD:2 VATP_TEMP element to convert the VAT rate percentage (a string) into a real number (the data type required in the ILD:2 VATP field). For compliance reasons, you cannot change the data type in the ILD:2 VATP element; therefore, you created the ILD:2 VATP_TEMP element, whose data type you may change.

The system will be able to look up the VAT rate percentage (a string data type) in the VATCODES table, and map the string to the ILD:2 VATP_TEMP element. Later, you will add an extended rule to the ILD group to convert the string in the ILD:2 VATP_TEMP element to a number in the ILD:2 VATP element, then remove all data from the ILD:2 VATP_TEMP element (so that element is empty). After having executed these functions, the system will have converted a string data type to a real number, maintaining the integrity of the data and the compliance of the invoice.

Use this procedure to hide the VAT Rate Percentage field and change the data type for this field to string.

Step	Action
1	Double-click the ILD:2 VATP_TEMP element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	Click the Mandatory check box to make this element conditional.
4	In the Min field, enter 0 for the minimum number of digits allowed for this element.
5	From the Data Type drop-down list box, select String to allow a string data type in this element. Sterling Gentran:Server prompts you that changing the field's data type will invalidate its format.
6	Click Yes to proceed with modifying the properties of this element.
7	Select the Display tab.
8	Click the Hidden radio button to prevent the field from being displayed in the translation object.
9	Click OK to exit the dialog.

How to convert strings into real numbers

You created the ILD:2 VATP_TEMP element as a temporary element for converting strings into numbers. The first step in converting strings into elements, in this tutorial, was to create the ILD:2 VATP_TEMP element so that the system will use that element to look up the VAT rate percentage (a string data type) in the VATCODES table, then map the string to the ILD:2 VATP_TEMP element. The next step is to use an extended rule in the ILD group to convert the string in the ILD:2 VATP_TEMP element into a real number that can be used in the ILD:2 VATP element, and then delete any data left in the temporary element (ILD:2 VATP_TEMP).

Use this procedure to define an extended rule to convert strings into numbers.

Step	Action
1	Click the ILD group (in the ODD group) with the right mouse button to access the shortcut menu.
2	Select Extended Rules from the shortcut menu. System Response The Loop Level Extended Rules dialog is displayed.

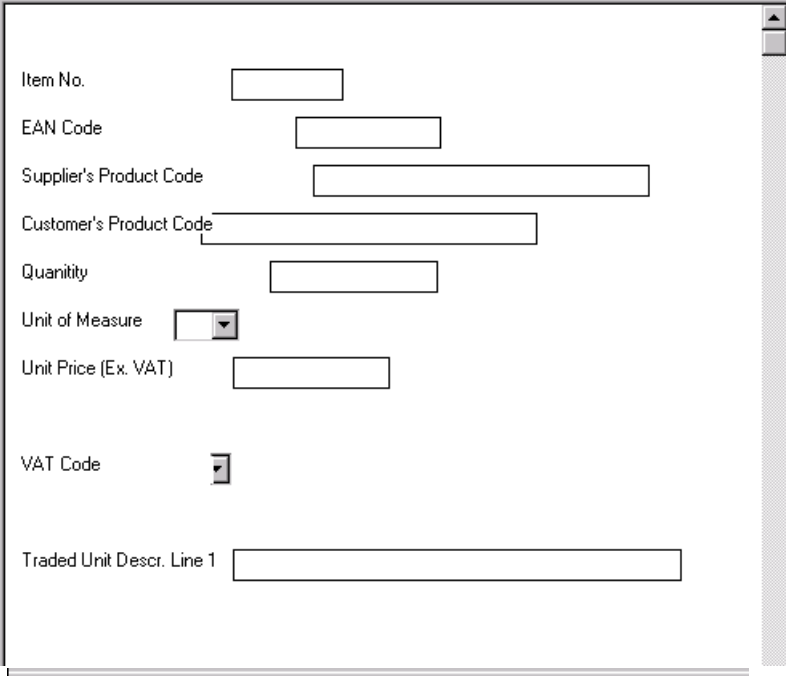
	Action
3	<p>Click the On Store radio button to indicate that you want the rule to be executed when you store a group. (The extended rule you added to calculate an extended price is displayed in the Editor list box of the Loop Level Extended Rules dialog.) When the screen entry users click Store on the Line Items frame in Sterling Gentran:Server, all On Store extended rules in the Loop Level Extended Rules dialog will be executed.</p>
4	<p>On the next two lines in the Editor list box, enter the following extended rule:</p> <pre>#VATP = ATON(#VATP_TEMP); empty(#VATP_TEMP);</pre> <p>The ATON function tells the system to convert the string data in the ILD:2 VATP_TEMP element into a real number.</p> <p>The calculation you entered on the first line places the number data in the ILD:2 VATP element.</p> <p>The empty function sets the value of the ILD:2 VATP_TEMP field to null.</p>
5	<p>Click Compile to compile the extended rule and verify that this rule does not cause errors or warnings.</p> <p>If you receive any errors or warnings when you compile the rule, verify that you entered the rule exactly as it is written in step 4 above. After you make any change to the extended rule to correct it, click COMPILE again. Repeat this process until there are no errors generated.</p>
6	<p>Click OK to add the extended rule to the form and exit the Loop Level Extended Rules dialog.</p>

How to customize the ILD:2 TDES TDE0 element

The ILD:2 TDES TDE0 element (Traded Unit Descr. Line 1) contains the description of the invoiced item. You will rename the field label to shorten it and add Help text to this element.

Use this procedure to rename the field label and add Help text to the Traded Unit Descr. Line 1 field.

Step	Action
1	Double-click the ILD:2 TDES TDE0 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	In the Label field, enter Description to replace the existing field label.
4	Select the Help tab.
5	In the Help Text list box, enter the following text (press Enter at the end of each line of text below): Enter the description of the invoiced item. The description may not exceed 40 alphanumeric characters.
6	Click OK to exit the dialog.

(Contd) Step	Action
7	<p>Click Generate Layout on the Main Toolbar to refresh the display of the screen entry form.</p> <p>The Line Items frame now should look like this:</p>  <p>The screenshot shows a window titled 'Line Items' with the following fields and controls:</p> <ul style="list-style-type: none"> Item No. [Text Box] EAN Code [Text Box] Supplier's Product Code [Text Box] Customer's Product Code [Text Box] Quantity [Text Box] Unit of Measure [Dropdown Menu] Unit Price (Ex. VAT) [Text Box] VAT Code [Dropdown Menu] Traded Unit Descr. Line 1 [Text Box]

How to customize the STL segment

The STL segment (VAT Rate Invoice Sub Trailer) contains the invoice amounts relating to the VAT rate. All monetary values in this segment are in pounds. You will use an extended rule to perform the calculations that will be displayed in the fields in the STL segment. Screen entry translation object users will be able to view the values in these fields (in the VAT Summary frame), but will not be able to change the values.

Reference

See *Producing the VAT Summary and the Invoice Trailer* on page 3 - 105 for details on how to add the extended rule.

The fields associated with the STL segment are arranged on the Stl frame. Your users will complete the fields on the STL frame for each VAT rate calculation. The list of all VAT rates in the invoice will be displayed in a list box on the Invoice Details frame. In that list box, the VAT rates will be displayed for each line item, forming columns of information.

Use this procedure to rename the STL frame and list box, provide a description for the STL segment, and add Help text to the list box.

Step	Action
1	Click the STL segment with the right mouse button to access the shortcut menu.
2	Select Properties from the shortcut menu. System Response The EDI Segment Properties dialog is displayed.
3	Select the Display tab.
4	In the Frame Caption field, enter VAT Summary to rename the frame.
5	In the List Caption field, enter VAT Summary to rename the list box that is displayed on the Invoice Details frame (listing the VAT rates entered on the VAT Summary frame).
6	In the Frame Help Text list box, enter the following text (press Enter at the end of each line of text below): This frame contains VAT summary information. All the fields on this frame are display-only. You may view the values in these fields, but you cannot change any of the values. All calculations will be updated when you click the Recalculate button on the Invoice Details frame.
7	In the Listbox Help Text list box, enter the following text (press Enter at the end of each line of text below): This list box contains VAT summary information. To view details about a VAT rate listed in the VAT Summary list box, click that VAT rate and click Open. You will be able to view the values in these fields, but you will not be able to change any of them. All calculations will be updated when you click the Recalculate button on the Invoice Details frame.
8	Click OK to exit the EDI Segment Properties dialog.

How to customize the STL SEQA:7 element

The STL SEQA:7 element (First Level Sequence Number) contains the sequence number for the STL segment. This element is mandatory, but your screen entry translation object users will not need to enter a value in this field (the value will be assigned in the extended rule you add later in this tutorial in the INVOIC file). Therefore, you will prevent this field

from being displayed in the screen entry translation object, since users will not need to enter a value in this field.

Use this procedure to hide the First Level Sequence Number field.

Step	Action
1	Double-click the STL SEQA:7 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	Click the Hidden radio button to prevent the field from being displayed in the translation object.
4	Click OK to exit the dialog.

How to customize the STL CD12:2 element

The STL CD12:2 element (VAT Rate Category Code) contains the VAT rate category as listed in Code Values List 12. You will create a list box definition for this element to include the VAT rate category code in the VAT Summary list box on the Invoice Details frame. You will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. (The values in this field will be assigned in the extended rule you add later in this tutorial in the INVOIC file.) Also, you will rename the field label.

Use this procedure to rename the field label, make this field display-only, and create the list box definition for the VAT Rate Category Code field.

Step	Action
1	Double-click the STL CD12:2 element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	Click the Display radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
4	In the Label field, enter VAT Code to replace the existing field label.
5	Select the Summary List tab.
6	Click the Display this field in summary list check box to turn this option on. The value in the VAT Code field will be displayed in a column in the VAT Summary list box on the Invoice Details frame.
7	In the Column Width field, enter 4 to set the width of this column in the VAT Summary list box. Note The column width should be wider than the actual content of the column. The extra space that is not used for the content of the column will provide white space separating the columns. If the width for each column is the exact width of the data, then there will not be space separating the columns of data.
8	From the Sequence drop-down list box, select 1 to indicate that this field will be the first column in the list box.
9	Click OK to exit the dialog.

How to customize the STL VATP:2 element

The STL VATP:2 element (VAT Rate Percentage) contains the percentage rate for the VAT category code (in the STL CD12:2 element). The EDI data will be formatted in N3 format (formatted with an implicit decimal point and three decimal places), but you want the VAT rate percentage to be displayed in the translation object in R3 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the amount to be formatted in the translation object.

You will create a list box definition for this element to include the VAT rate percentage in the VAT Summary list box on the Invoice Details frame. You will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

Use this procedure to change the screen format, make the field display-only, rename the field label, and create the list box definition for the VAT Rate Percentage field.

Step	Action
1	Double-click the STL VATP:2 element. System Response The Element Properties dialog is displayed.
2	From the Form Format drop-down list box, select R3 to indicate that this field will display a number with an explicit decimal point and up to three decimal places.
3	Select the Display tab.
4	Click the Displayed but not editable radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
5	In the Label field, enter VAT Rate to replace the existing field label.
6	Select the Summary List tab.
7	Click the Display this field in summary list check box to turn this option on. System Response The value in the VAT Rate field will be displayed in a column in the VAT Summary list box on the Invoice Details frame.

(Contd) Step	Action
8	<p>In the Column Width field, enter 9 to set the width of this column in the VAT Summary list box.</p> <p>Note The column width should be wider than the actual content of the column. The extra space that is not used for the content of the column will provide white space separating the columns. If the width for each column is the exact width of the data, then there will not be space separating the columns of data.</p>
9	<p>From the Sequence drop-down list box, select 2 to indicate that this field will be the second column in the list box.</p>
10	<p>Click OK to exit the dialog.</p>

How to customize the STL NRIL element

The STL NRIL element (Number of Item Lines) contains the number of ILD segments with the VAT category code specified in the STL CD12:2 element. You will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

Use this procedure to make the field display-only and rename the field label for the Number of Item Lines field.

Step	Action
1	<p>Double-click the STL NRIL element.</p> <p>System Response The Element Properties dialog is displayed.</p>
2	<p>Select the Display tab.</p>
3	<p>Click the Displayed but not editable radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.</p>
4	<p>In the Label field, enter Number of Line Items to replace the existing field label.</p>
5	<p>Click OK to exit the dialog.</p>

How to customize the STL LVLA element

The STL LVLA element (Lines Sub-Total (Excluding VAT)) contains the subtotal for this line item, before VAT has been applied. The value in this field equals the total of the extended line cost (in the ILD:2 LEXC element) for line items with this VAT category code. The EDI data will be formatted in N2 format (formatted with an implicit decimal point and two decimal places), but you want the lines subtotal (excluding VAT) to be displayed in the translation object in R2 format (formatted with an explicit decimal point).

Therefore, you will change the screen format to reflect how you want the amount to be formatted in the translation object.

You will create a list box definition for this element to include the lines subtotal (excluding VAT) in the VAT Summary list box on the Invoice Details frame. You will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

Use this procedure to change the screen format, make the field display-only, rename the field label, and create the list box definition for the Lines Sub-Total (Excluding VAT) field:

Step	Action
1	Double-click the STL LVLA element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	From the Form Format drop-down list box, select R2 to indicate that this field will display a number with an explicit decimal point and up to two decimal places.
4	Select the Display tab.
5	Click the Displayed but not editable radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
6	In the Label field, enter Lines Subtotal (Excluding VAT) to replace the existing field label. (Making these slight changes to the field label maintains the consistency of labelling in this form.)
7	Select the Summary List tab.
8	Click the Display this field in summary list check box to turn this option on. The value in the Lines Subtotal (Excluding Vat) field will be displayed in a column in the VAT Summary list box on the Invoice Details frame.
9	In the Column Width field, enter 12 to set the width of this column in the VAT Summary list box. Note You do not need to make the column width for this field wider than the actual content of the column. The data from this field will form the last column in the list box, and you do not need to leave white space between the last column and the side of the list box.
10	From the Sequence drop-down list box, select 3 to indicate that this field will be the third column in the list box.

(Contd) Step	Action
11	Click OK to exit the dialog.

How to customize the STL EVLA element

The STL EVLA element (Extended Sub-Total Amount (Excluding VAT)) contains the extended subtotal before the VAT has been applied. In this tutorial, the value in the STL EVLA element equals the value in the STL LVLA element (because we are not using settlement discounts in this tutorial). For this reason, you do not need to display the STL EVLA element (the STL LVLA element *will* be displayed). Therefore, you will prevent this field from being displayed in the screen entry translation object, since users will not need to enter or view a value in this field (the value will be assigned in the extended rule you add later in this tutorial in the INVOIC file).

Use this procedure to hide the Extended Sub-Total Amount (Excluding VAT) field.

Step	Action
1	Double-click the STL EVLA element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	Click the Hidden radio button to prevent the field from being displayed in the translation object.
4	Click OK to exit the dialog.

How to customize the STL ASDA element

The STL ASDA element (Extended Sub-Total Amount (After Settlement Discount Has Been Applied)) contains the extended subtotal amount before VAT has been applied. In this tutorial, the value in the STL ASDA element equals the value in the STL EVLA element (which is equal to the STL LVLA element), because we are not using settlement discounts in this tutorial. For this reason, you do not need to display the STL ASDA element (the STL LVLA element *will* be displayed). Therefore, you will prevent this field from being displayed in the screen entry translation object, since users will not need to enter or view a value in this field (the value will be assigned in the extended rule you add later in this tutorial in the INVOIC file).

Use this procedure to hide the Extended Sub-Total Amount (After Settlement Discount Has Been Applied) field.

Step	Action
1	Double-click the STL ASDA element. System Response The Element Properties dialog is displayed.

Step	Action
2	Select the Display tab.
3	Click the Hidden radio button to prevent the field from being displayed in the translation object.
4	Click OK to exit the dialog.

How to customize the STL VATA element

The STL VATA element (VAT Amount Payable) contains the VAT amount at the quoted VAT rate. The EDI data will be formatted in N2 format (formatted with an implicit decimal point and two decimal places), but you want the VAT amount payable to be displayed in the translation object in R2 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the amount to be formatted in the translation object. In addition, you will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

Use this procedure to change the screen format, make the field display-only, and rename the field label for the VAT Amount Payable field.

Step	Action
1	Double-click the STL VATA element. System Response The Element Properties dialog is displayed.
2	From the Form Format drop-down list box, select R2 to indicate that this field will display a number with an explicit decimal point and up to two decimal places.
3	Select the Display tab.
4	Click the Display radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
5	In the Label field, enter VAT Amount Payable (note that “VAT” contains all capital letters) to replace the existing field label. Making these slight changes to the field label maintains the consistency of labelling in this form.
6	Click OK to exit the dialog.

How to customize the STL APSI element

The STL APSI element (Payable Sub-Total Amount Including Settlement Discount) contains the amount after VAT has been applied. The value in this element equals the sum of the values in the STL ASDA and STL VATA elements. The EDI data will be formatted in N2 format (formatted with an implicit decimal point and three decimal places), but you want the VAT amount payable to be displayed in the translation object in R2 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the amount to be formatted in the translation object. In addition, you will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

Use this procedure to change the screen format, make the field display-only, and rename the field label for the Payable Sub-Total Amount Including Settlement Discount field.

Step	Action
1	Double-click the STL APSI element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	From the Form Format drop-down list box, select R2 to indicate that this field will display a number with an explicit decimal point and up to two decimal places.
4	Select the Display tab.
5	Click the Display radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
6	In the Label field, enter Payable Subtotal (Inc. Sett. Disc.) to replace the existing field label.
7	Click OK to exit the dialog.
8	Click Generate Layout on the Main Toolbar to refresh the display of the screen entry form.

Customizing the TLR segment

The TLR segment (Invoice Trailer) contains the total invoice amounts. All monetary values in this segment are in pounds. You will use an extended rule to perform the calculations that will be displayed in the fields in the TLR segment. Screen entry translation object users will be able to view the values in these fields (on the Invoice Details frame), but will not be able to change the values. See *Producing the VAT Summary and the Invoice Trailer* on page 3 - 105 for details on how to add the appropriate extended rule.

Customizing the TLR NSTL element

The TLR NSTL element (Number of Total Segments) contains the number of STL segments in the invoice. You do not need to display the this element, as the screen entry translation object users will not need to enter or view a value in this field.

Use this procedure to hide the Number of Total Segments field.

Step	Action
1	Double-click the TLR NSTL element. System Response The Element Properties dialog is displayed.
2	Select the Display tab.
3	Click the Hidden radio button to prevent the field from being displayed in the translation object.
4	Click OK to exit the dialog.

Customizing the TLR LVLT element

The TLR LVLT element (Lines Total Amount (Excluding VAT)) contains the sum of the STL LVLA elements in the preceding STL segments (before VAT is applied). The EDI data will be formatted in N2 format (formatted with an implicit decimal point and two decimal places), but you want the total amount (excluding VAT) to be displayed in the translation object in R2 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the amount to be formatted in the translation object. In addition, you will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

Use this procedure to change the screen format, make the field display-only, and rename the field label for the Lines Total Amount (Excluding VAT) field.

Step	Action
1	Double-click the TLR LVLT element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	From the Form Format drop-down list box, select R2 to indicate that this field will display a number with an explicit decimal point and up to two decimal places.
4	Select the Display tab.

(Contd) Step	Action
5	Click the Display radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
6	In the Label field, enter Invoice Amount (Excluding VAT) to replace the existing field label.
7	Click OK to exit the dialog.

How to customize the TLR EVLT element

The TLR EVLT element (Total Extended Amount Ex Settlement Discount) contains the sum of the STL EVLA elements in the preceding STL segments (before VAT is applied). The EDI data will be formatted in N2 format (formatted with an implicit decimal point and two decimal places), but you want the total amount (excluding settlement discount and VAT) to be displayed in the translation object in R2 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the amount to be formatted in the translation object. In addition, you will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

Use this procedure to change the screen format, make the field display-only, and rename the field label for the Total Extended Amount Ex Settlement Discount field.

Step	Action
1	Double-click the TLR EVLT element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	From the Form Format drop-down list box, select R2 to indicate that this field will display a number with an explicit decimal point and up to two decimal places.
4	Select the Display tab.
5	Click the Display radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
6	In the Label field, enter Invoice Amount (Ex. Settlement Disc.) to replace the existing field label.
7	Click OK to exit the dialog.

How to customize the TLR ASDT element

The TLR ASDT element (Total Amount Exc VAT Inc Sett) contains the sum of the STL ASDA elements in the preceding STL segments (before VAT is applied). The EDI data will be formatted in N2 format (formatted with an implicit decimal point and two decimal places), but you want the total amount (excluding settlement discount and VAT) to be displayed in the translation object in R2 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the amount to be formatted in the translation object. In addition, you will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

Use this procedure to change the screen format, make the field display-only, and rename the field label for the Total Amount Exc VAT Inc Sett field.

Step	Action
1	Double-click the TLR ASDT element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	From the Screen Format drop-down list box, select R2 to indicate that this field will display a number with an explicit decimal point and up to two decimal places.
4	Select the Display tab.
5	Click the Display radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
6	In the Label field, enter Invoice Amount (Ex. VAT Inc. Sett.) to replace the existing field label.
7	Click OK to exit the dialog.

How to customize the TLR TVAT element

The TLR TVAT element (Total VAT Amount Payable) contains the sum of the STL VATA elements in the preceding STL segments. The EDI data will be formatted in N2 format (formatted with an implicit decimal point and two decimal places), but you want the total amount to be displayed in the translation object in R2 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the amount to be formatted in the translation object. In addition, you will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

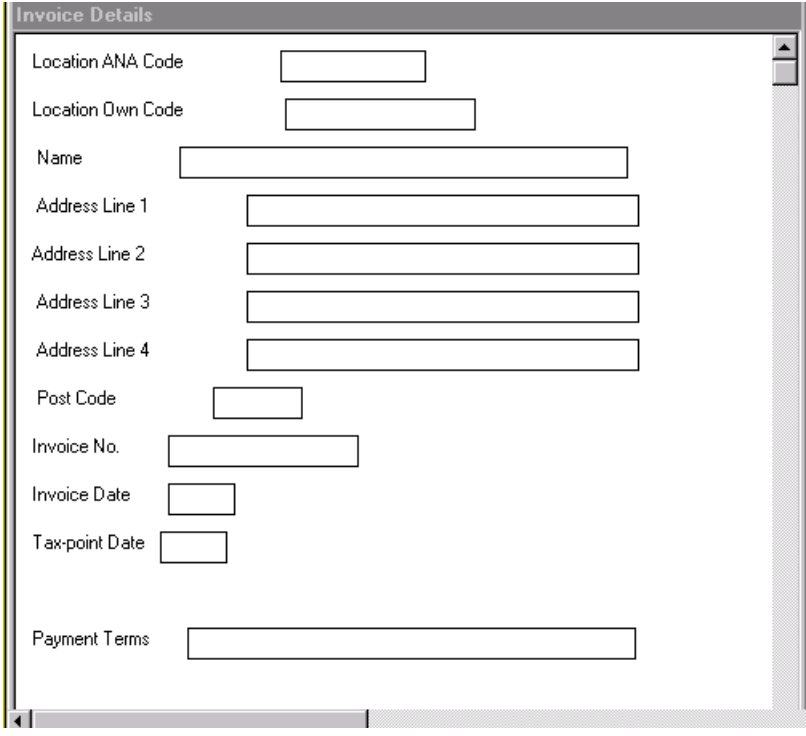
Use this procedure to change the screen format, make the field display-only, and rename the field label for the Total VAT Amount Payable field.

Step	Action
1	Double-click the TLR TVAT element. System Response The Element Properties dialog is displayed.
2	Select the Validation tab.
3	From the Form Format drop-down list box, select R2 to indicate that this field will display a number with an explicit decimal point and up to two decimal places.
4	Select the Display tab.
5	Click the Display radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
6	In the Label field, enter VAT Total to replace the existing field label.
7	Click OK to exit the dialog.

How to customize the TLR TPSI element

The TLR TPSI element (Total Payable Inc. Settlement) contains the sum of the STL APSI elements in the preceding STL segments. The EDI data will be formatted in N2 format (formatted with an implicit decimal point and two decimal places), but you want the total amount to be displayed in the translation object in R2 format (formatted with an explicit decimal point). Therefore, you will change the screen format to reflect how you want the amount to be formatted in the translation object. In addition, you will make this field display-only, as the screen entry translation object users who use this invoice translation object should be able to view, but not change, the value in this field. Also, you will rename the field label.

Use this procedure to change the screen format, make the field display-only, and rename the field label for the Total Payable Inc. Settlement field.

Step	Action
1	Double-click the TLR TPSI element. System Response The Element Properties dialog is displayed.
2	From the Screen Format drop-down list box, select R2 to indicate that this field will display a number with an explicit decimal point and up to two decimal places.
3	Select the Display tab.
4	Click the Display radio button to make this field display-only. Users will be able to read the data in this field, but will not be able to enter or change a value in this field.
5	In the Label field, enter Total Invoice Amount (Inc. Sett. Disc.) to replace the existing field label.
6	Click OK to exit the dialog.
7	Click Generate Layout on the Main Toolbar to refresh the display of the screen entry form. The section of the Invoice Details frame that contains the fields in the TLR segment now should look like this: 

Producing the VAT Summary and the Invoice Trailer

Overview

Now that you have customized the individual elements in the invoice, one last customizing task remains: to produce the VAT summary and invoice trailer. The VAT summary and invoice trailer calculations include calculating the totals for the invoice for each of the different VAT rates and grouping the totals by VAT rate. To produce the VAT summary calculations for the invoice, you will use an extended rule to define operations with the Sterling Gentran:Server proprietary programming language.

There are two sections for extended rules: a **declarations** section and a **statements** section. The declarations section is used to declare the names and types of any variables you will use. The statements section is where you define the operations that you want the rule to execute. Within the statements section, you can leave blank lines to visually separate portions of an extended rule. (Blank lines are used more often in complex extended rules, rather than in simple one- or two-line extended rules.) Leaving a blank line does not affect the execution of extended rules.

As you define the operations for the VAT summary calculations, you will enter many lines of rules in the Loop Level Extended Rules dialog. This section describes each of the individual operations that you will define, and explains what you should enter in order to execute each operation.

Note

As an alternative to entered the extended rule yourself, you may copy the extended rule from the example form provided with the tutorial data in the C:\GENSRVNT\TUTORIALS subfolder.

You will define the VAT summary and invoice trailer calculations on the INVOIC group so that the calculations are run when the screen entry translation object users in Sterling Gentran:Server either calculates or saves the file. After Sterling Gentran:Server stores the data in the fields, the system will run the calculations and store them in the appropriate VAT summary and invoice trailer fields. The extended rule will be used with the On Store function so the system will perform the calculations last, after the group is stored.

Procedure Use this procedure to access the Loop Level Extended Rules dialog to define the operations for the VAT summary calculations.

Step	Action
1	Click the INVOIC EDI file icon with the right mouse button to access the shortcut menu.
2	Select Extended Rules from the shortcut menu. System Response The Loop Level Extended Rules dialog is displayed.
3	Click the On Store radio button to indicate that you want the rule to be executed when you save or recalculate the screen entry translation object. When the screen entry users save or recalculate the Invoice Details frame in Sterling Gentran:Server, all On Store extended rules in the Loop Level Extended Rules dialog will be executed.

How to declare the variables

Before you begin defining any operations in the statements section of the extended rule, you must first define the variables that you will use in the extended rule. Variables consist of a name and a data type, and they are used to store values.

For this extended rule, you will use these four variables (all of which have a data type of integer).

- **i** (temporary variable assigned any value you define in the extended rule)
- **j** (another temporary variable assigned any value you define in the extended rule)
- **ildlimit** (temporary variable that contains the number of ILD segments)
- **stllimit** (temporary variable that contains the number of STL segments)

Use this procedure to declare the four integer variables listed above.

Step	Action
1	On the first line in the Editor list box, enter the following declaration: integer i,j,ildlimit,stllimit;
2	Press Enter twice to insert a blank line after the declarations section. Note It is not necessary to include a blank line after the declaration and statement sections. However, doing so may improve readability of the extended rule.
3	You are now ready to define the statements section of the extended rule.

How to count the STL segments and delete them

The STL segment is a repeating segment, so there is one STL segment for each VAT code used in the invoice. You want Sterling Gentran:Server to count the STL segments used in the invoice (the value from counting the STL segments will be placed in variable “i”). Next, you want the system to visit each STL segment and delete the segment. The reason you want the system to delete the STL segments is that the system makes the assumption that the form has been modified and, therefore, deletes the STL segments to reset the form before performing any calculations relating to the STL segments. Finally, you want the system to initialize the value of the last STL segment to zero.

Use this procedure to define a statement that counts the STL segments and deletes them, then initializes the value of the last STL to zero.

Step	Action
1	On the next line in the Editor list box, enter the following statement: <pre>i=count(\$STL[*]); while i > 0 do begin delete(\$STL[i]); i=i-1; end stllimit = 0;</pre>
2	Press Enter twice to insert a blank line after the statement. Note It is not necessary to include a blank line after this statement. However, doing so may improve readability of the extended rule.

How to count the ILD groups

The ILD group is a repeating group, so there is one ILD group for each line item in the invoice. You want Sterling Gentran:Server to count the ILD groups used in the invoice (the value from counting the ILD groups will be placed in variable “ildlimit”).

Use this procedure to define a statement that counts the ILD groups.

Step	Action
1	On the next line in the Editor list box, enter the following statement: <pre>ildlimit = count(\$ILD[1][*]);</pre>
2	Press Enter twice to insert a blank line after the statement. Note It is not necessary to include a blank line after this statement. However, doing so may improve readability of the extended rule.

How to find compatible VAT codes in the STL segments

Now that Sterling Gentran:Server has counted (and deleted) the STL segments and counted the ILD groups in the invoice, you want the system to determine which VAT code is used for each line item (each instance of the ILD group). Next, you want to group the line items that use the same VAT code so you can determine the VAT rate percentage (based on each VAT code) and then calculate the total VAT payable for each group of line items.

If the system finds a VAT code that is the same in both an ILD group and an STL segment (compatible VAT codes), then you want the system to execute the following operations:

- Add the extended line cost (ILD:2 LEXC element) into the lines subtotal (ILD:2 LVLA element) to add the line item from the ILD group to the compatible STL segment
- Increment a counter in the STL segment of how many of the existing ILD segments are compatible with that STL segment

If the system does not find an STL segment with the same VAT code as the ILD group it is visiting, then it executes the following operations:

- Creates an STL segment with the VAT code of the current ILD group
- Sets the number of STL segments (STL SEQA:7 element) to be the number of the last STL segment (the current segment, which was just created)
- Sets the VAT rate percentage of the STL segment (STL VATP:2 element) to equal the VAT rate percentage of the ILD group (ILD:2 VATP element)
- Sets the VAT code of the STL segment (STL CD12:2 element) to equal the VAT code of the ILD group (ILD:2 CD12 element)
- Sets the lines subtotal of the STL segment (STL LVLA element) to be the extended line cost of the ILD group (ILD:2 LEXC element)
- Sets the number of line items to be "1" (STL NRIL element)
- Sets the number of STL segments to be the number of the current STL segment (which was just created)

Finally, you want the system to repeat the process described above (finding compatible VAT codes in the STL segments and ILD segments) until it has no more ILD groups to count (each line item has been assessed).

Procedure Use this procedure to define a statement that groups line items with the same VAT code.

Step	Action
1	<p>On the next line in the Editor list box, enter the following statement:</p> <pre> i=1; while i <= ildlimit do begin j=1; while j <= stllimit do begin if \$ILD[1][i].#CD12 = \$STL[j].#CD12:2 then begin \$STL[j].#LVLA = \$STL[j].#LVLA + \$ILD[1][i].#LEXC; \$STL[j].#NRIL = \$STL[j].#NRIL + 1; break; end end j=j+1; end if j > stllimit then begin \$STL[j].#SEQA:7 = j; \$STL[j].#VATP:2 = \$ILD[1][i].#VATP; \$STL[j].#CD12:2 = \$ILD[1][i].#CD12; \$STL[j].#LVLA = \$ILD[1][i].#LEXC; \$STL[j].#NRIL = 1; stllimit = stllimit + 1; end end i=i+1; end </pre>
2	<p>Press Enter twice to insert a blank line after the statement.</p> <p>Note It is not necessary to include a blank line after this statement. However, doing so may improve readability of the extended rule.</p>

How to calculate the VAT amount and producing the invoice trailer

Up to this point, the extended rule you have defined instructs Sterling Gentran:Server to calculate the totals for the invoice for each of the different VAT rates. Now you will define a rule that calculates the total VAT amount and produces the invoice trailer.

First, the system will initialize the lines total amount (TLR LVLT element) and the total VAT amount payable (TLR TVAT element) to zero. Next, the system will perform the following calculations for every STL segment:

- Set the VAT amount payable (STL VATA element) equal to the product of the lines subtotal (STL LVLA element) and the VAT rate percentage (STL VATP:2 element), divided by one hundred (to calculate the VAT payable).
- Set the extended subtotal amount (STL EVLA element) equal to the lines subtotal (STL LVLA element), because you are not using settlement discounts in this tutorial.
- Set the extended subtotal amount (STL ASDA element) equal to the lines subtotal (STL LVLA element), because you are not using settlement discounts in this tutorial.

- Set the payable subtotal amount (STL APSI element) equal to the sum of the lines subtotal (STL LVLA element) and the VAT amount payable (STL VATA element).
- Set the lines total amount (TLR LVLT element) equal to the sum of the lines total amount (TLR LVLT element) and the extended subtotal amount (STL EVLA element).
- Set the total VAT amount payable (TLR TVAT element) equal to the sum of the total VAT amount payable (TLR VATA element) and the VAT amount payable (STL VATA element).

Finally, you want the system to repeat the calculations described above until all STL segments have been processed.

Procedure Use this procedure to define a statement that groups the invoice totals by VAT rate.

Step	Action
1	<p>On the next line in the Editor list box, enter the following statement:</p> <pre>#LVLV = 0; #TVAT = 0; j=1; while j <= stllimit do begin \$STL[j].#VATA = (\$STL[j].#LVLA * \$STL[j].#VATP:2) / 100.0; \$STL[j].#EVLA = \$STL[j].#LVLA; \$STL[j].#ASDA = \$STL[j].#LVLA; \$STL[j].#APSI = \$STL[j].#LVLA + \$STL[j].#VATA; #LVLV = #LVLV + \$STL[j].#LVLA; #TVAT = #TVAT + \$STL[j].#VATA; j=j+1; end</pre>
2	<p>Press Enter twice to insert one blank line after the statement.</p> <p>Note It is not necessary to include a blank line after this statement. However, doing so may improve readability of the extended rule.</p>

Completing the trailer calculations

The final operation that Sterling Gentran:Server will execute when processing the extended rule is to calculate the line value total and VAT. You want the system to perform these calculations:

- Set the number of total segments (TLR NSTL element) equal to the count of STL segments.
- Set the total extended amount (TLR EVLT element) equal to the lines total amount (TLR LVLT element).
- Set the total amount (TLR ASDT element) equal to the lines total amount (TLR LVLT element).
- Set the total amount payable (TLR TPSI element) equal to the sum of the lines total amount (TLR LVLT element) and the total VAT amount payable (TLR TVAT element).

To calculate the line value total and VAT, on the next line in the Editor list box, enter the following statement:

```
#NSTL = stllimit;
#EVLT = #LVLT;
#ASDT = #LVLT;
#TPSI = #LVLT + #TVAT;
```

Checking what you entered

Now that you have entered the entire extended rule that will be processed for the INVOIC group, your extended rule should look like this:

```
integer i,j,ildlimit,stllimit;

i=count($STL[*]);
while i > 0 do
begin
  delete($STL[i]);
  i=i-1;
end
stllimit = 0;

ildlimit = count($ILD[1][*]);

i=1;
while i <= ildlimit do
begin
  j=1;
  while j <= stllimit do
  begin
    if $ILD[1][i].#CD12 = $STL[j].#CD12:2 then
    begin
      $STL[j].#LVLA = $STL[j].#LVLA + $ILD[1][i].#LEXC;
      $STL[j].#NRIL = $STL[j].#NRIL + 1;
      break;
    end
    j=j+1;
  end
end

if j > stllimit then
begin
  $STL[j].#SEQA:7 = j;
  $STL[j].#VATP:2 = $ILD[1][i].#VATP;
```

```

        $STL[j].#CD12:2 = $ILD[1][i].#CD12;
        $STL[j].#LVLA = $ILD[1][i].#LEXC;
        $STL[j].#NRIL = 1;
        stllimit = stllimit + 1;
    end
    i=i+1;
end

#LVL T = #TVAT = 0;
j=1;
while j <= stllimit do
begin
    $STL[j].#VATA = ($STL[j].#LVLA * $STL[j].#VATP:2) / 100.0;
    $STL[j].#EVLA = $STL[j].#LVLA;
    $STL[j].#ASDA = $STL[j].#LVLA;
    $STL[j].#APSI = $STL[j].#LVLA + $STL[j].#VATA;

    #LVL T = #LVL T + $STL[j].#LVLA;
    #TVAT = #TVAT + $STL[j].#VATA;

    j=j+1;
end

#NSTL = stllimit;
#EVL T = #LVL T;
#ASDT = #LVL T;
#TPSI = #LVL T + #TVAT;

```

How to compile the extended rule

Now that you have entered the extended rule to perform all the INVOIC group-level calculations for the invoice, you should compile the extended rule to verify that you have entered the rule correctly.

Use this procedure to compile the extended rule.

Step	Action
1	Click Compile to compile the extended rule. Note If you receive any errors or warnings when you compile the rule, verify that you entered the rule exactly as it is written in this tutorial. After you make any changes to the extended rule to correct it, click Compile again. Repeat this process until there are no errors generated.
2	Click OK to add the extended rule to the form and exit the Loop Level Extended Rules dialog.
3	Click Save from the File menu to save the form.

Now that you have customized all of the elements used in this invoice, you are ready to format the fields and labels to make the frames more consistent and visually attractive.

Format the Screen Entry Form

Overview

Introduction

In the previous section of this tutorial, you customized the screen entry form for a TRADACOMS ANA001 INVOIC release 9 invoice that your users will use to enter data to invoice Pet Zone for items that were shipped to them. After successfully customizing the fields and elements of the screen entry form, you are ready to format the layout of the form.

This section explains how to format the form, field by field.

How to resize the invoice details frame

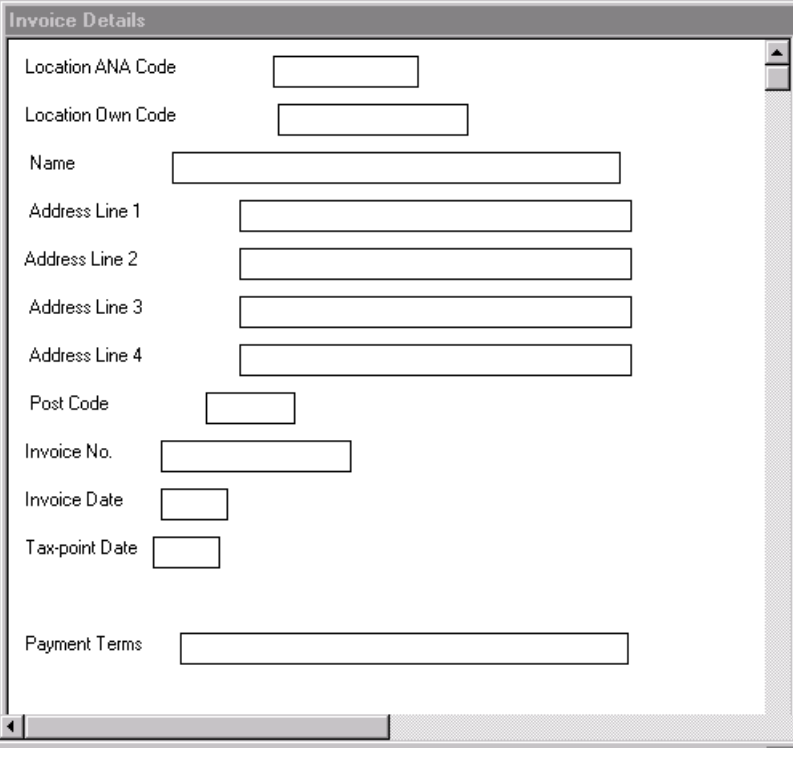
When a form is compiled into a translation object, the fields are arranged according to how the frames and the fields contained in them were arranged when the form was compiled. You should eliminate unnecessary space as you arrange the fields in each frame.

Important

When you resize the frames of a screen entry form, you must resize based on the resolution of the target monitor (e.g. the monitor on which the end user will view the translation object). For example, if you size the frames of a screen entry form on a Super VGA monitor, the compiled translation object may not fit in the display area of a VGA monitor.

Use this procedure to resize the Invoice Details frame.

Step	Action
1	Click the INVOIC file icon to display the Invoice Details frame in the Layout Window. Note When the form is generated, the upper left corner of each frame in the form is placed in the upper left corner of the Layout Window.
2	To display more of the form on your screen, click and drag the centre bar between the EDI File Format Window and the Layout Window to the left until the Layout Window is wide enough to display as much of the form as you want to view.

(Contd) Step	Action
3	<p>To resize the Invoice Details frame, click and drag the right side of the frame approximately to the 14 cm mark on the horizontal ruler so that the form is wide enough to format the fields according to the instructions in this tutorial.</p> <p>The Invoice Details frame now should look like this:</p>  <p>The screenshot shows a window titled "Invoice Details" containing the following fields:</p> <ul style="list-style-type: none">Location ANA Code: <input type="text"/>Location Own Code: <input type="text"/>Name: <input type="text"/>Address Line 1: <input type="text"/>Address Line 2: <input type="text"/>Address Line 3: <input type="text"/>Address Line 4: <input type="text"/>Post Code: <input type="text"/>Invoice No.: <input type="text"/>Invoice Date: <input type="text"/>Tax-point Date: <input type="text"/>Payment Terms: <input type="text"/>

Arranging the Fields on the Invoice Details Frame

Overview You will begin formatting the screen entry form by arranging the fields on the Invoice Details frame. You will place the fields in the translation object in a logical order, then align the fields to give the frame a consistent and orderly appearance. When you have finished arranging the fields, your Invoice Details frame should look like the one in the example below (only part of the frame is shown below).

The screenshot shows a window titled "Invoice Details" with the following fields:

- Invoice No.
- Invoice Date
- Customer's P.O. No.
- P.O. Date
- Delivery Note Number
- Delivery Date
- Taxpoint Date
- CUSTOMER DETAILS**
- Location ANA Code
- Location Own Code
- Name
- Address Line 1
- Address Line 2
- Address Line 3
- Address Line 4
- Postal Code
- Payment Terms
- Invoice Notes

By default, each field and its associated label are displayed on their own line. However, it is common for invoices to place two or more fields on a line.

You prevented some of the field labels from being displayed (by removing the field label in the Label field of the Display Properties dialog). For these fields, the fields will be displayed on your screen entry form, but their associated labels are not displayed.

Note

If you forget which unlabelled field contains what data, you can click the field. Its associated element will be highlighted in the EDI File Format Window, providing you with a description of the field.

How to resize, move, and align the fields

Use this procedure to resize, move, and align the fields on the Invoice Details frame of the screen entry form:

Note

If a field and its corresponding field label move together, the Lock Labels to Fields option is turned on. Click the Lock Labels button on the Main Toolbar to turn off the Lock Labels option.

Step	Action
1	Click and drag the bottom of the frame to the bottom of the Forms window, so that as many of the fields on the frame are displayed as possible.
2	<p>Select the following fields:</p> <p>Note To select more than one field, click the first field, then press CTRL and click the second field. Repeat the process of pressing CTRL and clicking the field for each subsequent field you want to select.</p> <ul style="list-style-type: none"> ▶ Location Own Code ▶ Name ▶ Invoice Date ▶ Tax-point Date ▶ P.O. Date ▶ Delivery Date <p>Note If any of these fields is not in the part of the Invoice Details frame that currently is displayed, then use the scroll bar to scroll down the frame until you locate the hidden field(s).</p>
3	<p>Select Size to Length from the Display menu. All selected fields will be resized to the lengths specified in the Display Length field of the Display Properties dialog for each field.</p> <p>Note If you accidentally format a form component in a way you did not intend, select Undo from the Display menu to undo your last formatting action.</p>
4	Select each field in the form individually and drag it closer to its respective label.

(Contd) Step	Action
5	<p>Select all of the items (fields, field labels, list boxes) on the frame and drag them a few centimetres lower on the frame. You will be arranging the fields at the top of the frame, so moving the fields and field labels out of the way initially will give you room to work with at the top of the frame.</p> <p>Note To select a group of items, click and drag the mouse diagonally across all the fields/labels you want to select. When you release the mouse button, all the fields and field labels completely included within the space formed by dragging the mouse will have handles, indicating they were selected.</p>
6	<p>Click the Lock Labels button on the Main Toolbar to turn on the Lock Labels function. When you select a field, its corresponding field label will be selected also.</p>
7	<p>Select the Invoice No. label and field and drag them to the upper left corner of the Invoice Details frame. (Their field labels will be selected, too, because you have the Lock Labels function turned on.)</p>
8	<p>Select the Invoice Date label and field and drag them to the upper right corner of the Invoice Details frame (at approximately 8 cm on the horizontal ruler).</p>
9	<p>Select the Tax-point Date label and field and drag them under the Invoice Date label and field.</p>
10	<p>Select the Customer's P.O. No. label and field and drag them under the Invoice No. label and field (but not on the same line as the Tax-point Date label and field).</p>
11	<p>Select the P.O. Date label and field and drag them below the Tax-point Date label and field.</p>
12	<p>Select the Delivery Note Number label and field and drag them below the Customer's P.O. No. label and field.</p>
13	<p>Select the Delivery Date label and field and drag them below the P.O. Date label and field.</p>
14	<p>Select the Location ANA Code label and field and drag them below the Delivery Note Number label and field (and indented about half a centimetre).</p> <p>Note You will add static text later in this tutorial to label all the fields providing customer details. Therefore, leave extra space between the Delivery Note Number and Delivery Date labels and fields, and the Location ANA Code and Location Own Code labels and fields, to insert the static text between them.</p>

(Contd) Step	Action
15	Select the Location Own Code label and field and drag them to the right of the Location ANA Code label and field (at approximately 7 cm on the horizontal ruler).
16	<p>Select the following fields and labels, and drag them below the Location ANA Code label and field:</p> <ul style="list-style-type: none"> ▶ Name ▶ Address Line 1 ▶ Address Line 2 ▶ Address Line 3 ▶ Address Line 4 ▶ Post Code
17	<p>Select the Payment Terms label and field and drag it below the Post Code field. (The left margin of the Payment Terms label should be aligned with the left margin of the Delivery Note Number label.)</p> <p>Note Leave extra space between the Post Code field and label, and the Payment Terms field and label, to designate the end of the Customer Details section.</p>
18	Select the Invoice Notes label and fields (there are four fields, three of which are unlabelled) and drag them below the Payment Terms label and field.
19	<p>Select the Line Items label and list box and drag them below the fourth Invoice Notes field (the second, third, and fourth Invoice Notes fields are unlabelled).</p> <p>Note Leave extra space above the Line Items field and list box to add column headings (using static text) to label the data in the list box.</p>
20	<p>Click and drag the right or left handle on the Line Items list box until the list box is approximately 11.25 cm wide. The list box must be at least 11.25 cm wide to be able to display all of the summary list data.</p> <p>Note Use the horizontal ruler to help you measure width.</p>
21	<p>Select the VAT Summary label and list box and drag them below the Line Items label and list box.</p> <p>Note Leave extra space above the VAT Summary field and list box to add column headings (using static text) to label the data in the list box.</p>

(Contd) Step	Action
22	Click and drag the right or left handle on the VAT Summary list box until the list box is approximately 4.5 cm wide. The list box must be approximately 4.5 cm wide to display all of the summary list data appropriately.
23	<p>Select the following fields and labels and drag them below the VAT Summary list box (so that the fields and labels are approximately centred horizontally on the frame):</p> <ul style="list-style-type: none"> ▶ Invoice Amount (Excluding VAT) ▶ Invoice Amount (Ex. Settlement Disc.) ▶ Invoice Amount (Ex. VAT Inc. VAT) ▶ VAT Total ▶ Total Invoice Amount (Inc. Sett. Disc.)
24	<p>Click the Lock Labels button on the Main Toolbar to turn off the Lock Labels function.</p> <p>Note To see fields that are not displayed currently on the frame, use the scroll bar to scroll down the frame.</p>

How to align the fields and field labels

Now that the fields in the Invoice Details frame are resized and moved to their proper locations, you can align the fields and labels.

Use this procedure to align the fields and field labels on the Invoice Details frame.

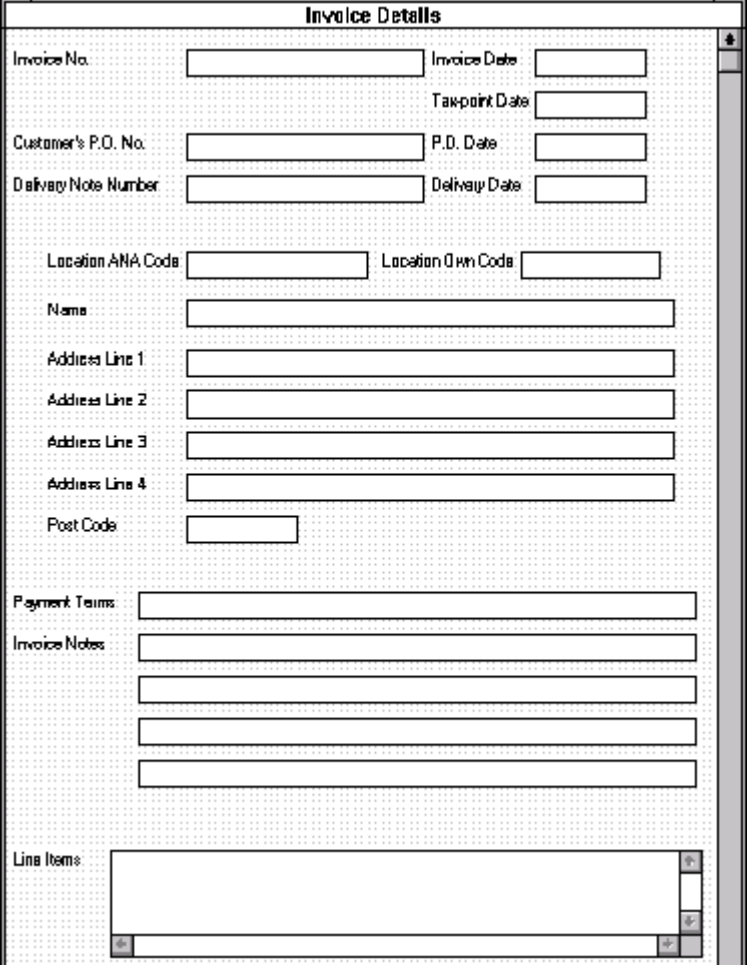
Step	Action
1	<p>Select the following field labels:</p> <ul style="list-style-type: none"> ▶ Invoice No. ▶ Customer's P.O. No. ▶ Delivery Note Number ▶ Payment Terms ▶ Invoice Notes ▶ Line Items ▶ VAT Summary <p>Note To select more than one field, click the first field, then press CTRL and click the second field. Repeat the process of pressing CTRL and clicking the field for each subsequent field you want to select.</p>

(Contd) Step	Action
2	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected field labels are aligned.
3	<p>Select the following field labels:</p> <ul style="list-style-type: none"> ▶ Invoice Date ▶ Tax-point Date ▶ P.O. Date ▶ Delivery Date <p>Note To select a group of items, click and drag the mouse diagonally across all the fields/labels you want to select.</p>
4	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected field labels are aligned.
5	<p>Select the following field labels:</p> <ul style="list-style-type: none"> ▶ Location ANA Code ▶ Name ▶ Address Line 1 ▶ Address Line 2 ▶ Address Line 3 ▶ Address Line 4 ▶ Post Code
6	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected field labels are aligned.
7	<p>Select the following field labels:</p> <ul style="list-style-type: none"> ▶ Invoice Amount (Excluding VAT) ▶ Invoice Amount (Ex. Settlement Disc.) ▶ Invoice Amount (Ex. VAT Inc. Sett.) ▶ VAT Total ▶ Total Invoice Amount (Inc. Sett. Disc.)
8	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected field labels are aligned.

(Contd) Step	Action
9	<p>Select the following fields:</p> <ul style="list-style-type: none"> ▶ Invoice No. ▶ Customer's P.O. No. ▶ Delivery Note Number ▶ Location ANA Code ▶ Name ▶ Address Line 1 ▶ Address Line 2 ▶ Address Line 3 ▶ Address Line 4 ▶ Post Code <p>Note Select the Location ANA Code field last, so that it is the <i>reference</i>. The reference is the item (field, field label, list box, or static text) relative to which all other selected items are formatted. The reference is indicated by an outline of diagonal lines, whereas all other selected items are outlined by a solid line. The last item selected in a group of selected items is the reference.</p>
10	<p>Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected fields are aligned.</p>
11	<p>Select the Line Items and VAT Summary list boxes.</p> <p>Note Select the VAT Summary field last, so that it is the reference.</p>
12	<p>Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected list boxes are aligned.</p>
13	<p>Select the following fields:</p> <ul style="list-style-type: none"> ▶ Invoice Date ▶ Tax-point Date ▶ P.O. Date ▶ Delivery Date <p>Note Select the Tax-point Date field last, so that it is the reference.</p>
14	<p>Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected fields are aligned.</p>

(Contd) Step	Action
15	Select the following fields: <ul style="list-style-type: none"> ▶ Payment Terms ▶ Invoice Notes (all four fields) Note Select the Payment Terms field last, so that it is the reference.
16	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected fields are aligned.
17	Select the following fields: <ul style="list-style-type: none"> ▶ Invoice Amount (Excluding VAT) ▶ Invoice Amount (Ex. Settlement Disc.) ▶ Invoice Amount (Ex. VAT Inc. Sett.) ▶ VAT Total ▶ Total Invoice Amount (Inc. Sett. Disc.) Note Select the Total Invoice Amount (Inc. Sett. Disc.) field last, so that it is the reference.
18	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected fields are aligned.

(Contd) Step	Action
19	<p>To align the tops of all of the field labels, fields, and list boxes, select each row of items (one row at a time), select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The items in each row are listed below:</p> <ul style="list-style-type: none"> ▶ Invoice No. label and field, Invoice Date label and field ▶ Tax-point Date label and field ▶ Customer's P.O. No. label and field, P.O. Date label and field ▶ Delivery Note Number label and field, Delivery Date label and field ▶ Location ANA Code label and field, Location Own Code label and field ▶ Name label and field ▶ Address Line 1 label and field ▶ Address Line 2 label and field ▶ Address Line 3 label and field ▶ Address Line 4 label and field ▶ Post Code label and field ▶ Payment Terms label and field ▶ Invoice Notes label and field (first Invoice Notes field only) ▶ Line Items label and list box ▶ VAT Summary label and list box ▶ Invoice Amount (Excluding VAT) label and field ▶ Invoice Amount (Ex. Settlement Disc.) label and field ▶ Invoice Amount (Ex. VAT Inc. Sett.) label and field ▶ VAT Total label and field ▶ Total Invoice Amount (Inc. Sett. Disc.) label and field

(Contd) Step	Action
20	<p>The Invoice Details frame now should look like this:</p>  <p>Note Depending on the size of your monitor, you will see more or fewer of the fields in the example above. To see fields that are not displayed currently on the frame, use the scroll bar to scroll down the frame.</p>

Adding static text to the frame

You will add static text (text that is always included in the screen entry template) to the Invoice Details frame for these three purposes.

- To label the area of the frame containing customer detail fields
- To add column headings to the Line Items list box
- To add column headings to the VAT Summary list box

When you moved the fields on the frame, you already left space in the appropriate locations for the static text. In this section of the tutorial, you will add the static text and move it to the proper locations in the frame.

How to add the customer details label

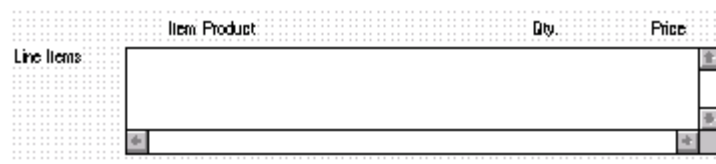
Use this procedure to add static text that will label the group of customer detail fields on the frame.

Step	Action
1	Click Add Text on the Main Toolbar. Text is added to the current frame, displayed in the upper left corner of the frame. If the template is larger than the frame (there is a scroll bar on the right side of the frame), the static text is displayed in the upper left corner of the part of the template that is displayed, not at the top of the template.
2	Select the new text field and enter CUSTOMER DETAILS , all in capital letters. The Text Properties dialog is displayed as you are typing. Click OK to add the text. System Response The text you added is displayed in the upper left corner of the frame.
3	Select the CUSTOMER DETAILS static text and drag it below the Delivery Note Number label and field (The left margin of the static text should be aligned with the left margin of the Delivery Note Number label.).

How to add column headings to the line items list box

Sterling Gentran:Server labels the fields on the Line Items frame, but does not label the column headings for the Line Items list box on the Invoice Details frame. The Line Items list box displays the information entered into the fields on the Line Items frame. To label the columns in the Line Items list box, you must add the column headings with static text.

After you add the column headings and move each column heading to its proper location, the Line Items list box and the column headings should look like this:



Use this procedure to add and position the column headings.

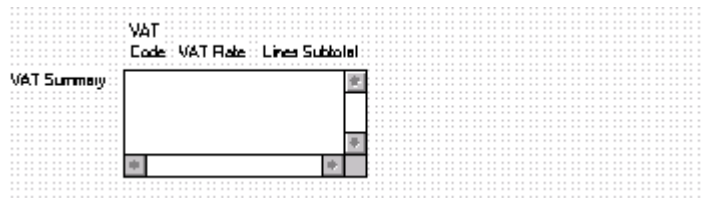
Step	Action
1	Click Add Text on the Main Toolbar. System Response Text is added to the current frame, displayed in the upper left corner of the frame. If the template is larger than the frame (there is a scroll bar on the right side of the frame), the static text is displayed in the upper left corner of the part of the template that is displayed, not at the top of the template.

(Contd) Step	Action
2	Select the new text field and enter Item . The Text Properties dialog is displayed as you are typing. Click OK to add the text.
3	Click and drag it to above the Line Items list box, starting about 1 cm from the left margin of the list box (so it looks like the example on 3 - 125).
4	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
5	Select the new text field and enter Product . The Text Properties dialog is displayed as you are typing. Click OK to add the text.
6	Click and drag it to above the Line Items list box, to the right of the Item column heading.
7	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
8	Select the new text field and enter Qty. (note the full stop in the text). The Text Properties dialog is displayed as you are typing. Click OK to add the text.
9	Click and drag it to above the Line Items list box, nearly 8 cm. from the left margin of the list box.
10	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
11	Select the new text field and enter Price . The Text Properties dialog is displayed as you are typing. Click OK to add the text.
12	Click and drag it to above the Line Items list box, near the right margin of the list box.
13	<p>To ensure that the column headings (static text) you just added are aligned properly, select all the static text you just added (Item, Qty., Product, Price). Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu.</p> <p>Note To select a group of items, click and drag the mouse diagonally across all the items you want to select.</p>

Adding column headings to the vat summary list box

Sterling Gentran:Server labels the fields on the VAT Summary frame, but does not label the column headings for the VAT Summary list box on the Invoice Details frame. The VAT Summary list box displays the information entered into the fields on the Line Items frame. To label the columns in the VAT Summary list box, you must add the column headings with static text.

After you add the column headings and move each column heading to its proper location, the VAT Summary list box and the column headings should look like this:



Use this procedure to add and position the column headings.

Step	Action
1	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
2	Select the new text field and enter Code . The Text Properties dialog is displayed as you are typing. Click OK to add the text.
3	Click and drag it to above the VAT Summary list box, immediately to the right of the left margin of the VAT Summary list box (so it looks like the example on 3 - 127).
4	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
5	Select the new text field and enter VAT . The Text Properties dialog is displayed as you are typing. Click OK to add the text.
6	Click and drag it to above the "Code" static text.
7	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
8	Select the new text field and enter VAT Rate . The Text Properties dialog is displayed as you are typing. Click OK to add the text.
9	Click and drag it to above the VAT Summary list box, about 1 cm from the left margin of the list box.
10	Click Add Text on the Main Toolbar to add text to the current frame in the upper left corner.
11	Select the new text field and enter Lines Subtotal . The Text Properties dialog is displayed as you are typing. Click OK to add the text.
12	Click and drag it to above the VAT Summary list box, nearly to the right margin of the list box.

(Contd) Step	Action
13	<p>To ensure that the column headings (static text) you just added are aligned properly, select the following static text:</p> <ul style="list-style-type: none"> ▶ Code ▶ VAT Rate ▶ Lines Subtotal
14	<p>Select Align Controls from the Display menu, then select Top from the Align Controls cascading menu.</p> <p>Note To select a group of items, click and drag the mouse diagonally across all the items you want to select.</p>
15	<p>Select the VAT and Code static text.</p>
16	<p>Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu.</p>
17	<p>The Invoice Details frame now should look like this:</p> <p>Note Depending on the size of your monitor, you will see more or fewer of the fields in the example above. To see fields that are not displayed currently on the frame, use the scroll bar to scroll down the frame.</p>

How to set the tab sequence on the invoice details frame

The tab sequence is the order in which the cursor moves from field to field in the screen entry translation object when a user presses **TAB**. When you create a screen entry form, the system automatically positions the fields and sets the tab sequence for those fields. However, you usually will want to modify the tab sequence of the fields to meet your screen entry requirements and the new positions of the fields on the frame.

Use this procedure to set the tab sequence for the fields on the Invoice Details frame.

Step	Action
1	<p>Select Set Tab Order from the Display menu. Numbers are displayed in the fields on the frame to indicate the current tab sequence.</p> <p>Note Depending on the size of your monitor, you will see more or fewer of the fields in the example above. To see fields that are not displayed currently on the frame, use the scroll bar to scroll down the frame.</p>

(Contd) Step	Action
2	<p>Click the fields and list boxes listed below in the order in which they are listed. As you click each field, the tab sequence number for that field will change to the next sequential number in the tab sequence.</p> <p>Note If you click a field out of sequence, you must begin setting the tab sequence again. To start over, select Set Tab Order from the Display menu so that the tab sequence numbers are no longer displayed in the fields on the frame, and then begin these steps again.</p> <ol style="list-style-type: none"> a. Invoice No. b. Invoice Date c. Tax-point Date d. Customer's P.O. No. e. P.O. Date f. Delivery Note Number g. Delivery Date h. Location ANA Code i. Location Own Code j. Name k. Address Line 1 l. Address Line 2 m. Address Line 3 n. Address Line 4 o. Post Code p. Payment Terms q. Invoice Notes (first field) r. Invoice Notes (second field, unlabelled) s. Invoice Notes (third field, unlabelled) t. Invoice Notes (fourth field, unlabelled) u. Line Items v. VAT Summary w. Invoice Amount (Excluding VAT) x. Invoice Amount (Ex. Settlement Disc.) y. Invoice Amount (Ex. VAT Inc. Sett.) z. VAT Total aa. Total Invoice Amount (Inc. Sett. Disc.)
3	<p>The new tab sequence should look like this:</p> <p>Note When you click the last field in the sequence (Total Invoice Amount (Inc. Sett. Disc.)), the tab sequence is set, and the tab sequence numbers no longer are displayed in the fields.</p> <p>Note Depending on the size of your monitor, you will see more or fewer of the fields in the example above. To see fields that are not displayed currently on the frame, use the scroll bar to scroll down the frame.</p>

Arranging the Fields on the Line Items Frame

Overview Now that the fields, labels, and static text are arranged on the Invoice Details frame, you are ready to arrange the fields on the Line Items frame. You will place the fields in a logical order, then align the fields (as you did with the fields on the Invoice Details frame) to give the frame a consistent and orderly appearance. When you finish arranging the fields, the Line Items frame in your form should look like the one in the example below.

The screenshot shows a window titled "Line Items" with a dotted background. It contains the following fields and labels:

- Item No. (text input)
- EAN Code (text input)
- Supplier's Product Code (text input)
- Customer's Product Code (text input)
- Quantity (text input)
- Unit of Measure (dropdown menu)
- Unit Price (Ex. VAT) (text input)
- VAT Code (dropdown menu)
- Description (text input)

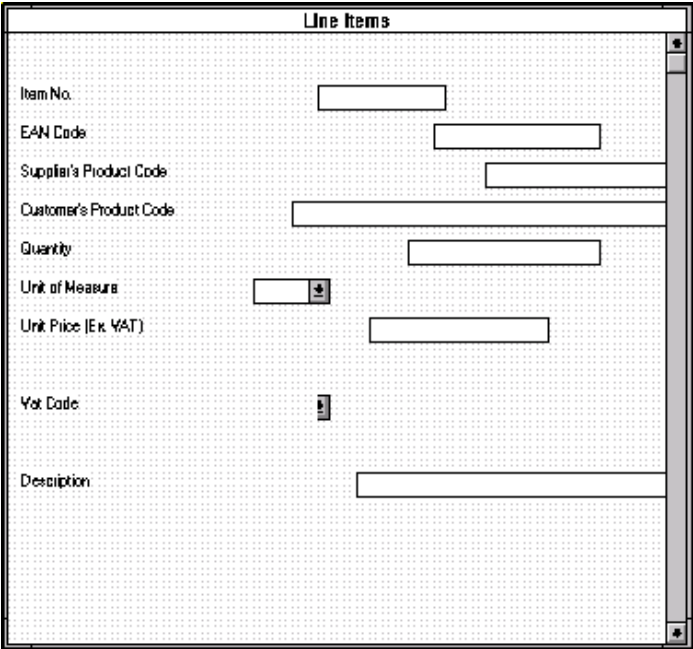
How to resize the line items frame

Before you begin arranging the fields on the Line Items frame, you should resize the frame so that it is the same width as the Invoice Details frame. When this form is compiled into a translation object, the fields will be arranged according to how the frames and the fields contained on them were arranged when the form was compiled. You should eliminate unnecessary space as you arrange the fields on each frame.

Note

When the form is generated, the upper left corner of each frame in the form is placed in the upper left corner of the Layout Window.

Step	Action
1	Click the ILD group (in the ODD group) to display the Line Items frame in the Layout Window.
2	To resize the Line Items frame, click and drag the right side of the frame to the 14 cm mark on the ruler so that the form is wide enough to format the fields according to the instructions in this tutorial. Note Use the horizontal ruler at the top of the frame to help you resize the frame.

(Contd) Step	Action
3	<p>To display more of the form on your screen, click and drag the centre bar between the EDI File Format Window and the Layout Window to the left until the Layout Window is wide enough to display as much of the form as you want to view.</p> <p>The Line Items frame now should look like this:</p> 

How to resize the fields

Use this procedure to resize the fields on the Line Items frame of the screen entry form.

Step	Action
1	<p>Select the following fields:</p> <ul style="list-style-type: none"> ▶ Item No. ▶ Quantity <p>Note To select more than one field, click the first field, then press CTRL and click the second field. Repeat the process of pressing CTRL and clicking the field for each subsequent field you want to select.</p>
2	<p>Select Size to Length from the Display menu. All selected fields will be resized to the lengths specified in the Display Length field of the Display Properties dialog for each field.</p>

How to move and align the fields

Use this procedure to move and align the fields on the Line Items frame of the screen entry form.

Step	Action
1	<p>Select the Unit of Measure field and drag its bottom handle so that the field is long enough for four codes to be displayed in it when the drop-down part of the drop-down list is open (approximately 2 cm on the vertical ruler).</p> <p>Note Use the vertical ruler to the left of the frame to help you measure length.</p>
2	<p>Select the VAT Code and Unit of Measure fields (in that order).</p> <p>Note Select the Unit of Measure field last, so that it is the reference.</p>
3	<p>Select Size Equally from the Display menu. The VAT Code field is the same size as the Unit of Measure field.</p> <p>Note The Unit of Measure and VAT Code drop-down list boxes have slightly different appearances. When the Exclusive check box is marked in the Advanced section of the Field Properties dialog, the text box is attached to the drop-down arrow. When the Exclusive check box is not marked, there is a gap between the text box and the drop-down arrow.</p>
4	<p>Select each field and list box on the frame individually and move it closer to its respective label.</p>
5	<p>Click the Lock Labels button on the Main Toolbar to turn on the Lock Labels function. When you select a field, its corresponding field label will be selected also.</p>
6	<p>Select the Item No. label and field and drag them to the upper left corner of the frame. (When you select the field, its label will be selected, too, because you have the Lock Labels function turned on.)</p>
7	<p>Select the EAN Code label and field and drag them to the upper right corner of the frame.</p>
8	<p>Select the following fields and labels and drag them below the Item No. label and field:</p> <ul style="list-style-type: none"> ▶ Supplier's Product Code ▶ Customer's Product Code ▶ Quantity
9	<p>Select the Unit of Measure label and list box and drag them to the right of the Quantity label and field.</p>

(Contd) Step	Action
10	Select the Unit Price (Ex. VAT) label and field and drag them below the Quantity label and field.
11	Select the VAT Code label and field and drag them under the Unit of Measure label and list box.
12	Select the Description label and field and drag them below the Unit Price (Ex. VAT) label and field.
13	Click the Lock Labels button on the Main Toolbar to turn off the Lock Labels function.

Resizing the line items frame

To resize the Line Items frame, click and drag the bottom of the frame to below the Description label and field.

Note

Allow enough space between the Description label and field, and the bottom of the frame, for the VAT Code drop-down list box to be opened.

The Line Items frame now should look like this:

The screenshot shows a window titled "Line Items" with a dotted background. It contains the following fields and controls:

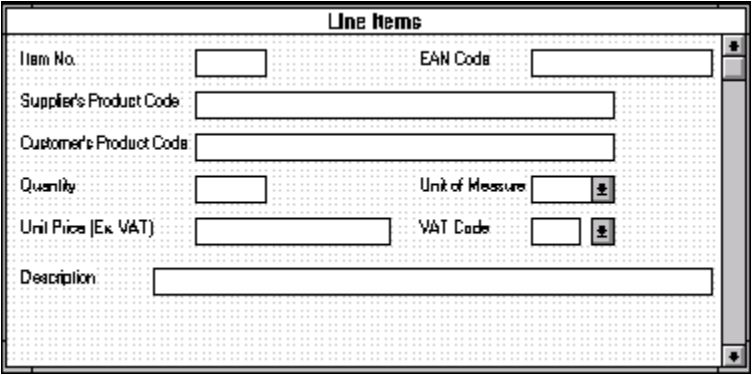
- Item No.
- EAN Code
- Supplier's Product Code
- Customer's Product Code
- Quantity
- Unit of Measure
- Unit Price (Ex. VAT)
- VAT Code
- Description

How to align the fields and field labels

Use this procedure to align the fields and field labels on the Line Items frame.

Step	Action
1	<p>Select the following field labels:</p> <ul style="list-style-type: none"> ▶ Item No. ▶ Supplier's Product Code ▶ Customer's Product Code ▶ Quantity ▶ Unit Price (Ex. VAT) ▶ Description <p>Note To select more than one field, click the first field, then press CTRL and click the second field. Repeat the process of pressing CTRL and clicking the field for each subsequent field you want to select.</p>
2	<p>Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected field labels are aligned.</p>
3	<p>Select the following fields:</p> <ul style="list-style-type: none"> ▶ Item No. ▶ Supplier's Product Code ▶ Customer's Product Code ▶ Quantity ▶ Unit Price (Ex. VAT) <p>Note Select the Customer's Product Code field last, so that it is the reference.</p>
4	<p>Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected fields are aligned.</p>
5	<p>Select the following labels:</p> <ul style="list-style-type: none"> ▶ EAN Code ▶ Unit of Measure ▶ VAT Code <p>Note To select a group of items, click and drag the mouse diagonally across all the fields and labels you want to select.</p>
6	<p>Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected field labels are aligned.</p>

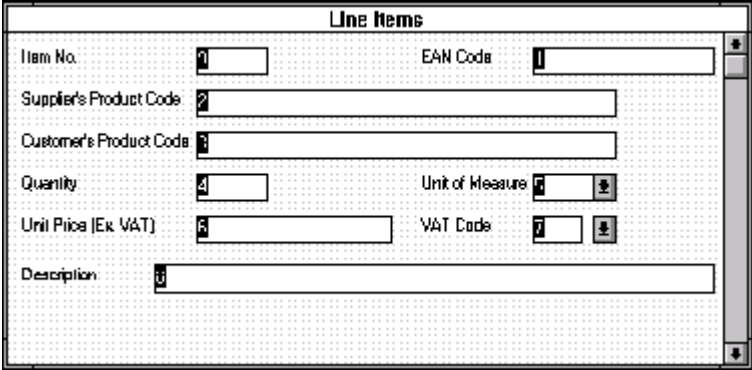
(Contd) Step	Action
7	Select the following field and list boxes: <ul style="list-style-type: none"> ▶ EAN Code ▶ Unit of Measure ▶ VAT Code <p>Note Select the Unit of Measure list box last, so that it is the reference.</p>
8	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected items are aligned.
9	Select the Description and EAN Code fields. <p>Note Select the EAN Code field last, so that it is the reference.</p>
10	Select Align Controls from the Display menu, then select Right from the Align Controls cascading menu. The right margins of the of the selected fields are aligned.

(Contd) Step	Action
11	<p>To align the tops of all of the field labels, fields, and list boxes, select each row of items (one row at a time), select Align Controls from the Display menu, then select Top from the Align Controls cascading menu. The items in each row are listed below:</p> <ul style="list-style-type: none"> ▶ Item No. label and field and EAN Code label and field ▶ Supplier's Product Code label and field ▶ Customer's Product Code label and field ▶ Quantity label and field and Unit of Measure label and drop-down list box ▶ Unit Price (Ex. VAT) label and field and VAT Code label and drop-down list box ▶ Description label and field <p>The Line Items frame now should look like this:</p>  <p>The screenshot shows a window titled "Line Items" with a dotted background. It contains several input fields and dropdown menus arranged in a grid. The fields are: Item No. (text box), EAN Code (text box), Supplier's Product Code (text box), Customer's Product Code (text box), Quantity (text box), Unit of Measure (dropdown menu), Unit Price (Ex. VAT) (text box), VAT Code (dropdown menu), and Description (text box). The top of all these fields is aligned horizontally.</p>

How to set the tab sequence on the line items frame

Use this procedure to set the tab sequence of the fields on the Line Items frame.

Step	Action
1	Select Set Tab Order from the Display menu. Numbers are displayed in the fields on the frame to indicate the current tab sequence.

(Contd) Step	Action
2	<p>Click the fields listed on the next page in the order in which they are listed. As you click each field, the tab sequence number for that field will change to the next sequential number in the tab sequence you are now setting.</p> <p>Note It is important to click each field in the order listed below. If you click a field out of sequence, you must begin setting the tab sequence again. To start over, select Set Tab Order from the Display menu so that the tab sequence numbers are no longer displayed in the fields on the frame, and then begin these steps again.</p> <ol style="list-style-type: none"> a. EAN Code b. Supplier's Product Code c. Customer's Product Code d. Quantity e. Unit of Measure f. Unit Price (Ex. VAT) g. VAT Code h. Description i. Item No. <p>Note The Item No. field is the last field in the tab sequence, although it is the first field in the layout of the Line Items frame. This field is display-only, displaying the next consecutive line item number (the line item number is generated by an extended rule in the ILD group). By placing the Item No. field last in the tab sequence, this field can be skipped easily by users entering data. The first field in the sequence is the EAN Code field, which is the first field into which users can enter a value.</p>
10	<p>The new tab sequence for the Line Items frame should look like this:</p>  <p>Note When you click the last field in the sequence (Item No.), the tab sequence is set, and the tab sequence numbers no longer are displayed in the fields.</p>

Arranging the Fields on the VAT Summary Frame

Overview Just as you arranged the fields, labels, and static text on the Invoice Details and Line Items frames, now you will arrange the items on the VAT Summary frame. You will place the fields in a logical order, then align the fields to give the frame a consistent and orderly appearance. When you finish arranging the fields, the VAT Summary frame in your form should look like the one in the example below.

The screenshot shows a window titled "VAT Summary" with a dotted background. It contains six rows of labels and input fields:

- VAT Code: A small square input field.
- VAT Rate: A rectangular input field.
- Number of Line Items: A rectangular input field.
- Lines Subtotal (Excluding VAT): A rectangular input field.
- VAT Amount Payable: A rectangular input field.
- Payable Subtotal (Inc. Sett. Disc.): A rectangular input field.

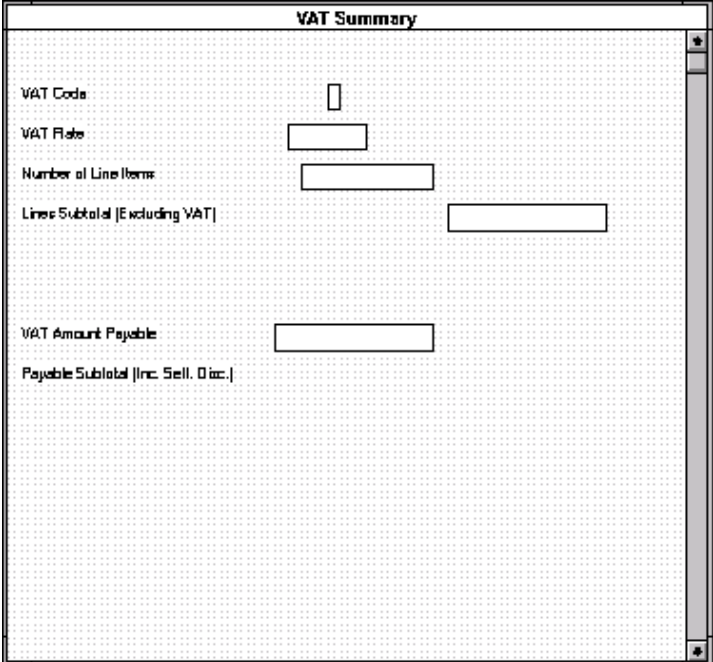
How to resize the VAT summary frame

Before you begin arranging the fields on the VAT Summary frame, you should resize the frame so that it is the same width as the Invoice Details and Line Items frames. When this form is compiled into a translation object, the fields will be arranged according to how the frames and the fields contained on them were arranged when the form was compiled. You should eliminate unnecessary space as you arrange the fields on each frame.

Note

When the form is generated, the upper left corner of each frame in the form is placed in the upper left corner of the Layout Window.

Step	Action
1	Click the STL segment to display the VAT Summary frame in the Layout Window.
2	To resize the VAT Summary frame, click and drag the right side of the frame to the 14 cm mark on the ruler, so that all the fields on the frame are visible. After you arrange the fields on this frame, you will resize the VAT Summary frame so that it matches the other frames in the invoice. Note Use the horizontal ruler at the top of the frame to help you resize the frame.

(Contd) Step	Action
3	<p>To display more of the form on your screen, click and drag the centre bar between the EDI File Format Window and the Layout Window to the left until the Layout Window is wide enough to display as much of the form as you want to view.</p> <p>The VAT Summary frame now should look like this:</p> 

How to resize the VAT code field

Sterling Gentran:Server bases the lengths of fields on the widths of lowercase letters. For example, if a field has a display length (defined on the Display Properties dialog) of five, then Sterling Gentran:Server produces a field with a length able to accommodate the average width of lowercase letters.

The VAT Code field will contain a code in an uppercase letter. Therefore, you should adjust the width of the field to prevent the code in the VAT Code field from being truncated.

Use this procedure to resize the VAT Code field.

Step	Action
1	Select the VAT Code field.
2	Drag its right or left handle so the field is approximately twice as wide as its original width.

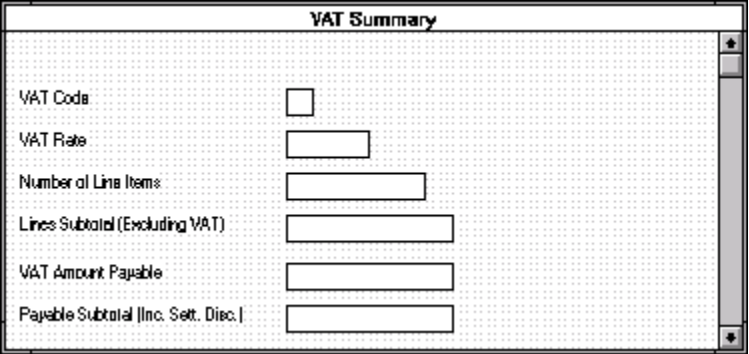
How to move and align the fields

Use this procedure to move and align the fields on the VAT Summary frame of the screen entry form.

Step	Action
1	Select the VAT Amount Payable and Payable Subtotal (Inc. Sett. Disc.) fields and labels, and drag them closer to the Lines Subtotal (Excluding VAT) field and label. Note You may need to temporarily adjust the width of the frame so that the Payable Subtotal (Inc. Sett. Disc.) field is visible.
2	Select all of the fields on the frame. Note Select the VAT Amount Payable field last, so that it is the reference.
3	Select Align Controls from the Display menu, then select Left from the Align Controls cascading menu. The left margins of the selected field labels are aligned.

How to resize the VAT summary frame

Use this procedure to resize the VAT Summary frame.

Step	Action
1	<p>Click and drag the bottom of the frame to below the Payable Subtotal (Inc. Sett. Disc.) label and field.</p> <p>The VAT Summary frame now should look like this:</p>  <p>The screenshot shows a window titled "VAT Summary" with a grid background. It contains the following fields from top to bottom: <ul style="list-style-type: none"> VAT Code: a small square input field. VAT Rate: a rectangular input field. Number of Line Items: a rectangular input field. Lines Subtotal (Excluding VAT): a rectangular input field. VAT Amount Payable: a rectangular input field. Payable Subtotal (Inc. Sett. Disc.): a rectangular input field. The frame has a vertical scrollbar on the right side and a double-headed arrow at the bottom right corner, indicating it is a resizable window. </p>

Whereas in the Invoice Details and Line Items frame you set the tab sequence for the fields on the frames, you do not need to set the tab sequence for the VAT Summary frame. All the fields on this frame (other than the hidden fields) are display-only. Screen entry translation object users will not be able to enter a value in any of the fields, so the tab sequence is irrelevant.

Changing the Invoice Details Frame Title

Overview The system automatically titles the frames in a screen entry form when the form is created, based on the name of the file, segment(s), or group(s). You can modify the frame titles (for example, at the file or message level) to distinguish one form from the others. The parent frame of the invoice currently is titled Invoice Details. You will give this frame a more descriptive title to distinguish it from other invoices that your company uses.

Procedure Use this procedure to change the frame title.

Step	Action
1	Click the INVOIC file icon with the right mouse button to access the shortcut menu.
2	Select Properties from the shortcut menu. System Response The File Format Properties dialog is displayed.
3	In the Frame Caption field, enter TRADACOMS ANA001 INVOIC Release 9 - Pet Zone .
4	Click the OK button. System Response The new frame title is displayed in the frame title in the Layout Window.
5	Click Generate Layout on the Main Toolbar to refresh the display of the screen entry form.
6	Select Save from the File menu to save the form.

You have completed your Invoice form. Now, you are ready to finalize the form.

Finalize the Form

Overview

Introduction

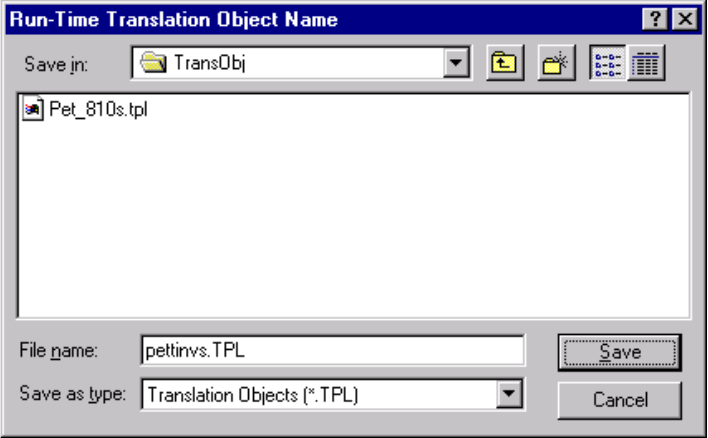
Now that you have created and customized a screen entry form, you are ready to compile the form to generate the translation object (*.TPL) that Sterling Gentran:Server uses before you print the report and test the compiled translation object.

Compiling the Form

Overview The Compile function compiles the form. The form that you create using Sterling Gentran:Server is a **source form**. When that source form is compiled, the result is a **compiled translation object**.

This translation object must be registered with the Sterling Gentran:Server system before you can use it. You will use the Compile function after the form is completed and saved.

Procedure Use this procedure to compile the form.

Step	Action
1	<p>Select Compile from the File menu to display the Run-Time Translation Object Name dialog.</p> 
2	<p>Click Save to accept the translation object name (pettinvs.tpl) in the “File name” field.</p> <p>This name for the compiled translation object (.TPL file) is the same filename as the source form (.STP file). Preserving the same filename (with different file extensions) ensures that the relationship between the source form and the compiled translation object remains evident.</p> <p>CAUTION</p> <p>BE VERY CAREFUL NOT TO OVERLAY THE SOURCE FORM WITH THE COMPILED TRANSLATION OBJECT. USE THE .TPL FILE EXTENSION TO DISTINGUISH THE COMPILED TRANSLATION OBJECT.</p> <p>The system will compile the form and generate an error report. The error report is displayed in the Compile Errors dialog.</p>

(Contd) Step	Action
3	Click OK to exit the Compile Errors dialog. Note If the Compile Errors dialog contains errors, you must fix the problem(s) by redoing the appropriate section of the tutorial. Recompile the form after you correct the error(s) and save the form.
4	Select Save from the File menu to save the form. The date on which you compiled the form is loaded automatically into the Compiled on field on the Translation Object Details dialog.

Printing the Report

Overview The Sterling Gentran:Server report enables you to validate and review the translation object, and make modifications as needed. If you review the report and determine that the translation object is incorrect, you should reiterate the form creation process as many times as necessary (make the modifications, save the form, recompile the form, and print the report again).

Procedure Use this procedure to print the Sterling Gentran:Server report.

Step	Action
1	Select Print from the File menu to access the Print Options dialog.
2	Click OK to accept the defaults on this dialog (all options marked), so the report includes all sections and only the activated form components. System Response The Print dialog is displayed.
3	Do you need to change setup options (to select a specific printer, paper orientation, or size and source of paper) ? <ul style="list-style-type: none"> ▶ If yes, click Properties. Set the appropriate options. Click OK to begin the print process. ▶ If no, click OK to begin the print process.

Testing the Translation Object

Overview After you compile the form, print and verify the report, and register the translation object with Sterling Gentran:Server, you should test the translation object to verify that the data is translated correctly. To test the compiled translation object, you should use the translation object to create a new document. You also should verify acknowledgement processing (if applicable) and verify communications with your network.

Important

The translation object must be registered with the Sterling Gentran:Server system before you can use it.

Reference

See the *IBM® Sterling Gentran:Server® for Microsoft Windows User Guide* for information on registering the translation object.

Procedure Use this procedure to test the screen entry translation object you just created.

Step	Action
1	Register the PETTINVS.TPL translation object with Sterling Gentran:Server. Reference See the <i>IBM® Sterling Gentran:Server® for Microsoft Windows User Guide</i> for more information on registering a translation object.
2	If you have not done so already, import the PETZONE4.PAR partner relationship into Sterling Gentran:Server. Reference See the <i>IBM® Sterling Gentran:Server® for Microsoft Windows User Guide</i> for more information on importing a partner.
3	Import the division lookup table (INVATCO.LKP) for the system partner (Internal System User) into Sterling Gentran:Server. Reference See the <i>IBM® Sterling Gentran:Server® for Microsoft Windows User Guide</i> for more information on importing a table. The default full path for the lookup table is: C:\GENSRVNT\TUTORIAL\INVATCO.LKP

(Contd) Step	Action
4	<p>Verify (in Partner Editor) that the Screen TRADACOMS INVOIC Pet Zone screen entry translation object is selected for the Outbound Relationship.</p> <p>Reference See the <i>IBM® Sterling Gentran:Server® for Microsoft Windows User Guide</i> for more information on selecting outbound translation objects.</p>
5	<p>Create a new document (partner PETZONE4 and relationship PETZONE4_TRADACOMS_INVOIC) to enter the data in the screen entry translation object you created.</p> <p>Reference See the <i>IBM® Sterling Gentran:Server® for Microsoft Windows User Guide</i> for more information on creating a document.</p>

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Glossary

?In Documents	This Sterling Gentran:Server browser contains a list of messages that were received by the system but failed compliance checking or that do not have an identifiable partner or transaction set.
?Out Documents	This Sterling Gentran:Server browser contains a list of messages that were imported into the system via unattended processing but are invalid.
acknowledgement	This term is used to indicate the ANSI 997 functional acknowledgement, the EDIA 999 acceptance/rejection advice, and the EDIFACT CNTRL message.
activation	This function enables you to make map components available for use. The system activates all the groups, segments, composites, and elements that are defined as “mandatory” (must be present) by the standard. The system does not enable you to deactivate the mandatory groups, segments, composites, and elements. When translating data, the system does not process groups, segments, composites, and elements (or records and fields) that are not activated. Therefore, <i>you</i> must activate the groups, segments, composites, and elements that are not defined as mandatory by the standard, but that you have determined that you need to use in mapping.
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, such as safety glasses and battery capacities. The ANSI X12 committee is the chief EDI standards-setting organisation for the United States.
application file	If you are creating an import or export map, you must define your application to the Application Integration subsystem. In Sterling Gentran:Server terminology, your application file is also referred to as a <i>fixed-format file</i> or a <i>positional file</i> . Your application file must contain all the information that you either need to extract from your partner’s message (if the map is inbound) or need to send to your partner (if the map is outbound), so that your system can accurately process the data.

application system	Computer systems, outside of EDI, designed to fulfil specific business functions. These include accounting, purchasing, materials control, human resources, shipping, and other systems.
browser	A browser is a window that displays a list of items, such as messages (transaction sets), interchanges, translation objects, etc. A message browser displays only messages.
check box	A check box enables you to select or clear options from a list. You can select as many options from the list as you need. A selected check box contains a checkmark. The labels of unavailable options are dimmed.
code list tables	These are used by EDI standards as repositories for lists of codes. Each EDI standard provides a code list for each element that can be further defined with a code.
colours	This feature enables you to select foreground and background colours to visually define the various map components. The use of colour is optional.
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	This is the Sterling 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.
compile	This function compiles the form and creates a translation object. The form that you create using Sterling Gentran:Server is a <i>source form</i> . When that source form is compiled, the result is a <i>compiled translation object</i> . This translation object will need to be registered with the Sterling Gentran:Server system before you can use it.
compliant	This means that the message 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 contains two or more component data elements or sub-elements. Composites are defined by the EDI standards that use them (EDIFACT, TRADACOMS, and certain ANSI X12 standards).

conditions	See relational conditions.
constant	This standard rule enables you to move a literal constant value to the specified element or field, indicate a qualifying relationship with another element or field, and map the current date or time to the specified element or field.
cross-reference table	This table is created in Partner Editor and is used to convert your values to your trading partner's values during outbound processing, or your partner's values to your values during inbound processing.
date/time	This type of field or element contains a date or time. If you specify that a field or element will be a date/time type, you must specify exactly how the date or time must be formatted.
deactivation	This function enables you to make map components unavailable for use by the system. The system does not enable you to deactivate the mandatory groups, segments, composites, and elements.
default	A predefined value – programs use these built-in values <i>unless</i> you specifically override them.
document (message)	<p>One transaction set containing actual data and treated as a single entity. The amount of data does not affect whether something is a message or not, only the fact that it is treated as a single entity. For example, regardless of whether a purchase order contains one item or ten thousand, if it is one purchase order, it is one message.</p> <p>If a trading partner sends you a communication containing 10 purchase orders, you have received 10 messages. If the communication contained 15 invoices, you have received 15 messages.</p>
EANA	International Article Numbering Association, Brussels, Belgium.
EDI	Electronic Data Interchange (EDI) is the process by which companies can exchange business messages directly from application to application by computer without paper messages being produced.
EDI File Format Pane	The EDI File Format Pane contains the EDI file format. When you click a segment or group in the EDI file format, the corresponding frame is displayed in the Layout Window. When you click an element in the EDI file format, the corresponding layout component is highlighted in the Layout Window.

EDI standard This is the rules for turning a business message into an EDI message.

EDIA The Electronic Data Interchange Association, formerly known as the Transportation Data Coordinating Committee (TDCC).

EDIFACT This is the standards organisation of the United Nations Economic and Social Council. The acronym is short for the Electronic Data Interchange for Administration, Commerce, and Transport.

element The smallest piece of usable information defined by the standards. Examples might include a quantity, unit price, or description. An individual element can have somewhat different meanings depending on context. Therefore, elements are normally not considered to have useful meaning until they are combined into segments. An element is the EDI map component that is mapped (linked) to a corresponding application field to move data to and from the EDI file.

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, as follows:

Transaction Set

Each transaction set (business message) is contained within a transaction set envelope.

Functional Group

An envelope containing related business messages. 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 will 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.

equalize	This function enables you to reinstate the two sides of the map with focus in equal dimensions. The use of the Equalize function is optional.
export map	This map defines how to move data from the EDI standard-formatted messages that your partners send you to your application file (flat file definition). An export map is necessary for inbound processing.
export translation object	See export map.
extended rules	These rules enable you to use a Sterling Gentran:Server proprietary programming language to perform virtually any mapping operation you require.
field	The smallest piece of information defined in the application file. A field is the application map component that is mapped (linked) to a corresponding EDI element to move data to and from your application file.
fixed-format file	See application file.
form	A form is a set of instructions you define in the Forms Integration subsystem that indicates how the system should format data.
frame	A frame contains the groups, repeating segments, and elements at that level (single segments are not represented on the frame). Sterling Gentran:Server uses frames to format the EDI file for the translation object.
functional group	A group of transaction sets that the standards-setting body (such as ANSI) has defined as fitting together with other related transaction sets. An example might be a Functional Group defined as containing all purchasing transaction sets.

group	A looping structure that contains related records/segments and/or groups that repeat in sequence until either the group data ends or the maximum number of times that the loop is allowed to repeat is exhausted. If you create a group that is subordinate to another group (a sub-group), this corresponds to a nested looping structure (a loop within a loop). The application (positional) file and the EDI file are both groups and therefore, they are visually represented the same way as other groups and sub-groups in Sterling Gentran:Server.
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.
import map	This map defines how to move data from your application file (flat file definition), which may contain multiple messages, to the EDI standard-formatted messages that your partners expect to receive from you. An import map is necessary for outbound processing.
import translation object	See import map.
inbound mapping	The system translates your trading partner's EDI standard formatted business message to your application file format, so you can receive messages from you partners. To translate inbound data, you need to create an export map.
In Documents	This Sterling Gentran:Server browser contains a list of messages that the system received but that have not yet been processed by the user. Once the messages are processed (printed or exported) the messages will be transferred to the In Drawer.
In Drawer	This Sterling Gentran:Server browser contains a list of messages that were received and processed.
integer	An integer is a number that has an implied decimal point (e.g., "2.01" is formatted as "201").
interchange	The interchange contains all the functional groups of messages (transaction sets) sent from one sender to one receiver in the same transmission.
Interchanges browser	This Sterling Gentran:Server browser enables you to view a hierarchical list of all the interchanges that were sent or received. It contains status information about the interchanges, (e.g., whether or not a functional acknowledgement was received and the status of that acknowledgement). This browser also enables you to access the messages within the interchanges. The Interchanges browser can always be accessed.

Layout Pane	The Layout Pane contains the actual format of the translation object. Each group (with a maximum usage greater than one) and repeating segment has a corresponding frame in the Layout Window. When you click a segment or group in the EDI file format, the corresponding frame is displayed in the Layout Window. When you click an element in the EDI file format, the corresponding layout component is highlighted in the Layout Window.
list box	A list box displays a list of choices. Scroll bars are provided if there are more choices than can fit in the box.
literal constant	These are used by the system as a repository to store information that will be used at a later point in the map. Typically, constants are used in an outbound map to generate a qualifier.
location table	This is a table created in Partner Editor that is used to contain address-related information about the partner.
lookup table	This is a table created in Partner Editor that is used to select information related to a value in inbound or outbound data.
loop count	This standard rule enables you to count the number of times a loop is repeated, if the element or field is part of a loop. If the loop is a nested loop, you can track the current loop <i>or</i> the outer loop. For example, if the Y loop is nested within the X loop, and the Y loop has cycled through 15 iterations and the X loop has cycled through 3 iterations, you can choose to count either the “15” (Y loop) or the “3” (X loop).
loop start/loop end	Certain EDI standards use Loop Start (LS) and Loop End (LE) segments. LS and LE segments differentiate between two or more loops of the same type. If the transaction contains LS and LE segments and depending on whether your map is inbound or outbound, you will need to define the LS and LE segments for the loops you will be using in the map in one of two different ways.
map	A set of instructions you define in the Application Integration subsystem that indicates the corresponding relationship between your application file and the EDI standards, and defines how the system should translate data.
network	Also known as a Third Party Network or Value-Added Network (VAN) that accepts and holds transmissions from companies until it is convenient for a trading partner to accept them.

number	This type of field or element contains either an integer or real number. If you specify that a field or element will be a number type, you must designate the format by specifying a format of either “N” (integer) or “R” (real) and the number of decimal places.
ODETTE	The Organisation for Data Exchange by Tele-Transmission in Europe.
outbound mapping	The system translates your application file format to EDI standard formats, so you can send messages to your partners. To translate outbound data, you need to create an import map and a system import map in the Application Integration subsystem.
Out Documents	This Sterling Gentran:Server browser contains a list of messages that are ready to be sent. After the messages are successfully sent, they are automatically transferred to the Out Drawer.
Out Drawer	This Sterling Gentran:Server browser contains a list of messages that were successfully sent out by the system.
partner	Another firm with which your company trades messages. Also referred to as a trading partner.
Partner Editor	This Sterling Gentran:Server function enables you to define, edit, and delete all partner information for your company and all of your trading partners.
positional file	See application file.
post	This Sterling Gentran:Server function enables you to move compliant messages from the Workspace to the Out Documents.
predefined	On a data entry translation object, a default value for a particular element. You can change the value as necessary.
printout	This is produced when data received from a trading partner passes through a print translation object. You do not have to actually print the data. The printout could be to a file on your hard disk.
print translation object	A print translation object organizes and formats the printout of EDI messages that are received from or sent to the trading partner(s) for which you have established a trading relationship (inbound or outbound) that uses that print translation object. The print translation object enables you to view the EDI message in an easily readable format.

promote	This function extracts one iteration (instance) of a group or repeating segment. This enables you to map unique data from your application file, and/or enter a specialized definition. Sterling Gentran:Server specifies that only one-to-one (no loops) or many-to-many (loop) mapping relationships are valid.
qualifier	This is an element that has a value expressed as a code that gives a specific meaning to the function of another element. A qualifying relationship is the interaction between an element and its qualifier. The function of the element changes depending on which code the qualifier contains.
radio buttons	Radio buttons indicate a group of mutually exclusive options. You can only select one option at a time. Select an option by clicking the radio button or pressing the Space Bar until the option you want is selected. The selected option contains a black dot. The labels of unavailable choices are dimmed.
real number	A real number has an explicit decimal point (e.g., “2.01” is formatted as “2.01”), and truncates trailing zeroes.
receive	This Sterling Gentran:Server function enables you to manually initiate a communications session to receive data from a network through an invocation of the Connection Manager.
record	Contains a group of related fields. A record can occur once or can repeat multiple times.
relational condition	This function enables to connect fields together for syntax or compliance reasons. For example, Field A is invalid unless Field B is present. Therefore, if you set up a condition that pairs Fields A and B, the system will generate a compliance error if one of those fields is not present.
respond	This Sterling Gentran:Server function enables you to create a turnaround message (using the Turn Around translation object in the partner relationship) in response to one or more selected message(s) in the In Drawer.
responsible agency	An organisation that develops and updates standards for EDI communications. These organisations include ANSI, EDIA, AIAG, UCS, EDIFACT, ODETTE, and VICS.
screen entry translation object	A screen entry translation object provides a standardized format for keying an EDI message into the Document Editor, for translation and transmission to your trading partner(s), for which you have established an outbound trading relationship that utilizes that screen entry translation object. The screen entry translation object ensures that your users key all the data necessary to create the required EDI message.

segment	A group of related elements or composite data elements that combine to communicate useful data. Segments are defined by the EDI standards. A segment can occur once or can repeat multiple times. For example, a catalogue price segment might consist of elements for item description, volume, price, lead time, etc. By themselves, none of these elements would communicate useful information. Together, they provide the information necessary for someone to tell if the item is what is desired, whether the price is reasonable, etc. A number of segments together form a transaction set.
select	This standard rule enables you to select entries from a location table, cross-reference table, partner table, or lookup table (all tables created in the Sterling Gentran:Server Partner Editor). You can then map the fields in those tables to one or more fields in the data. The Select function uses the value of the current field to perform the selection.
send	This Sterling Gentran:Server function enables you to manually start a communications session to send data to a network through an invocation of Connection Manager. Only selected messages are enveloped and sent. If no messages are selected, ALL messages will be sent. Successfully sent messages are moved to the Out Drawer.
set	See Transaction Set.
simple mapping	See link.
split	This function enables you to split (break) a group or repeating segment into two loops. You will typically use this function when you need more than one instance of the same map component that still occurs multiple times.
standard rules	These rules give you access to functions that are necessary for mapping operations that are more complex than simple linking, but less involved than extended rules. Each of the standard rules are mutually exclusive (you can use only one on a particular field).
static text	Static text is text that is always included in the screen entry or print translation object. Examples of static text include legends and column headings. Field labels, which usually accompany fields to identify the contents of the fields, are not considered static text.
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 (e.g., CAP for the “Caps Lock” key or NUM for the “Num Lock” key, etc.).

string	This type of field or element contains one or more printable characters. If you specify that a field or element will be a string type, you must designate the format by specifying a syntax token.
syntax token	This function enables you to designate a “token” that defines ranges of characters and/or numbers that are allowed to be used for a string-type element or field. You can then use the syntax tokens in the Format field of the Field Properties dialog. This enables you to define what type of characters should be used while compliance checking each element/field (i.e., alphanumeric within a certain range, numeric within a certain range, etc.).
system import map	The translator uses this map to determine which trading relationship (established in Partner Editor) corresponds to each message in the application file, so the system will know which import map to use to process the message. You need a system import map that is defined in EDIMGR.INI to translate outbound data.
system import translation object	See system import map.
system translation object	These translation objects control the creation and separation of interchanges, functional groups, and transaction sets. They also used to generate and reconcile functional acknowledgements. All the required system translation objects are automatically installed with the Sterling Gentran:Server system.
TDCC	See EDIA.
TDF	TDF is the Transaction Data File. This file serves as a filter between your message files and the Sterling Gentran:Server translator. For outbound processing, data is imported from a TDF file and translated to EDI format using a TDF Import translation object. The data is then ready to be posted and sent to your trading partner. For inbound processing, EDI messages that are received by Sterling Gentran:Server can be exported to a TDF-formatted file using a TDF Export translation object. This data file is then ready to be processed or converted to your internal application files.
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	This contains buttons that graphically represent commands available in the Menu Bar.

TRADACOMS	The U.K. standards for EDI that are published by the Article Numbering Association (UK) LTD.
trading partner	Another firm with which you company trades messages. Also referred to as a partner.
transaction set (message)	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 “message” in Europe.
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 object(s) will be used by each partner relationship.</p> <p><u>Inbound Translation Objects:</u></p> <p>Turn Around: This translation object is used when a message is received, to create the natural response message that contains as many elements from the received message as possible.</p> <p>Export File: This translation object indicates that when a message is received, it will be exported to a specified file format.</p> <p>Print: This translation object is used to print messages.</p> <p><u>Outbound Translation Objects:</u></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 messages.</p> <p>Data Entry: This translation object is used to enter data into the Message Editor facility.</p>
translator	This is the engine that processes data for the Sterling Gentran:Server, Application Integration subsystem and Forms Integration subsystem.
transmission	See Communications Session.
transmission chain	A path an EDI communication could follow, including one company, one trading partner, and one or more network services.
turnaround document	A message into which data elements from the source message have been automatically transferred using a turnaround map.

turnaround map	A series of instructions that the system uses to create a turnaround message (a logical response message to the source) from an inbound (source) message, by transferring data from the source message to elements in the target message (translation object).
UCS	The Uniform Communications Standard is the standard used by the grocery industry.
update	<p>This standard rule enables you to update a specific field in a message record, envelope segment, interchange, group, current partner, or message (if the map side format type is EDI), with the contents of the element or field.</p> <p>Note Please note that this function updates the internal Sterling Gentran:Server database tables. We recommend that you use this function only if you are sure you really want to update the internal database tables.</p> <p>Typically, you will <i>only</i> use this function if you want to update the message name and reference in the message table. Any other use of this function could have disastrous consequences!</p>
use accum	<p>This standard rule gives you access to a set of numeric variables that you can manipulate via numeric operations, and then transfer to and from fields. This function enables you to add, change, or delete calculations for the element/field, including hash totals (used to accumulate numeric field values, i.e., quantity, price, etc.). This function also enables you to map the accumulated total into a control total field, and use accumulators.</p> <p>Accumulators are used generally for counting the occurrences of a specific element or generating increasing or sequential record or line item numbers.</p>
use code	<p>This standard rule enables you to match an element or field against a predefined code table, specify whether or not a compliance error will be generated if the element or field does not contain one of the values in the code table, and store a code's description in another element or field.</p>
user translation object	<p>These translation objects control data entry, importing, exporting, message turnaround, and creating printed reports. These translation objects are created using the Application Integration or Forms Integration subsystems. The Application Integration subsystem enables you to generate import, export, and message turnaround translation objects. The Forms Integration subsystem enables you to generate data entry and print translation objects.</p>
version	<p>Each standards-setting body updates its standards on a regular basis. Each formal update is referred to as a version.</p>

VICS The Voluntary Inter-industry Communication Standards is the standards-setting body for the retail industry, a subset of ANSI X12.

Workspace This Sterling Gentran:Server browser contains a list of outbound “Work in Progress” messages. It also contains recently imported or data entry messages.

X12 The ANSI committee that sets and publishes standards for EDI.
