IBM Sterling Gentran:Server for Windows

IBM

HIPAA and NCPDP Compliance Guide

Version 5.3.1

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Contents

Chapter 1. Sterling Gentran:Server HIPAA Support Features

About Support for HIPAA in Sterling Gentran:Server

The Health Insurance Portability and Accountability Act of 1996 (HIPAA) requires that various health care plans, and health care providers and clearinghouses meet certain data security and other types of mandates for electronic health care transactions.

Your IBM® Sterling Gentran:Server® for Microsoft Windows product provides features to help you meet HIPAA requirements. These are the Sterling Gentran:Server compliance features:

- Support for the electronic data interchange standards that HIPAA requires
- Provision for automatic logoff
- Provision for emergency access to the system

Note: To comply with the HIPAA mandates listed above, you must implement the features as described in this document. You will not be in compliance if you bypass or modify these features.

Activating HIPAA features

When you install Sterling Gentran:Server for Microsoft Windows, you must choose the HIPAA compliance option to activate the HIPAA features in the product.

Supported standards

Sterling Gentran:Server supports the national electronic data interchange (EDI) standards for electronic health care transactions adopted in HIPAA. These are:

- ANSI ASC X12N standards, Version 4010, for all transactions except retail pharmacy transactions. Certain ASC X12 transaction sets include binary segments. Sterling Gentran:Server is able to process binary segments that are part of a supported standard.
- NCPDP Telecommunications Standard, Version 5.1 (batch version). Sterling Gentran:Server is able to process repeating elements that are part of this standard.

Automatic logoff

The Health Insurance Portability and Accountability Act (HIPAA) requires software systems that display patient information to automatically exit when not in use. The purpose of this requirement is to prevent unauthorized persons from viewing and gaining access to the system.

When you use Sterling Gentran:Server for Microsoft Windows and choose to be HIPAA compliant, you must have a screen saver enabled with password protection, or you will not be able to log on to the Sterling Gentran:Server system.

Emergency access

HIPAA requires emergency access to patient information, which is to be used in emergency cases where quick, direct access is required. This emergency access is commonly referred to as a "back door" into the system.

The installation of Sterling Gentran:Server for Microsoft Windows requires you to supply a known username/password combination, which you must then note and store in a secure location. This username/password combination is the emergency access user.

Setting up Security

When you use Sterling Gentran:Server for Microsoft Windows and choose to be HIPAA compliant, you must have a screen saver enabled with password protection, or you will not be able to log on to the Sterling Gentran:Server system.

About this task

You are not HIPAA compliant and Sterling Gentran:Server (with the HIPAA compliance option activated) will not execute on systems that do not have a screen saver configured with password protection.

Use this procedure to set up security.

Procedure

1. When you install your Sterling Gentran:Server for Microsoft Windows software, select the HIPAA compliance option. See the *Installation Guide* for instructions.
2. Configure your system's screen saver to protect your files.
   - Select a screen saver
   - Enable the password protection option and set a password for the screen saver
   - Select the number of minutes your computer can remain idle before it displays the password-protected screen saver.

   See your Microsoft Windows documentation and online help system for instructions on configuring these settings.

System Checks

Because you chose the HIPAA compliance option during installation, Sterling Gentran:Server will verify that you have set your computer's screen saver option with a password when you start certain programs.

If the screen saver with password is not set, the system blocks your access to programs capable of displaying patient information, such as the EDI Manager. Sterling Gentran:Server displays a message to remind you that you must set the screen saver option with a password.

If you turn off the screen saver with password option after you start Sterling Gentran:Server, the system halts and displays a reminder message. You cannot resume until you turn on the screen saver with password.

Regaining access

This table shows how to regain access to your system when you have security settings enabled.

If...	Then...	And you must...
The Microsoft Windows screen saver with password option is turned off when you start Sterling Gentran:Server	Sterling Gentran:Server displays an error message and prevents access.	enable the Microsoft Windows screen saver with password option to gain access.
You turn off the screen saver with password option after you start Sterling Gentran:Server	Sterling Gentran:Server freezes activity and displays an error message.	enable the screen saver with password option to continue.
When the time-out value set in your screen saver expires	your computer monitor displays the screen saver configured for your computer along with a password dialog box.	type the password specified for your screen saver into the dialog box and click **OK**.

How to Access Sterling Gentran:Server in an Emergency

This topic explains what to do in the event your Sterling Gentran:Server security administrator is unavailable or unable to access the system in an emergency situation.

To gain access to Sterling Gentran:Server in an emergency, you must call an IBM support representative and explain the situation. The support representative will provide a solution.

Chapter 2. Using NCPDP with Sterling Gentran:Server

Separator Characters

The specific separator characters used to distinguish groups, segments, and fields are fixed in the NCPDP Standard.

This table lists the separator characters.

Level of Separator	Decimal Representation	Hex Representation	Comment
Segment	30	1E	Separates segments from each other
Group	29	1D	Separates groups from each other
Field	28	1C	Separates fields from each other

This example shows how separators are used in an NCPDP transaction.

```
61006650B112345678901074563663bbbbbbbb19970920bbbbbbbbb<1E><1C>AM04<1C>
C2987654321<1E><1C>AM01<1C>CX01<1C>CY123456789<1C>C419620615<1C>C51<1C>
CAJOSEPH<1C>CBSMITH<1C>CM123 MAIN STREET<1C>CNMY TOWN<1C>COCO<1C>CP34567
```

Supported NCPDP Version and Transactions

Sterling Gentran:Server supports version 5.1 of the NCPDP Telecommunications Standard.

This table lists the NCPDP 5.1 transactions that Sterling Gentran:Server supports.

Transaction Code	Transaction Name
E1	Eligibility Verification
B1	Billing
B2	Reversal
B3	Rebill
P1	Prior Authorization Request and Billing
P2	Prior Authorization Reversal
P3	Prior Authorization Inquiry
P4	Prior Authorization Request Only
N1	Information Reporting
N2	Information Reporting Reversal
N3	Information Reporting Rebill
C1	Controlled Substance Reporting
C2	Controlled Substance Reporting Reversal
C3	Controlled Substance Reporting Reversal

Transaction Types: Requests and Responses

The NCPDP standard has two main types of transactions - requests and responses.

- Requests are claim transactions that a pharmacy or other provider submits to an insurer or other processor.
- Responses are replies to request transactions.

Structure of a request

This is the basic structure of a request:

- Header segment (for a request)
- Patient segment
- Insurance segment
- Transaction group (up to four per transmission for transaction codes B1-B3, except for compounds, N1-N3, and C1-C3)
  - Claim segment
  - Pharmacy Provider segment
  - Prescriber segment
  - Coordination of benefits/Other payments segment
  - Workers' compensation segment
  - DUR/PPS segment
  - Pricing segment
  - Coupon segment
  - Compound segment
  - Prior authorization segment
  - Clinical segment

Structure of a response

This is the basic structure of a response:

- Header segment (for a response)
- Message segment (for a response)
- Insurance segment (for a response)
- Transaction response (up to four per transmission)
- Response Status Group
  - Response Claim segment
  - Response Pricing segment
  - Response DUR/PPS segment
  - Response Prior Authorization segment

Note: A response transmission contains an NCPDP response transaction for each request transaction received.

NCPDP Transaction Syntax

Transactions are a collection of segments separated by Segment separator characters. Transactions are separated within a transmission with a group separator character.

Transaction syntax

This is an example of the syntax of a billing request transaction:

Transaction header segment
- Transaction header fields. Fixed-length without field separators. In this segment, each data element is transmitted at its maximum length positionally.

Segment separator

Insurance segment
- Required fields within segment, with field separators
- Optional fields within segment, with field separators

Segment separator

Patient segment
- Required fields within segment, with field separators
- Optional fields within segment, with field separators

Group separator

Segment separator

Claim segment
- Required fields within segment, with field separators
- Optional fields within segment, with field separators

Segment separator

Pricing segment
- Required fields within segment, with field separators
- Optional fields within segment, with field separators

Truncation

Sterling Gentran:Server provides the ability to truncate delimited data elements. If your trading partner accepts variable-length fields, you can use truncation to suppress leading zeros in numeric fields and trailing spaces in alphanumeric fields. Truncation helps decrease transmission time.

Five Key Fields for Trading Partnership Code

For inbound translation, Sterling Gentran:Server looks for the values of five key fields in the transaction to determine the Trading Partnership code in an NCPDP batch transaction.

This table lists the five key fields and their locations.

Key Field	Location
Sender ID	Batch transaction header
Version/Release Number	Transaction header segment

Key Field	Location
Transaction Code	Batch header segment
Test Production	Batch header segment

Note: The agency is hardcoded as "D".

See Batch Transaction Header for the layout of the header. See Request Transaction Header Segment and Response Transaction Header Segment for the layout of the transaction header segments.

About NCPDP Batch Transmissions

Sterling Gentran:Server transmits NCPDP transactions in batch mode, using the NCPDP Batch Transaction Standard format.

The NCPDP Batch Transaction Standard is a standardized file submission format that enables organizations to submit electronic pharmacy transactions in a non-real-time mode.

An NCPDP batch transaction has a uniform format that begins with a batch transaction header segment and ends with a trailer segment. The actual transactions are arranged in detail data records between these two segments.

For example: A pharmacy submitting claims to an insurer sends a batch file that contains one batch transaction header, a detail data record for each claim, and one batch trailer segment.

Parts of an NCPDP Batch Transmission

There are three parts (records) in an NCPDP batch transmission:
- Batch Transaction Header Segment (segment identifier = 00)
- One or more Batch Detail Data Records (segment identifier = G1)
- Batch Trailer Segment (segment identifier = 99)

Each part begins with a start-of-text STX field (hex02) and ends with an end-of-text ETX field (hex03). The Start- and End-of-text fields are also used to delimit the detail data records within the file.

For example, the following contains a batch header record, two incomplete detail data records, and a batch trailer record. The segment identifiers are in boldface type.

```
(STX)00T12890123456736745890222298767471994120116327T11DEABGHCFYTEWQASDXZAQ3124(ETX)
(STX)G110000543219999993201..............(ETX)
(STX)G110000543229999993201..............(ETX)
(STX)994876747000000000004initial Test....(ETX)
```

A batch transmission that does not have a detail data record is considered a response to a batch file error. A batch file error indicates that an entire batch file was rejected, usually because the file failed the processor's file integrity test.

For example, if the record counts in the header segment and the trailer segment do not match, the result is a batch file error.

Batch Transaction Header Segment

Each batch file has one batch transaction header segment.

The batch transaction header is a positional (fixed-length non-delimited) segment, 75 characters in length.

The header contains information that identifies the batch file. This information includes:
- Segment identifier
- Batch Number field that contains the same value as the Batch Number field in the batch trailer segment
- Creation date
- Creation time
- Sender ID
- Receiver ID

See Batch Transaction Header for a description of the fields in the batch transaction header.

The Sender ID, version, release, and test/production in the batch transaction header are four of the five key fields used to determine the Trading Partnership code. The remaining key fields are in the Transaction Header Segment of the batch detail data record.

See Five Key Fields for Trading Partnership Code for a complete list.

Batch Detail Data Record

A batch file contains one detail data record for each request or response transmission.

A batch detail data record contains an actual NCPDP transmission. Each detail data record transmitted in the batch file must follow the format defined for the transaction in the NCPDP Telecommunication Standard.
- Detail data records contain both fixed-length (positional) and variable-length fields.
- A batch transmission can have up to 9,999,999,997 detail data records per file.
- Each batch detail data record contains a Transaction Header Segment to identify the transaction set. The transaction header segment for the set begins in position 14 of a detail data record.

See Batch Detail Data Record for a description of the fields in the batch detail data record.

Transaction Header Segment

Each detail data record in a batch file has one transaction header segment that identifies the transaction.

The transaction header segment:
- Specifies the NCPDP version number
- Identifies the type of transaction

Examples:

E1 for eligibility verification

B1 for a billing transaction

- Contains one of the five key fields that Sterling Gentran:Server uses to determine the Trading Partnership code for inbound translation.

The Transaction Code is the only key field in the transaction header segment that Sterling Gentran:Server uses to find the Trading Partnership code:

-

The structure of the transaction header segment indicates whether the transaction is a request or response.

- A Request Transaction Header Segment is a fixed-length 56-character segment containing 9 fields.
- A Response Transaction Header segment is a fixed-length 31-character segment containing 7 fields.

The transaction header segment is the only segment that does not have a segment identifier. The Transaction Code field in this segment is used to identify the transaction.

See Request Transaction Header Segment for a description of the fields in a Request Transaction Header segment. See Response Transaction Header Segment for a description of the fields in a Response Transaction Header segment.

Batch Trailer Segment

Each batch file has one trailer segment. The trailer segment ends the batch file.

The batch trailer segment is a positional segment with a length of 56 characters.

The trailer segment contains a Batch Number field that must have the same value as the Batch Number field in the batch transaction header segment.

See Batch Trailer Record or a description of the fields in the batch detail data record.

Chapter 3. Creating NCPDP Maps

The NCPDP Standard DDFs

The Standards DVD supplied with your Sterling Gentran:Server for Microsoft Windows product has a folder that contains translation objects for creating NCPDP data definition files (DDFs).

IBM provides these DDFs to help you develop your NCPDP maps quickly and efficiently.

The NCPDP transactions exist only in the NCPDP DDFs; they are not in the Standards database on the Standards DVD.

Each NCPDP DDF contains:
- All standard components for the NCPDP transaction (such as B1, B2, B3)
- The standard components required for batch transmissions (batch header, batch trailer)

Copying the NCPDP DDFs

We recommend that you copy the folder that contains the NCPDP data definition files to a subdirectory in the folder that holds your file definitions (*.DDF files) so that you can access them when you need them.

About this task

Use this procedure to copy the NCPDP DDF folder.

Procedure

1. Insert the Standards DVD into the drive on your machine.
2. Locate the NCPDP DDF folder on the DVD.
3. Copy the folder from the Standards DVD to the destination directory.

NCPDP Translation Set up Process

This table lists the stages in the process to set up your system to translate NCPDP data.

Stage	Description
1	Analyze the format of the NCPDP data. See Analyzing the NCPDP Data.
2	Create the NCPDP map. See Creating an Inbound NCPDP Map or Creating an Outbound NCPDP Map.
3	Define the input and output sides of the map. See the section on Structuring an NCPDP Map for instructions on structuring the NCPDP side of the map. See the *Sterling Gentran:Server Application Integration User Guide* for instructions on structuring the side of the map that is not an NCPDP format.
4	Create the NCPDP trading partner profile. See the section on Using Partner Editor with NCPDP for instructions.

Stage	Description
5	Set translation options for NCPDP data. See the *Sterling Gentran:Server Application Integration User Guide* for instructions.

Analyzing the NCPDP Data

Before you begin

Before you can create a map to translate data into a NCPDP standard format, you must analyze the NCPDP format that you want to use in the map. You will use the information you gather to create a Data Definition Format (DDF) file that defines the NCPDP format you expect to receive or send.

For more information about Data Definition Format files, see the *Sterling Gentran:Server Application Integration User Guide*.

About this task

Use this procedure to analyze NCPDP data.

Procedure

1. Obtain sample data that is in the NCPDP format you will send to or receive from the processor, intermediary, or provider (trading partner).
2. Analyze the sample data to determine the segment and element layouts and field lengths.
3. Find out which data elements the trading partner requires.
4. Determine the trading partner's ability to accept variable-length transactions and truncated data elements.
5. Determine the kind of data contained in each segment and element.
6. List the map components and layout information for your NCPDP Data Definition Format file.
7. When you build the NCPDP side of your map, add or delete optional fields and segments as necessary to accommodate your trading partner's requirements and those of your organization.

NCPDP Map Components

This diagram illustrates an example map that translates inbound data that is in NCPDP format into an application format.
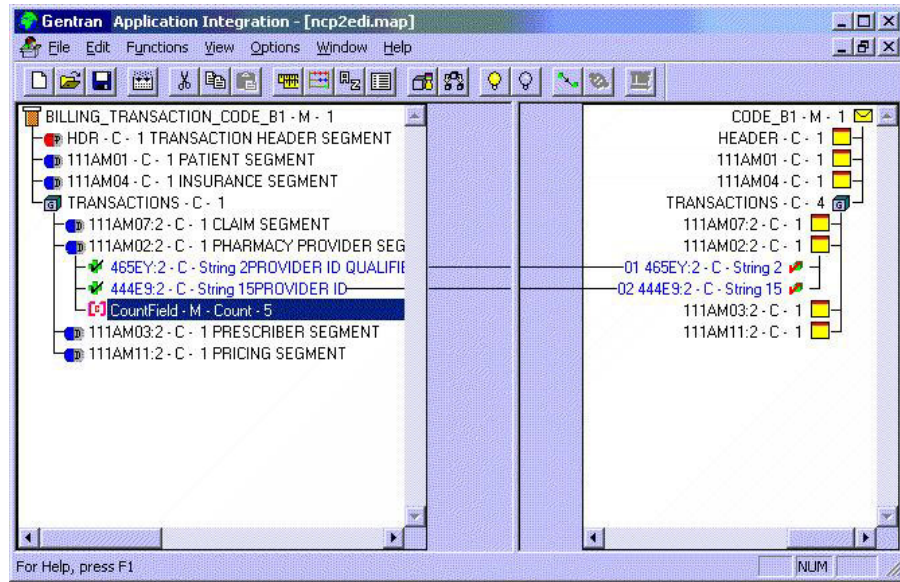
This table describes the icons that Sterling Gentran:Server uses to visually represent the NCPDP map components:

Icon	Description
	The NCPDP File Format icon (a pill bottle) identifies the NCPDP file. The file object is the primary component. All other map components are subordinate to the file object.
	A group icon indicates a looping structure that contains related segments and 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.
	A segment icon (a pill) identifies a segment. The left side of the icon is red and the right side contains a "P" if the segment is positional. The left side of the icon is blue and the right side contains a "D" if the segment is delimited.
	A field icon represents the smallest piece of information defined in an NCPDP standard. Fields usually do not have useful meaning until they are combined into segments. Fields can be positional (blue icon) or delimited (green icon). A red indicates an NCPDP data record.
	A linked field icon represents a field that is linked to an element or field on the opposite side of the map, or which has a standard rule attached to it.
	A count field icon represents a count field, which occurs once and contains a count of the loop that follows.
	A counter field icon represents a counter field, which occurs at the beginning of each occurrence of a looping set of fields.

Creating an Inbound NCPDP Map

After you analyze the NCPDP data you expect to receive from your trading partner, you are ready to create a map that will translate the NCPDP data into another format, such as your application format.

About this task

For more detailed instructions about creating maps, see the Creating a Map section in the *Sterling Gentran:Server Application Integration User Guide*.

The input side of your map must be generated by importing a data definition file (DDF) that describes the layout of the incoming file. We recommend that you use the appropriate DDF that IBM provided on your Standards DVD. The IBM DDFs contain the batch header and batch trailer segments as well as the transaction segments.

Use this procedure to create an NCPDP map.

Procedure

1. Start the Application Integration subsystem.
2. Select **File > New** to start the New Map Wizard.
3. Enter the following information and click **Next**.
   a. Select the appropriate map type (such as import, export).
   b. Type the unique name of the map, omitting the .MAP extension.
   c. Type your name if it differs from the user name that the system supplied.
4. Do one of the following:
   - To use an NCPDP DDF file that IBM provided, click **Load the data format from a saved definition** and then navigate to the DDF in the directory that you use to store your NCPDP file definitions.
   - To create an NCPDP map without using a DDF, click **Create a new data format using the syntax** and select **NCPDP**.
5. When prompted for the output format, select the appropriate options.
6. Click **Finish** to begin editing your map.
7. If you are creating a new data format, define the NCPDP map file, name it, and save it. See the section on Structuring an NCPDP Map for instructions.
8. If required, define the output format. You can name it and save it to use in another map.
9. Complete the map by setting standard or extended rules and linking components on the input and output sides.
10. Save the map.
11. Compile the map to create a translation object.

Creating an Outbound NCPDP Map

After you analyze the NCPDP format you send to your trading partner, you are ready to create a map that will translate your application (or other formatted) data into an NCPDP standard format.

About this task

For more detailed instructions about creating maps, see the Creating a Map topic in the *Sterling Gentran:Server Application Integration User Guide*.

The output side of your map must be a data definition file (DDF) that describes the layout of the output file. We recommend that you use the appropriate DDF that IBM provided on your Standards DVD. The IBM DDFs contain the batch header and batch trailer segments as well as the transaction segments.

Use this procedure to create an outbound NCPDP map.

Procedure

1. Start the Application Integration subsystem.
2. Select **File > New** to start the New Map Wizard.
3. Enter the following information and click **Next**.
    a. Select the appropriate map type (such as import, export).
    b. Type the unique name of the map, omitting the .MAP extension.
    c. Type your name if it differs from the user name that the system supplied.
4. Do one of the following:
    - To use an NCPDP DDF file that IBM provided, click **Load the data format from a saved definition** and then navigate to the DDF in the directory that you use to store your NCPDP file definitions.
    - To create an NCPDP map without using a DDF, click **Create a new data format using the syntax** and select **NCPDP**.
5. Click **Finish** to begin editing your map.
6. If required, define or edit the input format. You can name it and save it to use in another map. Then continue with Step 13.
7. If you are creating a new data format, define the NCPDP map file by inserting components and setting the properties. You can name it and save it to use in another map. See the section on Structuring an NCPDP Map for instructions.
8. Complete the map by adding standard and extended rules and linking components on the input and output sides.
9. Save the map.
10. Compile the map to create a translation object.

Chapter 4. Structuring an NCPDP Map

Requirements for Outbound NCPDP Maps

When creating an Outbound NCPDP map, you must use a standard or extended rule to update the Document database table (Document_tb) in your Sterling Gentran:Server database with the following information: update Appfield6 to Batch Header Number and ControlNumber to Transaction Reference Number.

The build process utilizes these values when creating the Batch Header, Batch Detail and Batch Trailer Segments for each batch, and if these values are not updated in the Document table, the build process pulls the values from the Outbound Envelope Information for that partner relationship.

The Unattended process also utilizes the value in Appfield6 of the Document Table to determine which transactions should be placed in the same batch. If there is no value in Appfield6 the unattended process places all transactions that are ready to send in the same batch.

See the *Sterling Gentran:Server Application Integration User Guide* for more information on standard and extended rules.

NCPDP Map Structure

In Sterling Gentran:Server, an NCPDP map consists of an NCPDP File object, batch segment objects, positional segment objects, delimited segment objects, and field objects. The segments in the transaction portion of a transmission must be contained in a group.

These are the basic segments in a batch transmission. You can have up to four transaction segments.
- Batch Header Segment
- Batch Detail Segment
- Transaction Header Segment
- Patient Segment
- Insurance Segment
- Transaction Segment
- Transaction Segment
- Transaction Segment
- Transaction Segment
- Batch Trailer Segment

There are two types of segments: positional and delimited.

These are positional (fixed-length) segments:
- Batch Header Segment
- Batch Detail Segment
- Transaction Header Segment
- Batch Trailer Segment

All other segments in an NCPDP transmission are delimited (variable-length) segments.

These are the types of fields that Sterling Gentran:Server supports for NCPDP transmissions:

- Number
- String
- Date/Time

Field Format Values

This table shows the NCPDP field format values that Sterling Gentran:Server supports:

Data Type	Data Format
Number	• XNumeric (0 - 9) - An unsigned numeric. Always right-justified and zero-filled. Corresponds to "N" format in the NCPDP Standard. • Overpunch (0 - 9) - A signed numeric with implied decimal position. The sign is internal and trailing; zero is always positive; field is always right-justified; and field contains a zero-filled dollar-cents amount with two positions to the right of the implied decimal point. All other positions are to the left of the implied decimal point. A dollar field with an Overpunch sign replaces the right-most digit in the field. Corresponds to "D" format in the NCPDP Standard. **Note:** Overpunch signs are used in dollar fields to represent positive and negative dollar amounts without expanding the size of the field to hold a plus or minus character. The right-most (least significant) digit of a dollar field must be an Overpunch sign, not a digit. The signed value designates the positive or negative status of the numeric value. For example: The dollar field of $99.95 is represented as 999E with truncation. A negative dollar amount of $2.50 is represented as 25} with truncation.
String	Free format (which indicates that any characters are acceptable in the field because the translator does not check the characters for compliance) or A/N (alpha numeric) format in the NCPDP Standard. Syntax token that defines a range of characters that are valid for a given field. These tokens are predefined: • X = A - Z, a - z, 0 - 9 plus a set of characters • A = A - Z, a - z • J = A- - Z, a - z, 0 - 9 plus a set of characters • N = 0 - 9 **Note:** To view a list of the defined syntax tokens, select Syntax Tokens from the Application Integration Edit menu. The system displays the Syntax Tokens dialog box, which displays the characters defined for each syntax token.
Date/Time	Date or time format. For example: • YYYYMMDD (used in NCPDP Standard) • YYMMDD • HHMMSS • HHMM

NCPDP File Properties Dialog Box

NCPDP File Properties - Name Tab

The NCPDP File Properties dialog box is used to define information that helps the translator identify different data structures in the Input or Output file. The information defined on this dialog box applies to the whole side of the map.

The Name tab is used to define the name of the root map object. This diagram illustrates the Name tab.
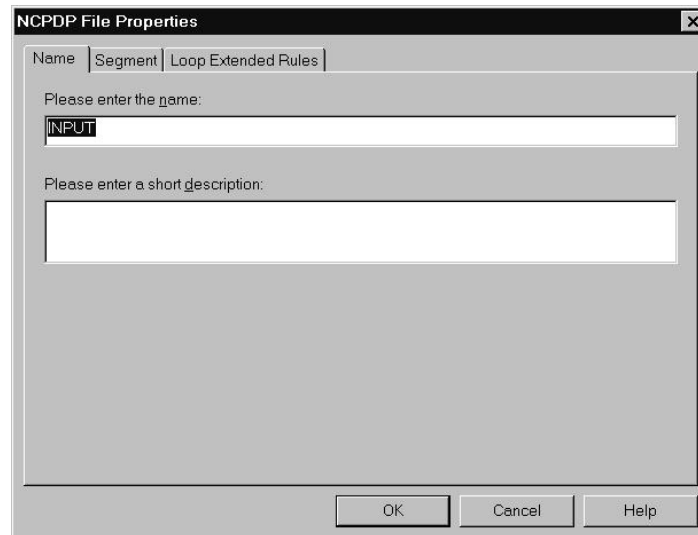
This table describes the parts of the Name tab.

Part	Function
Please enter the name	Defines the name of the root map object.
Please enter a short description	Describes the root map object.

NCPDP File Properties - Segment Tab

The Segment tab is used to specify segment separators and other structural information.

When NCPDP is on the Input side of a map, the translator uses this information to identify and validate data structures. When NCPDP is on the Output side of a map, the system uses the segment information to generate correct NCPDP data structures.

This diagram illustrates the Segment tab.

NCPDP File Properties

Name | Segment | Loop Extended Rules

Positional Segments
☑ Use Separators
1 [   ]   2 [   ]

Positional and Delimited Segments
☑ Stream Segments
☑ Uppercase Strings

Delimited Segments
☑ Specify Separators

Segment Separator: [0x1E]
Group Separator: [0x1D]
Field Separator: [0x1C]

Batch Segments
Start of Text: [0x02]
End of Text: [0x03]

Field ID Length: [2]   ☑ Truncate Data

OK   Cancel   Help
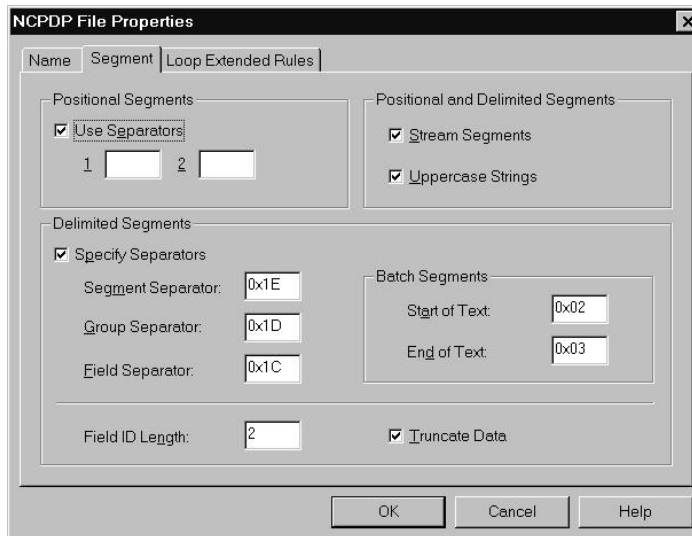
This table describes the parts of the Segment tab.

Part	Function
Positional Segments	
Use Separators	Indicates that a separator character marks the beginning of a positional segment. **Note:** If you define two separators, the translator will put them in front of all positional segments.
Positional and Delimited Segments	
Stream Segments	Turns streaming on and off. When this box is selected, each Output segment follows another, without a carriage return or line feed to separate them. **Note:** The default for NCPDP is streamed. If you deselect this checkbox, the translator will put a CR/LF at the beginning of each segment.
Uppercase Strings	For outbound data, this checkbox causes the system to convert all strings to uppercase characters. For inbound data, the system ignores this checkbox. **Note:** NCPDP requires all alphabetic characters to be uppercase.
Delimited Segments	
Specify Separators	Enables you to change the default separator characters used to delimit the data structures. **Important:** The NCPDP standard has required separator characters. When the User Separator checkbox is selected, Sterling Gentran:Server displays these separators in the appropriate boxes. We strongly recommend that you do NOT change these values. Only change these values if you are using a type of format other than NCPDP.
Segment Separator	Specifies the character used to separate segments. The default character is Ox1E.
Group Separator	Specifies the character used to separate groups. The default character is Ox1D.
Field Separator	Specifies the character used to separate fields. The default character is Ox1C.
Batch Segments	

Part	Function
Start of Text (STX)	Specifies the value that marks the start of the batch record within the file. **Note:** Defines the delimiter used to delineate the beginning of a batch segment.
End of Text (ETX)	Specifies the value that marks the end of the batch record within the file. **Note:** Defines the delimiter used to delineate the end of a batch segment.
Other fields	
Field ID Length	Specifies the length of the field identifier. Default value is 2 for delimited segments. **Note:** The field ID allows the translator to identify each field, no matter what order it is located in.
Truncate data	Turns data truncation on and off.△On the Output side of a map, if this checkbox is selected, the system removes leading zeros, fillers, padding, and spaces from data elements that are not mandatory. On the Input side of the map, it also removes trailing spaces.

NCPDP File Properties - Loop Extended Rules tab

The Loop Extended Rules tab is used to create extended rules at the file object level.

This table describes the parts of the Loop Extended Rules tab.

Part	Function
On Begin	Specifies that the extended rule is executed before the system processes the Input or Output side of the map.
On End	Specifies that the extended rule is executed after the system processes the Input or Output side of the map.
Full Screen	Maximizes the dialog box.
Compile	Compiles the extended rule. Displays any warnings or errors in the Errors list.
Extended rule	Defines the extended rule.
Errors	Displays any errors generated when you clicked Compile to compile the extended rule.

NCPDP Group Properties Dialog Box

NCPDP Group Properties - Name Tab

The NCPDP Group Properties dialog box is used to define information about a group structure in the file.

The Name tab is used to define the name of the group map object. This diagram illustrates the Name tab.
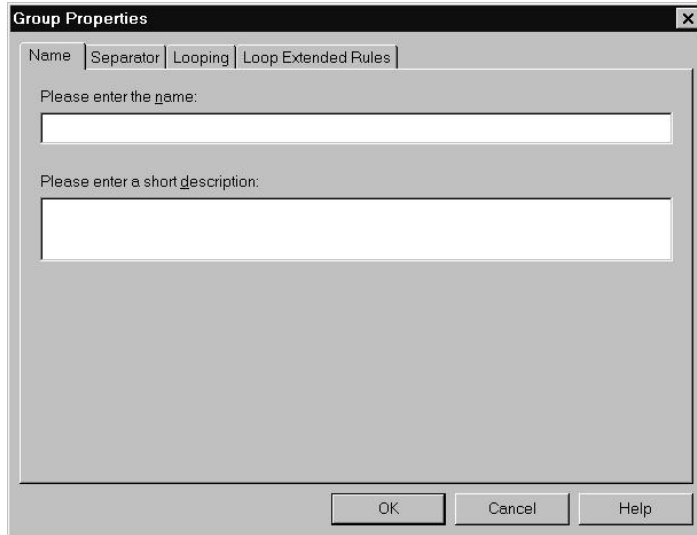
This table describes the parts of the Name tab.

Part	Function
Please enter the name	Defines the name of the group map object.
Please enter a short description	Describes the group map object.

NCPDP Group Properties - Separator Tab

The Separator tab is used to indicate whether or not the NCPDP Group Separator is used in the file.

This diagram illustrates the Separator tab.
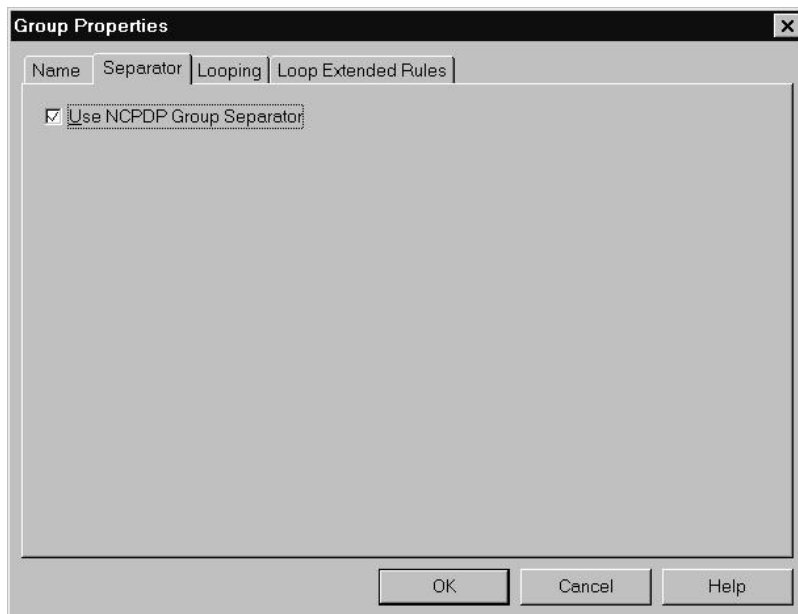
This table describes the parts of the Separator tab.

Part	Function
Use NCPDP Group Separator	Toggles the activation of the NCPDP Group Separator.
	If the group is on the Input side of a map, this checkbox causes the system to expect a group separator in the Input file at the beginning of each group.
	If the group is on the Output side of a map, this checkbox causes the system to insert a group separator in the Output file at the beginning of each occurrence of the group.

NCPDP Group Properties - Looping Tab

The Looping tab is used to specify that the group is part of a repeating (looping) structure.

This diagram illustrates the Looping tab.
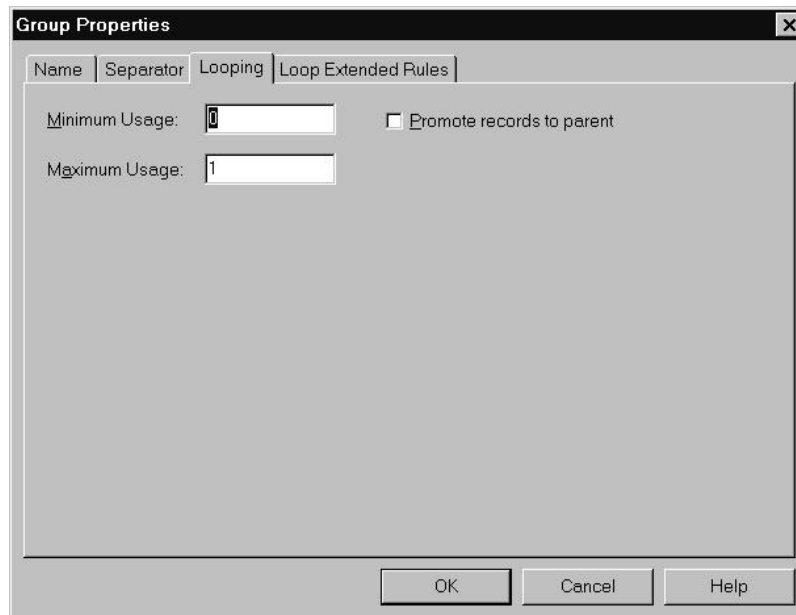
This table lists the parts of the Looping tab and their functions.

Part	Function
Minimum Usage	Specifies the minimum number of times the loop must be repeated.
Maximum Usage	Specifies the maximum number of times the loop can be repeated.
Promote records to parent	Indicates (if selected) that the subordinate records and groups should be extracted and located in the parent group when the group is compiled.

NCPDP Group Properties - Loop Extended Rules tab

The Loop Extended Rules tab is used to set extended rules for the group.

This diagram illustrates the Loop Extended Rules tab of the NCPDP Group Properties dialog box.
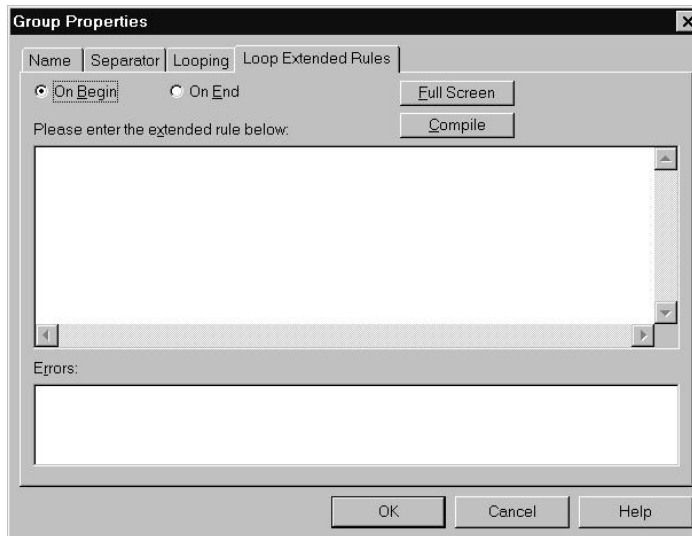
This table describes the parts of the Loop Extended Rules tab.

Part	Function
On Begin	Specifies that the extended rule is executed before the system processes each occurrence of the group.
On End	Specifies that the extended rule is executed after the system processes each occurrence of the group.
Full Screen	Maximizes the dialog box.
Compile	Compiles the extended rule. Displays any warnings or errors in the Errors list.
Extended rule	Defines the extended rule.
Errors	Displays any errors generated when you clicked Compile to compile the extended rule.

NCPDP Positional Segment Properties Dialog Box

NCPDP Positional Segment Properties - Name Tab

The NCPDP Positional Segment Properties dialog box is used to define information about a positional segment.

The Name tab is used to define the name of the map object. This diagram illustrates the Name tab.
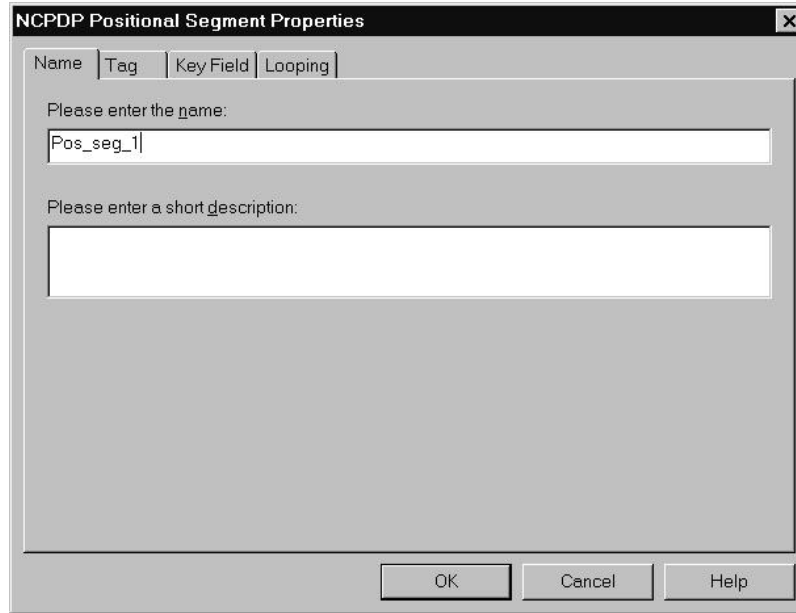
This table describes the parts of the Name tab.

Part	Function
Please enter the name	Defines the name of the positional segment.
Please enter a short description	Describes the positional segment.

NCPDP Positional Segment Properties - Tag Tab

The Tag tab is used to define the segment identifier or transaction code associated with the positional segment. The translator uses the tag to correctly associate a segment in the Input file with its corresponding map segment.

Note: You must define a tag for inbound-side positional segments. This option is not used for Output-side positional segments.

This diagram illustrates the Tag tab.

This table describes the parts of the Tag tab.

Part	Function
Transaction Code	Used to specify a value that Sterling Gentran:Server can use to identify the segment in the Input file. • For header segments, this box is used to specify the NCPDP Transaction Code associated with the positional segment. • For batch segments, this box is used to specify the segment identifier.
Position	For the Input side of a map, specifies the character position in the data (starting from 1) where the Transaction Code or segment identifier is located. This is used to identify the segment. **Note:** This option is not used for segments on the Output side of a map.
This is a batch segment	Indicates that the segment is a Batch Header Segment, Batch Detail Data Segment, or Batch Trailer Segment. When you select this checkbox for a batch segment on the Output side of a map, this option causes the translator to insert a start-of-text (STX) character at the beginning of the segment and an end-of-text (ETX) character at the end of the segment.

NCPDP Positional Segment Properties - Key Field Tab

The Key Field tab is used to specify a second qualification in selecting a segment. (The segment name is the first qualification).

This diagram illustrates the Key Field tab.

This table describes the parts of the Key Field tab.

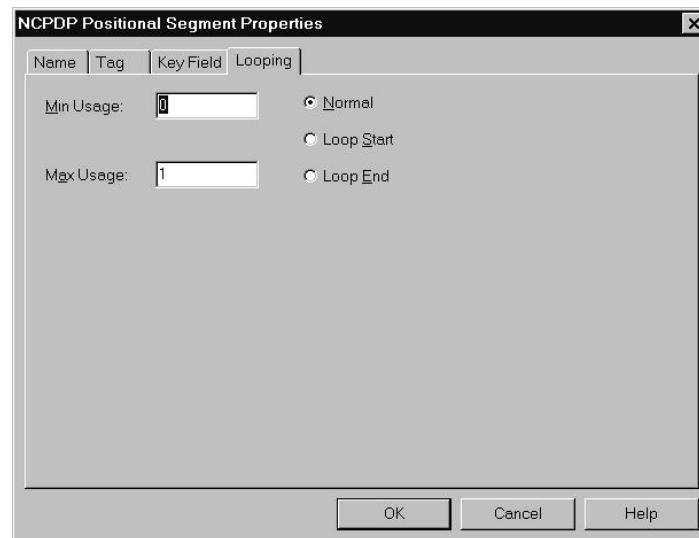| Part	Function
Field	Specifies the key field for this segment. The translator uses this value in addition to the tag as criteria to use when it is matching a data segment from an Input file to a map segment.
Matching rules (Input side of map only)	

Part	Function
Use constant	Indicates that a constant is used as a matching rule. The list is used to select the constant. The Edit button is used to display the Map Constants dialog box.
Use codelist	Indicates that a codelist is used as a matching rule. The list is used to select the codelist. The Edit button is used to display the Code Lists dialog box.
Match record when key does not match	Instructs the system to ignore the specified key field when matching a data segment from the Input file to a map segment.

NCPDP Positional Segment Properties - Looping tab

The Looping tab is used to specify that the segment is part of a repeating (looping) structure.

This diagram illustrates the Looping tab.

This table describes the parts of the Looping tab.

Part	Function
Minimum Usage	Specifies the minimum number of times the segment must be repeated.
Maximum Usage	Specifies the maximum number of times the segment can be repeated.
Normal	Not applicable to NCPDP.
Loop Start	Not applicable to NCPDP.
Loop End	Not applicable to NCPDP.

NCPDP Positional Field Properties Dialog Box

NCPDP Positional Field Properties - Name tab

The NCPDP Positional Field Properties dialog box is used to define information about a positional field.

The Name tab is used to define the name of the positional field. This diagram illustrates the Name tab.
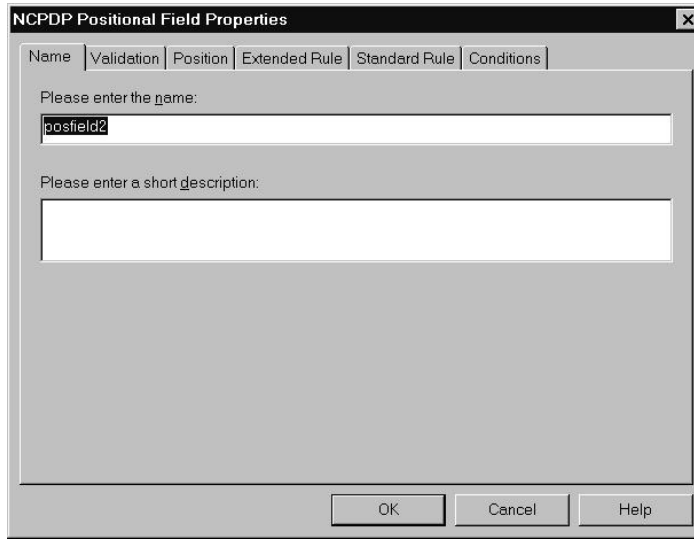
This table describes the parts of the Name tab.

Part	Function
Please enter the name	Defines the name of the map object.
Please enter a short description	Describes the map object.

NCPDP Positional Field Properties - Validation tab

The Validation tab is used to set the field's data type, data format, and minimum and maximum length.

This diagram illustrates the Validation tab.

This table describes the parts of the Validation tab.

Part	Function
Check here if this field is mandatory	Indicates that this field is required.
Minimum (field length)	Specifies the minimum length of this field.
Maximum (field length)	Specifies the maximum length of this field.
Please choose the data-type of this field	Specifies the field's data type: • String • Number • Date/Time
Please choose the format of the data in this field	Specifies the data format. The available formats are based on the data type. **String:** X **Number:** • Overpunch **Note:** The Overpunch format specifies that the last digit represents the sign (value) of the number). • Xnumeric • The Xnumeric format specifies that a space is reserved to the right of the number for a space (if the number is positive) or a minus sign (if the number is negative). • N0 - N9 **Date:** YYYYMMDD
Data is read/written as raw bytes	Not used for NCPDP.
use little-endian byte ordering	Not used for NCPDP.
use big-endian byte ordering	Not used for NCPDP.
Width	Not used for NCPDP.

NCPDP Positional Field Properties - Position tab

The Position tab is used to set information about the position of the field in the positional segment.

This diagram illustrates the Position tab.
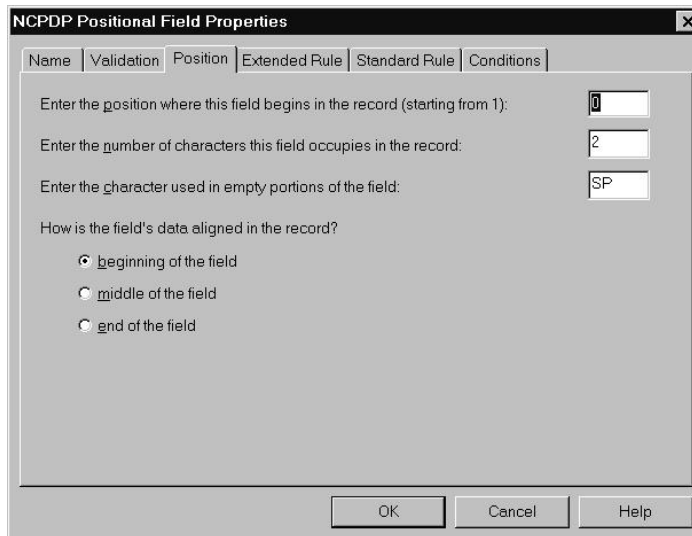
This table describes the parts of the Position tab.

Part	Function
Enter the position where this field begins in the record (starting from 1)	Specifies the starting position of this field.
Enter the number of characters this field occupies in the record	Specifies the length of this field.
Enter the character used in empty portions of the field	Specifies the type of character used to occupy blank portions of the field. To use this field, type the character you want to use as the padding character. For example, type 0 (zero) to pad the field with zeros. Press the space bar to use a space in empty portions of the field. The system displays SP in the box.
How is the field's data aligned in the record?	Indicates how the data is aligned: • beginning of the field = left-aligned • middle of the field = centered • end of the field - right-aligned

NCPDP Positional Field Properties - Extended Rule tab

The Extended Rule tab is used to specify an extended rule for this map object.

This diagram illustrates the Extended Rule tab.

This table describes the parts of the Extended Rule tab.

Part	Function
Please enter the extended rule below	Enables you to enter the extended rule you want to use for this field.
Errors	Displays any errors that result when you compile this extended rule.
Full Screen	Maximizes the dialog box.
Compile	Compiles the extended rule. Displays any warnings or errors in the Errors list.

NCPDP Positional Field Properties - Standard Rule tab

The Standard Rule tab is used to specify a standard rule for this map object.

This table describes the parts of the Standard Rule tab.

Part	Function
Please select the standard rule to use	Specifies the standard rule to use for this field.

NCPDP Positional Field Properties - Conditions tab

The Conditions tab is used to set relational conditions to connect fields together for syntax or compliance reasons.

This diagram illustrates the Conditions tab.

This table describes the parts of the Conditions tab.

Part	Function
Please choose the type of relationship to use	Specifies the type of relationship between this field and another field. • Paired/Multiple - If any of the specified fields are present, then all fields must be present. • Required. - At least one of the specified fields must be present. • Exclusion - No more than one of the specified fields may be present. • Conditional - If the first Condition field is present, the rest of the fields must also be present. • List Conditional - If the first Condition field is present, at least one of the specified fields must also be present.
Please select the condition field	Used to select the first field from the Condition field list. This is the field on which the conditional relationship is based. This field is active only when the type of relationship is Conditional or List Conditional.
Available fields	Lists the fields in the map that can be used in the relationship.
Fields used in relationship	Specifies the fields used in the relationship. You build this list by selecting fields in the Possible Fields list and then clicking the Add button.

NCPDP Delimited Segment Properties Dialog Box

NCPDP Delimited Segment Properties - Name tab

The NCPDP Delimited Segment Properties dialog box is used to define information about a delimited segment.

The Name tab is used to define the name of the delimited segment map object. This diagram illustrates the Name tab.
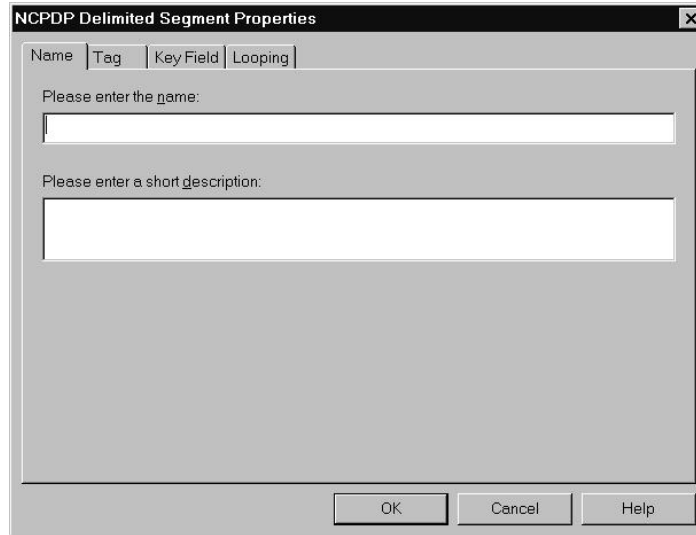
This table describes the parts of the Name tab.

Part	Function
Please enter the name	Defines the name of the map object.
Please enter a short description	Describes the map object.

NCPDP Delimited Segment Properties - Tag tab

The Tag tab is used to define the segment identifier and segment ID value associated with the delimited segment in the map.

This diagram illustrates the Tag tab.
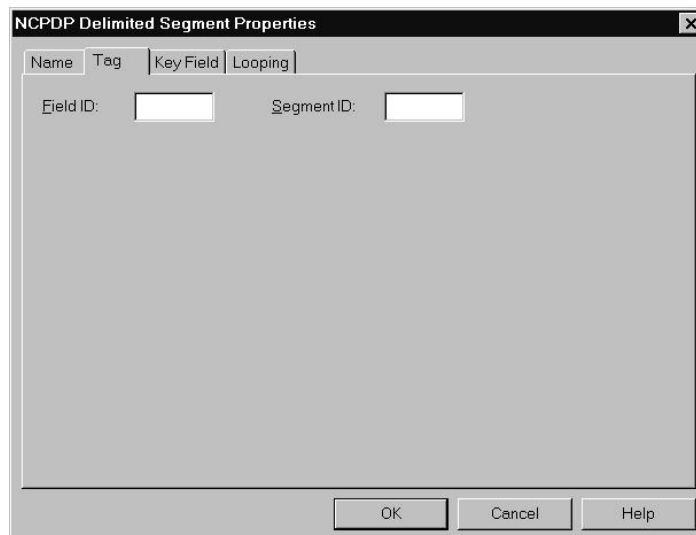
This table describes the parts of the Tag tab.

Part	Function
Field ID	Specifies the Field ID of the field that contains the segment identifier, which is either what you expect or what you want generated. See the NCPDP standards for values. **Note:** Every delimited field has a field ID.
Segment ID	Specifies the Segment ID of the segment. See the NCPDP standards for values.

NCPDP Delimited Segment Properties - Key Field tab

The Key Field tab is used to specify a second qualification in matching a segment in the Input file with the segment in the map. (The segment name is the first qualification.)

This diagram illustrates the Key Field tab.
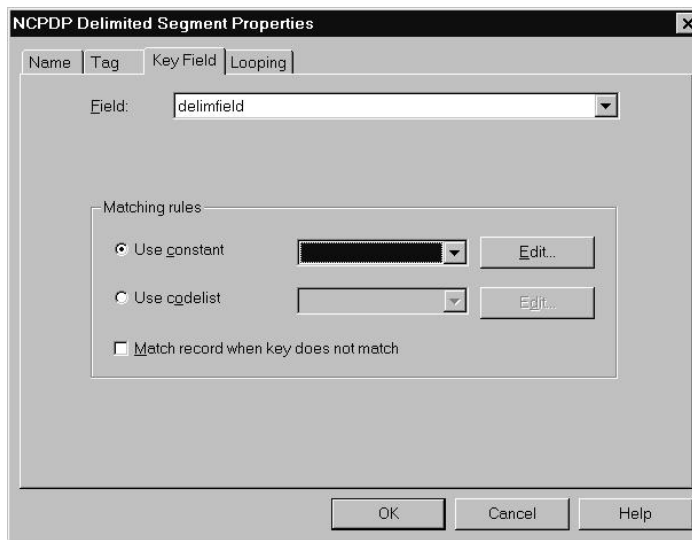
This table describes the parts of the Key Field tab.

Part	Function
Field	Selects the field to be used as the key field in this segment.
Use constant	Indicates (if selected) that a constant is used as a matching rule. The list is used to select the constant. The Edit button displays the Map Constants dialog box.
Use codelist	Indicates (if selected) that a codelist is used as a matching rule. The list is used to select the codelist. The Edit button displays the Code Lists dialog box.
Match record when key does not match	Instructs the system to ignore the specified key field when matching a data segment from the Input file to a map segment.

NCPDP Delimited Segment Properties - Looping tab

The Looping tab is used to specify that the segment is part of a repeating (looping) structure.

This diagram illustrates the Looping tab.
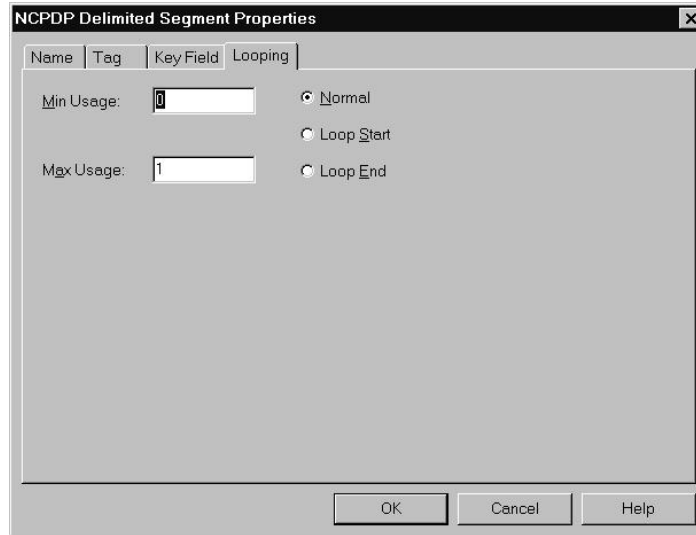
This table describes the parts of the Looping tab.

Part	Function
Min Usage	Specifies the minimum number of times the segment must be repeated.
Max Usage	Specifies the maximum number of times the segment can be repeated.
Normal	Not applicable to NCPDP.
Loop Start	Not applicable to NCPDP.
Loop End	Not applicable to NCPDP.

NCPDP Delimited Field Properties Dialog Box

NCPDP Delimited Field Properties - Name tab

The NCPDP Delimited Field Properties dialog box is used to define information about a delimited field.

The Name tab is used to define the name of the delimited field map object. This diagram illustrates the Name tab.
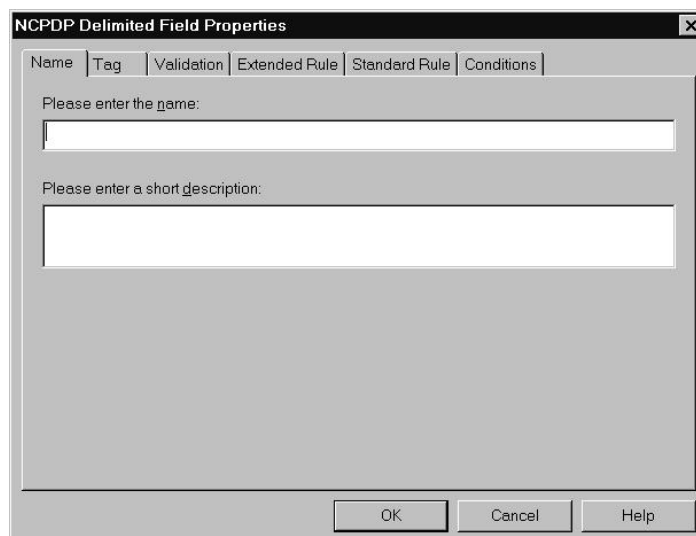
This table describes the parts of the Name tab.

Part	Function
Please enter the name	Defines the name of the map object.
Please enter a short description	Describes the map object.

NCPDP Delimited Field Properties - Tag tab

The Tag tab is used to define the field identifier associated with the delimited field.

This diagram illustrates the Tag tab.

This table describes the parts of the Tag tab.

Part	Function
Field ID	Specifies the field identifier for this individual field.
Fixed Order	Indicates (if selected) that this field must occur in the order specified within the segment. **Note:** If this checkbox is selected, the translator will generate an error if the field appears, for example, in the first position in the map but the third position in the data.

NCPDP Delimited Field Properties - Validation tab

The Validation tab is used to set the field's data type, format, and minimum and maximum lengths.

This diagram illustrates the Validation tab.

This table describes the parts of the Validation tab.

Part	Function
Check here if this field is mandatory	Indicates that this field is required.
Minimum (field length)	Specifies the minimum length of this field.
Maximum (field length)	Specifies the maximum length of this field.
Please choose the data-type of this field	Specifies the field's data type: • String • Number • Date/Time
Please choose the format of the data in this field	Specifies the data format.
Data is read/written as raw bytes	Not applicable to NCPDP.
use little-endian byte ordering	Not applicable to NCPDP.
use big-endian byte ordering	Not applicable to NCPDP.
Width	Not applicable to NCPDP.

NCPDP Delimited Field Properties - Extended Rule tab

The Extended Rule tab is used to specify an extended rule for this field.

This diagram illustrates the Extended Rule tab.

This table describes the parts of the Extended Rule tab.

Part	Function
Please enter the extended rule below	Enables you to enter the extended rule you want to use for this field.
Errors	Displays any errors that result when you compile this extended rule.
Full Screen	Maximizes the dialog box.
Compile	Compiles the extended rule. Displays any warnings or errors in the Errors list.

NCPDP Delimited Field Properties - Standard Rule tab

The Standard Rule tab is used to specify a standard rule for this map object.

This diagram illustrates the Standard Rule tab.
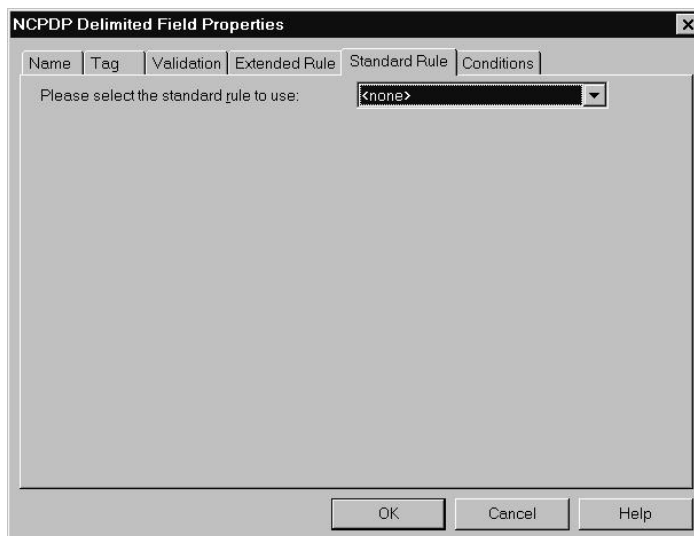
This table describes the parts of the Standard Rule tab.

Part	Function
Please select the standard rule to use	Specifies the standard rule to use for this field.

NCPDP Delimited Field Properties - Conditions tab

The Conditions tab is used to select relational conditions to connect parts for syntax or compliance reasons.
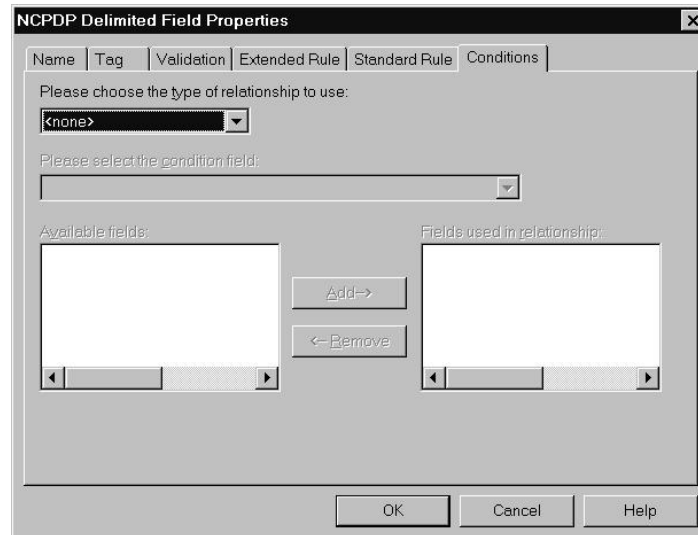
This diagram illustrates the Conditions tab.

This table describes the parts of the Conditions tab.

Part	Function
Please choose the type of relationship to use	Selects the type of relationship between this field and another field.
Please select the condition field	Specifies the other field in the relationship.
Available fields	Lists the fields that can be used in the relationship.
Fields used in relationship	Specifies the fields used in the relationship.

NCPDP Count Field Properties Dialog Box

NCPDP Count Field Properties - Name tab

The Count Properties dialog box is used to set the properties of a count field.

Note: A count field can contain fields that loop.

The Name tab is used to define the name of the count field. It is also used to describe the field. This diagram illustrates the Name tab.

This table describes the parts of the Name tab.

Part	Function
Please enter the name	Defines the name of the count field.
Please enter a short description	Describes the count field.

NCPDP Count Field Properties - Tag tab

The Tag tab is used to define the field identifier associated with the count field.

This diagram illustrates the Tag tab.
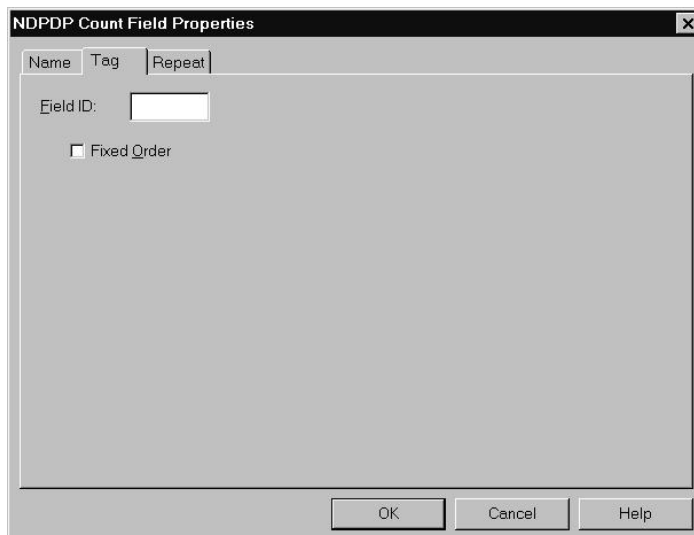
This table describes the parts of the Tag tab.

Part	Function
Field ID	Specifies the field identifier for this field. **Note:** Every count field must have a Field ID.

Part	Function
Fixed Order	Indicates (if selected) that this field must occur in the order specified within the segment. **Note:** This is mandatory for NCPDP.

NCPDP Count Field Properties - Repeat tab

The Repeat tab is used to set the minimum and maximum times that this count field can repeat (loop).

This diagram illustrates the Repeat tab.

This table describes the parts of the Repeat tab.

Part	Function
Minimum Usage	Specifies the minimum number of times this field repeats.
Maximum Usage	Specifies the maximum number of times this field repeats.
Treat this field as a repeating field	Indicates that this field is a repeating (looping) field.

NCPDP Counter Field Properties Dialog Box

NCPDP Counter Field Properties - Name tab

The Counter Field Properties dialog box is used to set the properties of a counter field.

The Name tab is used to define the name of the counter field. It is also used to describe the field. This diagram illustrates the Name tab.
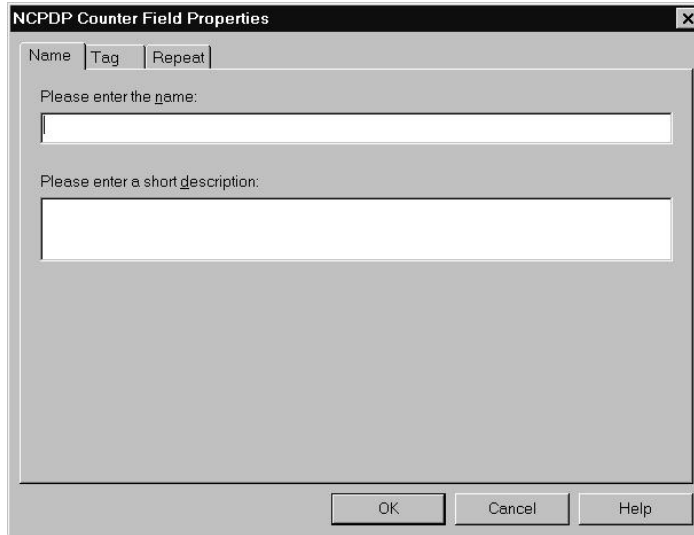
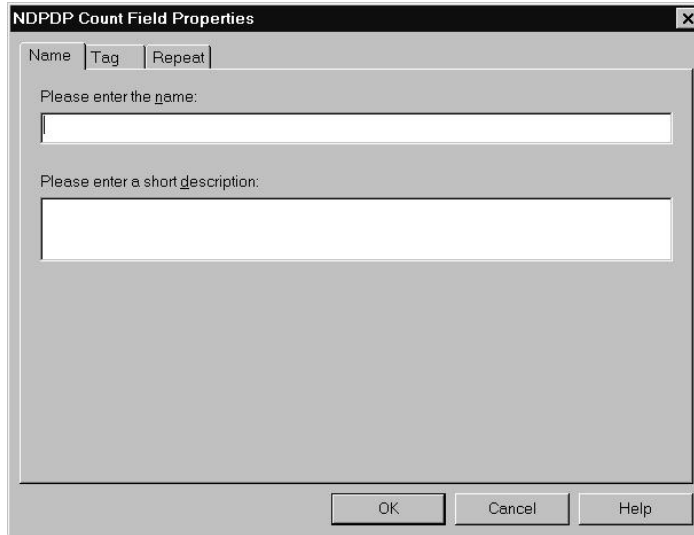This table describes the parts of the Name tab.

Part	Function
Please enter the name	Defines the name of the counter field.
Please enter a short description	Describes the map object.

NCPDP Counter Field Properties - Tag tab

The Tag tab is used to define the field identifier associated with the counter field.

This diagram illustrates the Tag tab.

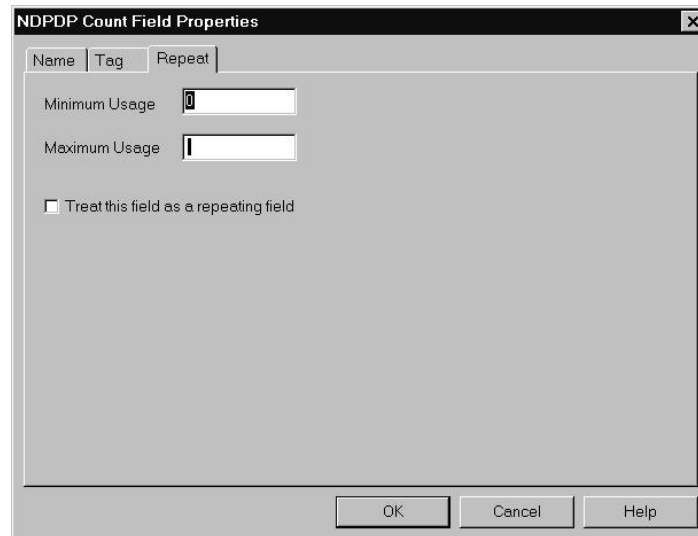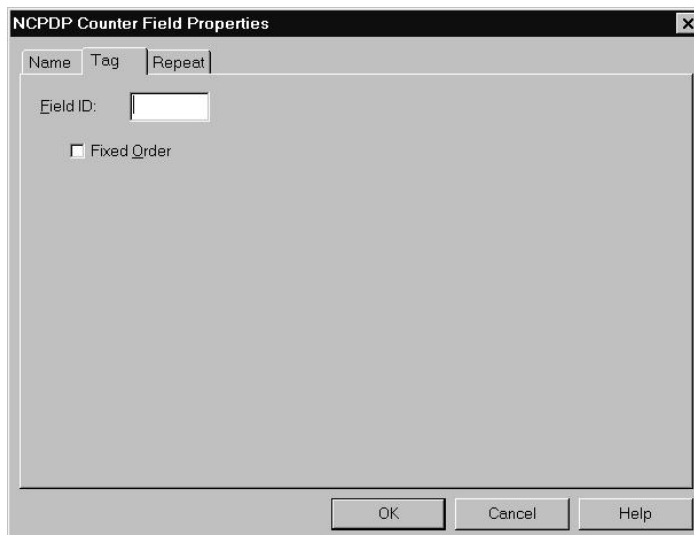This table describes the parts of the Tag tab.

Part	Function
Field ID	Specifies the field identifier for this field. **Note:** Every counter field must have a Field ID.

Part	Function
Fixed Order	Indicates (if selected) that this field must occur in the order specified within the segment. **Note:** This is mandatory for NCPDP.

NCPDP Counter Field Properties - Repeat tab

The Repeat tab is used to set the minimum and maximum times that this counter field can repeat (loop).
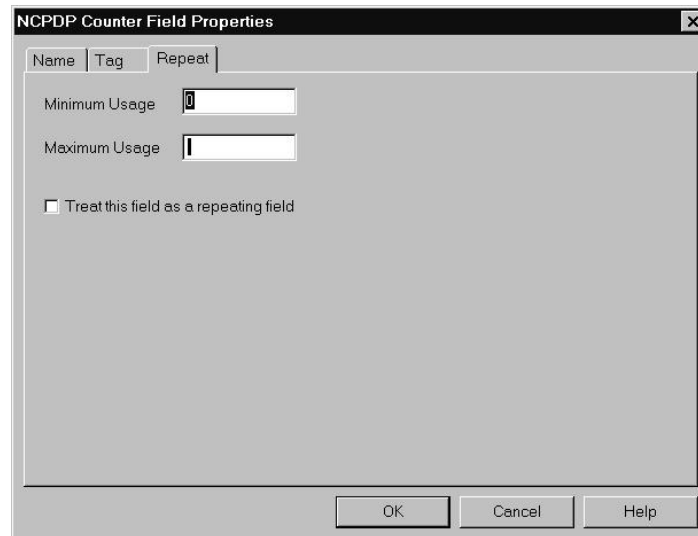
This diagram illustrates the Repeat tab.

This table describes the parts of the Repeat tab.

Part	Function
Minimum Usage	Specifies the minimum number of times this field repeats.
Maximum Usage	Specifies the maximum number of times this field repeats.
Treat this field as a repeating field	Indicates that is field is a repeating (looping) field.

How to Define an NCPDP Batch File

There are two methods of creating the map components for an NCPDP batch file:
- Loading an NCPDP DDF
- NCPDP Map Component Creation Process

Loading an NCPDP DDF

The simplest way to create the NCPDP side of your map is to load the appropriate NCPDP DDF that IBM supplied with your Sterling Gentran:Server product. Each DDF contains the required batch components as well as the transaction components. After you load the DDF, you can add, cut, and modify components to meet your needs.

About this task

See Copying the NCPDP DDFs for more information.

Use this procedure to copy components from a translation object.

Procedure

1. Start the NCPDP map in the Application Integration mapper.
2. When prompted for the format, select **Load the data format from a saved definition** and navigate to the appropriate NCPDP DDF.

   See the section on Creating NCPDP Maps for instructions.
3. Complete the NCPDP map by modifying components as necessary and linking input fields to output fields.

   Note: To modify a map component, right-click the map component you want to modify and select **Properties**.

   See the Map Design section of the *Sterling Gentran:Server Application Integration User Guide* for detailed instructions on modifying map components.
4. Save your changes.
5. Compile the map to create a translation object.

NCPDP Map Component Creation Process

This topic describes the process of defining the NCPDP components in a map.

This table describes the process for manually creating NCPDP map components.

Stage	Description
1	Set the NCPDP File Properties. See Configuring NCPDP File Properties for instructions.
2	Create the batch header. See Creating the Batch Header Segment for instructions.
3	Create the groups. See Creating a Group for instructions.
4	Create the batch detail segment. See Creating the Batch Detail Data Segment for instructions.
5	Create the transmission header segment. See Creating a Transaction Header Segment for instructions.
6	Create the transmission segments. See Creating the Batch Trailer Segment for instructions.
7	Create the transaction groups. See Creating a Group for instructions.
8	Create the transaction segments (for example, Patient segment, Insurance segment) within the groups. See Creating a Positional Segment and Creating a Delimited Segment for instructions.
9	Create the fields. See How to Create a Positional Field, Creating a Delimited Field, and Creating a Count Field, and Creating a Counter Field for instructions.
10	Create the batch trailer. See Creating the Batch Trailer Segment for instructions.

Configuring NCPDP File Properties

When the NCPDP file object is on the input side of the map, the translator uses the properties to parse and validate input data. When the NCPDP file object is on the output side, the translator uses the properties to structure the output.

About this task

Use this procedure to set the NCPDP File Properties.

Procedure

1. Right-click the NCPDP file icon and select **Properties**.

   The system displays the NCPDP File Properties Dialog Box.

2. On the **Name** tab, type the name and description of the root NCPDP map object.

3. Select the **Segment** tab to choose settings that enable the translator to either identify and validate data structures in the NCPDP input file or structure the NCPDP output file.

4. In the Positional Segments section, do one of the following:

   - To delimit positional segments, leave the **Use Separators** checkbox blank. This is the default setting for NCPDP.
   - To delimit positional segments (use separators to mark the beginning of the segment), select **Use Separators** and type the separator characters in boxes 1 and 2.

   For example: If you want to delimit positional segments with a carriage return and line feed, specify the carriage return character in box 1 (0x0D) and the line feed character in box 2 (0x0A).

5. If the file object is on the input side of the map, do you expect each input segment to follow another, without a carriage return or line feed to separate them? If the file object is on the output side of the map, do you want output segments structured this way?

   - If yes, select **Stream Segments**. (We recommend this option.)
   - If no, continue with the next step.

     If you do not select this checkbox, Sterling Gentran:Server assumes that each segment starts with a carriage return or line feed.

6. To have the translator change mixed-case characters to all uppercase characters (valid on the output side of the map only), select **Uppercase Strings**.

7. In the Delimited Segments section, select **Specify Separators**.

   The system displays the default separator characters for NCPDP data in the appropriate boxes.

8. In the Batch Segments section, accept the default values in the Start of Text and End of Text boxes. These values mark the beginning and ending of the batch segment within the file.

9. Accept the Field ID Length setting (2) as the length of the field identifiers.

10. To truncate the output data (removing leading zeros, fillers, padding, and leading spaces), select **Truncate Data**.

    Note: Make sure that your trading partner accepts truncated data.

11. To set extended rules at the File level, do the following. Otherwise, continue with step 12.

a. On the **Loop Extended Rules** tab, select either **On Begin** or **On End** to indicate when you want the extended rule executed (before the system processes the file or after processing).

b. Type the extended rule.

c. Click **Compile** to compile the extended rule.

d. Resolve any errors displayed in the Errors portion of the dialog box.

12. Click **OK** to save your changes.

Creating the Batch Header Segment

The batch header segment is a positional segment that contains the Sender ID and Receiver ID. Each file can have only one batch header segment.

About this task

Note: For inbound transmissions, you must map the Batch Number field in the batch header. This is necessary because you must use the same value in the Batch Response Header segment.

Use this procedure to create the batch header segment in the NCPDP side of a map.

Procedure

1. Right-click the NCPDP file icon and select **Create Sub > Positional Segment**. The system displays the NCPDP Positional Segment Properties Dialog Box.

2. On the **Name** tab, type the segment name.

3. Type a description of the segment and click **OK** to save your changes.

4. On the **Tag** tab, do the following:

   - Type **00** in the Transaction Code box. This is the segment identification code for a batch header.
   - Type **0** (the default value) in the Position box. This is the position of the segment identifier within the segment.
   - Select **This is a batch segment**.

   Important: You must define the tag for an Input segment.

5. Click **OK** to save your changes.

Creating a Group

In an NCPDP map, a transaction is represented by a map group. A group contains related segments, groups, or both that repeat in sequence until either the data ends or the maximum number of times that the loop is allowed to repeat is exhausted. The system permits up to four repetitions.

About this task

In NCPDP transmissions, a group separator character indicates the start of a transaction (except for Eligibility Verification transactions). You can choose to have Sterling Gentran:Server insert the NCPDP group separator character when you create or modify a map group.

See Separator Characters for more information.

Use this procedure to create a group in a map.

Procedure

1. Select the map component that precedes the group you are creating in the file layout.
2. Depending on the level, select **Edit > Create Sub > Group** or **Edit > Insert > Group**.

    The system displays the NCPDP Group Properties Dialog Box.
3. On the **Name** tab, type the name of the group, such as the transaction name.

    Note: Do not use spaces or dashes (-) in the group name. You can use the underscore (_) to separate words.
4. Type a description of this group and click **OK**.
5. To automatically insert the NCPDP group separator before the data in this group, click the **Separator** tab and select **Use NCPDP Group Separator**. Then click **OK**.
6. Select the **Looping** tab.
7. Type the minimum number of times the loop must be repeated.

    Note: For a conditional loop, the minimum usage should always be 0. For a mandatory loop, the minimum usage should be 1 or greater.
8. Type the maximum number of times the loop can be repeated.
9. For a single iteration group: To specify that the subordinate records and groups should be extracted and located in the parent group when the group is compiled, select **Promote records to parent** and click **OK**. If you do not want to specify that the subordinate records and groups should be extracted, click **OK**.
10. For a multi-iteration group: To specify an extended rule for this group, click the **Loop Extended Rules** tab and enter the extended rule. Click **OK** to save your changes.

     The system displays the Loop Extended Rules tab.
11. Click **OK** to create the group.

Creating the Batch Detail Data Segment

The batch detail data segment is a positional segment that contains the Transaction Reference Number. In a Sterling Gentran:Server NCPDP map, this segment contains only two fields - Segment Identifier and Transaction Reference Number.

About this task

In your map, the NCPDP Data Record described in the NCPDP Standard for a Detail Data Record follows the Batch Detail Data Segment. The Data Record begins with a Transaction Header Segment.

For inbound transmissions, you must map the Transaction Reference Number field. This is because you have to use the same number when you send the outbound response.

See Creating a Transaction Header Segment for instructions.

Use this procedure to create a batch detail data segment in the NCPDP side of a map.

Procedure

1. Right-click the icon for the batch header segment and select **Insert/Positional Segment**.

   The system displays the NCPDP Positional Segment Properties Dialog Box.
2. On the **Name** tab, type the segment name.
3. Type a description of the segmentand click **OK** to save your changes.
4. On the **Tag** tab, do the following:
   - Type **G1** in the Transaction Code box. This is the segment identification code for a batch detail segment.
   - Type **0** (the position of the segment identifier within the segment) in the Position box.
   - Select **This is a batch segment**.
5. Click **OK** to save your changes.

Creating a Transaction Header Segment

A Transaction Header segment is a positional segment that indicates if the transaction is a request or response. This header segment contains one field that Sterling Gentran:Server uses to determine the Trading Partnership code for inbound translation.

About this task

Each Batch Detail Data record has only one transaction header. In your map, the Transaction Header segment immediately follows the Batch Detail Data segment.

Use this procedure to create a Transaction Header segment in the NCPDP side of a map.

Procedure

1. Right-click the icon for the batch detail data segment and select **Insert/Positional Segment**.

   The system displays the NCPDP Positional Segment Properties Dialog Box.
2. On the **Name** tab, type the segment name.
3. Type a description of the segment and click **OK** to save your changes.
4. On the **Tag** tab, do the following:
   - Type the NCPDP transaction code (such as E1, B1, B2) in the Transaction Code box.
   - Type the starting position of the Transaction Code in the Position box.
5. Click **OK** to save your changes.

Creating the Batch Trailer Segment

The Batch Trailer segment is a positional segment that contains the total number of segments in the batch, including the Batch Header and Batch Trailer segments. This segment also contains a message field that can be used to include information about the batch transmission. Each file can have only one Batch Trailer segment.

About this task

Use this procedure to create the batch header segment in the NCPDP side of a map.

Procedure

1. Right-click the last icon on the NCPDP side of the map and select **Insert/Positional Segment**.

   The system displays the NCPDP Positional Segment Properties Dialog Box.

2. On the **Name** tab, type the segment name.

3. Type a description of the segment and click **OK** to save your changes.

4. Click the **Tag** tab.

5. Select **This is a batch segment**.

6. Type **99** in the Transaction Code box. This is the segment identification code for a batch trailer.

7. Type the starting position of the Segment Identifier in the **Position** box.

8. Click **OK** to save your changes.

Creating a Positional Segment

The fields in positional segments are always in fixed positions and do not require separators. The NCPDP Positional Segment Properties tab enables you to specify an identifying value for a positional segment, the loop usage and type, and constants.

About this task

Use this procedure to create a positional segment in the NCPDP side of a map.

Procedure

1. Select the map component which precedes the segment you are creating.

2. Select **Edit > Create Sub > Positional Segment** or **Edit > Insert > Positional Segment**, depending on the level of the selected map component.

   The system displays the NCPDP Positional Segment Properties Dialog Box.

3. On the Name tab, type the segment name.

   Note: If a segment occurs more than once in a map 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 map.

4. Type a description for the segment.

5. To specify an identification tag for this segment, select the **Tag** tab and enter the segment identification code.

   Note: You must define the tag for an input segment.

6. To use a key field, select the **Key Field** tab and complete the appropriate fields.

7. If the segment is a looping structure, select the **Looping** tab. Otherwise, accept the defaults and click **OK**.

8. Type the minimum amount of times the segment must repeat.

   Note: If the Min Usage box contains a 0, the segment is conditional. If the Min Usage box contains a 1 or greater, the segment is mandatory.

9. If you want the segment to repeat (loop), type the maximum amount of times it can repeat.

10. Click **OK** to save changes to the segment.

Creating a Delimited Segment

The Patient, Insurance, Claim, Pharmacy Provider, and other transaction-level segments are delimited segments. Delimited segments and their fields require separators because their lengths are variable. The NCPDP Delimited Segment Properties dialog box enables you to create a delimited segment.

About this task

Use this procedure to create a delimited segment in the NCPDP side of a map.

Procedure

1. Depending on the level of the selected map component, right-click on the map component that precedes the segment you are creating and select either **Create Sub > Delimited Segment** or **Insert > Delimited Segment**.

   The system displays the NCPDP Delimited Segment Properties Dialog Box.

2. On the Name tab, type the segment name.

   Note: If a segment occurs more than once in a map 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 map.

3. Type a description for the segment.
4. Click the **Tag** tab.
5. Enter the field identifier and segment identifier.
6. To use a key field, select the **Key Field** tab and complete the appropriate fields.
7. If the segment is a looping structure, select the **Looping** tab. If it is not a looping structure, accept the defaults and click **OK**.
8. Type the minimum amount of times the segment must repeat.

   Note: If the Min Usage box contains a 0, the segment is conditional. If the Min Usage box contains a 1 or greater, the segment is mandatory.

9. If required, enter the maximum number of times the segment can repeat.
10. Click **OK** to save changes to the segment.

How to Create a Positional Field

There are two ways to add positional fields to a map.

- If you have only one field to add, use the Create Sub function. See Creating Positional Fields using the Create Sub Function for instructions.
- If you need to add multiple positional fields to a record, use the Positional Field Editor. Create the fields for the first record, and then proceed with each sequential record. See Creating Positional Fields using the Positional Field Editor for instructions.

Creating Positional Fields using the Create Sub Function
About this task

Use this procedure to create a positional field in the NCPDP side of a map.

Procedure

1. Select the positional segment in which you intend to create a field.

   The system displays the NCPDP Positional Field Properties Dialog Box.

2. On the Name tab, type the name of the positional field.

   Note: Do not use spaces or dashes in the Name box. You can use the underscore symbol (_) to separate words.
3. To specify validation information for this field, click the **Validation** tab and enter the information.
4. To specify an extended rule for this map component, click the **Extended Rule** tab and enter the rule.
5. To specify a standard operation rule for this map component, click the **Standard Rule** tab and enter the rule.
6. To set conditional relationships between this field and another positional field, click the **Conditions** tab and set the conditions.
7. Click **OK** to save the properties for this field.

Creating Positional Fields using the Positional Field Editor
About this task

Use this procedure to create positional fields for a record.

Procedure
1. Right-click the positional segment and select **Edit Fields**.

   The system displays the Positional Field Editor dialog box.
2. If this is the first field in the record, click **New**. Otherwise, highlight the field that precedes the field you are creating in the record layout and click **New**.

   Note: You need to fill in the field values in the Field Details section.
3. Type the field name.

   Note:
   - Each application field must have a unique name. It is useful to tag the end of the fields that occur in multiple records with a suffix that identifies the record that contains it.
   - Do not use spaces or dashes (-) in the field name. You can use the underscore (_) to separate words.
4. If required, select **Mandatory**.
5. Type a description of the field.
6. Select the data type for field.
7. Select the field format.

   Note: The choices for this field depend on the type of field you selected from the Data Type list. If you choose Number or Date/Time in the Data Type box, you can select the data format from the Format list. If you selected String from the Data Type box, you should type a syntax token to indicate that this field must be formatted as the specified syntax token dictates. (The default syntax token is X.)

   See Field Format Values for more information on selecting your data format.
8. To indicate the exact position of the field in the record, type the starting position of the field.

   Note: You want to specify field start positions if, for example, you are using only a few fields but you want them positioned exactly in the record. The

alternative to specifying the start position of each field is to add the fields sequentially in the record and then use the Auto Position function.

9. Type the minimum number of characters that is acceptable for this field.

10. Type the maximum length of the field.

11. Click **New**.

The system adds the field and creates a new field with blank values ready for you to identify.

12. Create the rest of the fields according to your record layout.

Note: Click **Delete** to stop adding fields.

13. After adding the last field, if you want the system to automatically position the fields in the record, click **Auto Position**.

This option automatically calculates the start position in the record of each field. The system bases the start positions on the assumption that each field is positioned directly after the previous field and is of the length specified in the Max Length box. Click **Yes** to acknowledge the warning message that fields are sequenced in order.

Important: Use the Auto Position function only if you define a record tag, and if you define every field in the record in the sequence that each field occurs. See the *IBM Sterling Gentran:Server for Microsoft Windows Application Integration User Guide* for more information on defining record tags.

14. When you are finished adding fields to the record, click **Close**.

Repeat this procedure to add fields to the other records you defined.

Creating a Delimited Field

Each NCPDP delimited segment contains a group of logically-related data fields, separated by the field delimiter character. This topic explains how to create a delimited field.

About this task

Use this procedure to create a delimited field.

Procedure

1. Right-click the map object that precedes the delimited field you are creating and select either **Create Sub > Delimited Field** or **Insert > Delimited Field**.

The system displays the NCPDP Delimited Field Properties Dialog Box.

2. On the Name tab, type the name and a description for the field.

3. On the **Tag** tab, do the following:
   - Type the field identifier in the Field ID box.
   - To designate that the order of this field is fixed, select **Fixed Order**.

4. On the **Validation** tab, do the following:
   - If the is field mandatory, select **Check here if this field is mandatory**.
   - Specify the minimum and maximum length of the element.

   Note: If the data is less than the minimum length, the system generates a compliance error during translation.
   - Select the data type for the field.
   - Select the data format for the field.

Note: The choices for this field depend on the value you selected from the Data Type list. If you choose Number or Date/Time in the Data Type box, you can select the data format from the Format list. If you selected String from the Data Type box, you should type a syntax token to denote that this field must be formatted as the specified syntax token dictates. The default syntax token is X. See Field Format Values for more information about data formats.

5. To specify an extended rule for this field, click the **Extended Rule** tab and type the extended rule.

6. To specify a standard operation rule for this field, click the **Standard Rule** tab and type the standard rule.

7. To set conditional relationships between this field and another field, click the **Conditions** tab and do the following:

   - Select the conditional relationship.
   - If the type of relationship is Conditional or List Conditional, select the first field in the relationship from the Please select the condition field list.
   - Select the fields that you want to use in the relationship from the Available Fields list and click **Add** to add them to the Fields used in relationship list.

8. Click **OK** to save the changes.

About Repeating Fields

Repeating fields within a segment occur as logical groups and must be submitted as a set. Only fields that are designated as repeating fields (looping fields) in the NCPDP Telecommunication Standard can be repeated.
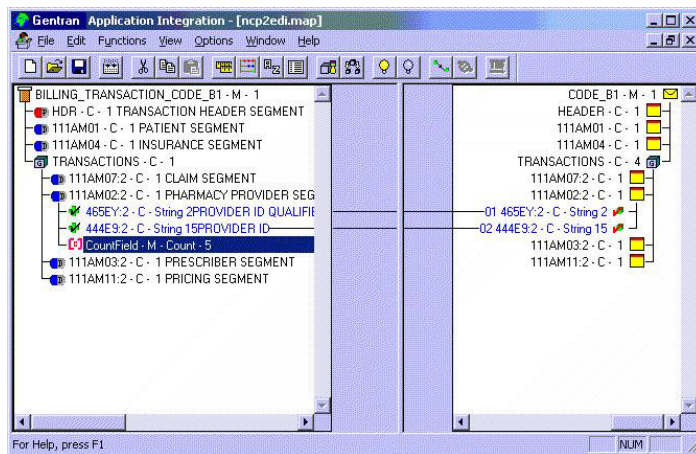
Count and counter fields identify repeating fields.

- A count field is used to specify the total number of repetitions of the fields in a grouping. All repeating fields must have a count field that accompanies the repeating field in the transaction.

- A counter field identifies a specific repeating loop in a series of loops, in sequential order. It is synonymous with occurrence number. Counter fields may occur multiple times with their associated repeating fields.

  For example: In a repetition of four, the first occurrence of the field or set/logical grouping is preceded by a counter field with a value of 1. The second occurrence of that field or grouping is preceded by a counter with a value of 2.
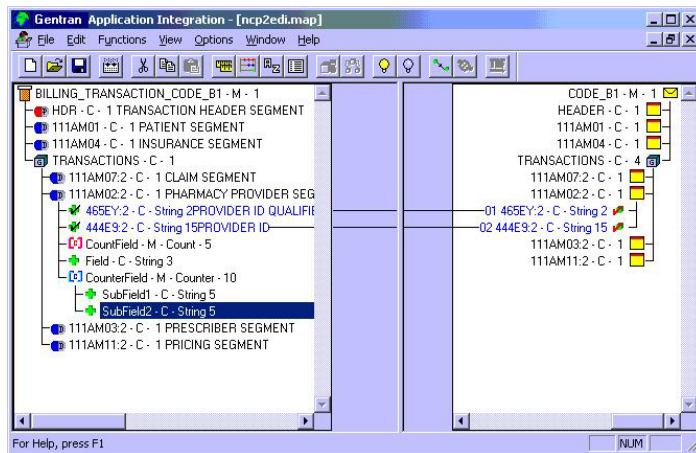
Example count field in map

This example shows a count field in an NCPDP map.

Example counter field in map

This example shows a counter field in an NCPDP map. This counter field has two subfields. The second subfield is selected.

Creating a Count Field

Count and counter fields are repeating fields. A count field is used to specify the total number of repetitions that follow the fields in a grouping.

About this task

Use this procedure to create a count field.

Procedure

1. Right-click the map object that precedes the delimited field you are creating and select either **Create Sub > Count Field** or **Insert > Count Field**.

   The system displays the NCPDP Count Field Properties dialog box.

2. O the Name tab, type the name of the field.

3. Type the description for the field and click **OK**.

4. On the **Tag** tab, do the following:
   a. Type the field identifier.
   b. To specify that the order of this field is fixed, select **Fixed Order**.

      Note: The NCPDP standard requires count fields to be in a fixed order.
   c. Click **OK**.
5. On the **Repeat** tab, do the following:
   a. Specify the minimum and maximum number of times that the field can repeat. The default value for Maximum Usage is 1.
   b. If this field is part of a loop, select **Treat this field as a repeating field**. This option enables you to link this field to a field that is at a different nesting level (one level up).

      Note:
      - Selecting this checkbox reduces the nesting level of the segments within the group by one.
      - When you link fields on the input side of your map to fields on the output side, the Application Integration subsystem normally requires that you link a single-occurring field to a field that is at the same level of nesting. The "Treat this field as a repeating field" option allows you to link fields that are in different nesting levels. If you do not select this option, you must link this field to a field that is at the same nesting level.
6. Click **OK** to save the changes to the field.

Creating a Counter Field

Count and counter fields are repeating fields. A **counter field** identifies a specific loop in a series of loops, in sequential order. Counter fields occur multiple times with their associated repeating fields.

About this task

Use this procedure to create a counter field.

Procedure

1. Right-click the map object that precedes the delimited field you are creating and select either **Create Sub > Counter Field** or **Insert > Counter Field**.

   The system displays the NCPDP Counter Field Properties Dialog Box with the Name tab selected.
2. O the Name tab, type the name of the field.
3. Type the description for the field and click **OK**.
4. On the **Tag** tab, do the following:
   a. Type the field identifier.
   b. To specify that the order of this field is fixed, select **Fixed Order**.

      Note: The NCPDP standard requires count fields to be in a fixed order.
   c. Click **OK**.
5. On the **Repeat** tab, do the following:
   a. Specify the minimum and maximum number of times that the field can repeat. The default value for Maximum Usage is 1.

b. If this field is part of a loop, select **Treat this field as a repeating field**. This option enables you to link this field to a field that is at a different nesting level (one level up).

   Note:
   - Selecting this checkbox reduces the nesting level of the segments within the group by one.
   - When you link fields on the input side of your map to fields on the output side, the Application Integration subsystem normally requires that you link a single-occurring field to a field that is at the same level of nesting. The "Treat this field as a repeating field" option allows you to link fields that are in different nesting levels. If you do not select this option, you must link this field to a field that is at the same nesting level.

6. Click **OK** to save the changes to the field.

Chapter 5. Using Partner Editor with NCPDP

About Partner Editor

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

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

See the Trading Partners section in the *IBM Sterling Gentran:Server for Microsoft Windows User Guide* for more information on using Partner Editor outside the scope of the NCPDP standard.

A partner profile begins with a partner definition. The partner definition contains the basic information that the system needs before you define the rest of the partner profile. You need to create a partner definition for each partner with whom you are going to exchange data.

To complete the partner profile, you need to define inbound and outbound relationships for each partner with whom you are going to exchange data.

Process for defining a partner profile

The following table describes the partner profile creation process.

Stage	Description
1	Create the partner definition. See Creating a NCPDP Partner Definition .
2	Create the inbound relationship. See About NCPDP Inbound Relationships .
3	Create the outbound relationship. See About NCPDP Outbound Relationships .
4	To use a cross-reference or lookup table with the partner relationship to supplement or convert data you enter or receive inbound, see the Creating Tables section in the *IBM Sterling Gentran:Server for Microsoft Windows User Guide* for more information.
5	To use locations to contain address- and contact-related information about the partner, see the Creating Partner Locations section in the *IBM Sterling Gentran:Server for Microsoft Windows User Guide* for more information.

Partner Editor Browser

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

This diagram illustrates the Partner Editor browser.

This table describes the parts of the Partner Editor browser.

Part	Function
Select a Partner	Displays the list of partner profiles.
Copy	Displays the Partner Copy dialog box, which allows you to copy a partner profile.
Import	Displays the Import File Select dialog box, which allows you to import a partner profile.
Export	Displays the Export File Build dialog box, which allows you to export a partner profile.
Exit	Exits the Partner Editor dialog box.
Edit	Displays the Partner Definition (New/Edit) Dialog Box for the selected partner.
New	Displays the Partner Definition (New/Edit) Dialog Box, which allows you to create a new partner definition.
Delete	Removes the selected partner profile from the system.
Inbound	Displays the Inbound Relationship Dialog Box for the selected partner.
Outbound	Displays the Outbound Relationship Dialog Box for the selected partner.
Tables	Displays the Partner Tables dialog box for the selected partner.
Locations	Displays the Location Select dialog box for the selected partner.

Partner Definition (New/Edit) Dialog Box

The Partner Definition dialog box enables you to create a new partner definition and allows you to edit a previously defined partner definition.

This diagram illustrates the Partner Definition - New dialog box.

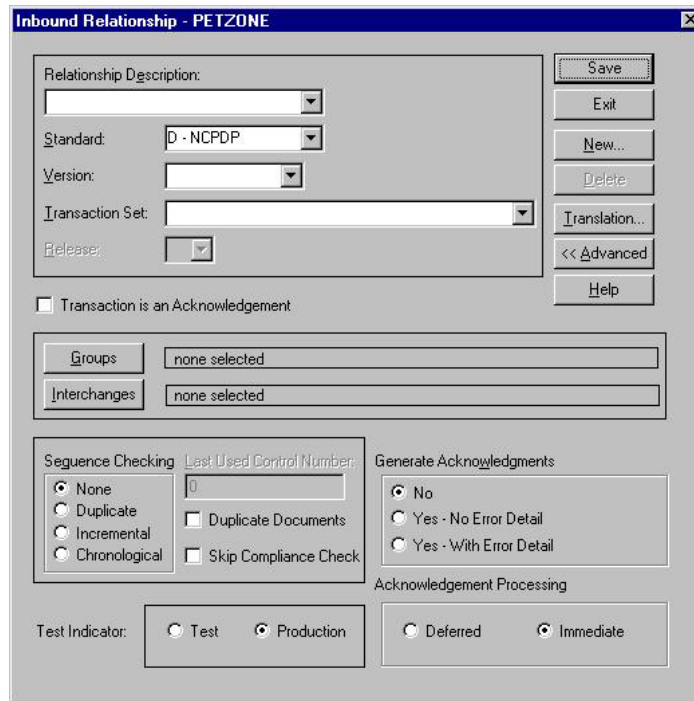This table describes the parts of the Partner Definition dialog box.

Part	Function
Profile ID	Specifies a unique identifier for the selected partner.
Name	Specifies a unique name for the partner. **Note:** Make this name as descriptive as possible because this is the name displayed in the partner selection list.
EDI Code	Specifies the EDI identifier for this partner. The system uses this value during inbound processing to select the correct trading partner definition.
Application Code	Specifies an application code used to identify this partner. The system uses this value during outbound import processing to select the correct trading partner definition.
Default Mailbox	Specifies a default mailbox to use in identifying this partner for EDI relationships.
Default E-mail Address	Specifies a default e-mail address to use to identify this partner for EDI relationships.
New Mailbox	Displays the Create New Mailbox wizard, which allows you to create a new mailbox.
Edit Mailbox	Displays the Mailbox Properties dialog box, which allows you to edit the mailbox.

Inbound Relationship Dialog Box

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

You are required to specify exactly which message is to be received. You also define which translation objects are used to define any turnaround messages, export rules, or printing requirements.

This diagram illustrates the Inbound Relationship dialog box with the Advanced options appended.

This table describes the parts of the Inbound Relationship dialog box.

Part	Function
Relationship Description	Specifies the existing inbound relationships.
Standard	Specifies the standard to be used in this relationship. **Note:** Only standards for which you have existing translation objects are displayed. This box cannot be changed for an existing relationship. Selection of this box is mandatory. Valid values: • A - TRADACOMS • B - OTHER • C - CII • D - NCPDP • E - EDIFACT • M - OTHER • O - ODETTE • R - ROSETTANET • T - TDCC • U - UCS • V - VDA
Version	Specifies the standard version to be used in this relationship. **Note:** Only versions of the selected standard for which you have existing translation objects are displayed. If this box is changed for an existing relationship, all of the information defined below it is cleared and must be reselected. Selection of this box is mandatory.

Part	Function
Transaction Set	Specifies the message to be used in this relationship. **Note:** Only messages for the selected version (for which you have existing translation objects) are displayed. If this box is changed for an existing relationship, all of the information defined below it is cleared and must be reselected. Selection of this box is mandatory.
Release	Specifies the release number to be used in this relationship. **Note:** Only releases for the selected message for which you have existing translation objects are displayed. This box is currently only used for messages defined in the TRADACOMS standard. Selection of this box is mandatory for all TRADACOMS messages.
Transaction is an Acknowledgement	Specifies that the transaction defined in this partner relationship is an acknowledgement. **Note:** If this checkbox is selected, the transaction is automatically exported and reconciliation is performed using the exported data.
Groups	Accesses the Inbound Group Select Dialog Box to configure the group-level relationship information.
Interchanges	Accesses the Inbound Interchange Select Dialog Box to configure the interchange-level relationship information.
New	Accesses the New Inbound Relationship dialog box, which allows you to create a new relationship.
Delete	Removes the specified inbound relationship from the system.
Translation	Accesses the Inbound Translation Object Dialog Box.
Advanced	Toggles the display of the advanced options.
Sequence Checking	Specifies whether the system will use sequence checking and whether that sequence checking is incremental or chronological. You can also indicate that the system must check for duplicate control numbers. • None - sequence checking will not be used • Duplicate - check for duplicate control numbers **Note:** Duplicate documents are not processed but outbound receipts are still generated and sent. • Incremental - the control number must be one greater than the last number • Chronological - the control number must be greater than the last number
Last Used Control Number	Specifies a value that is used to sequence check the next transaction set control number or message reference. This value is replaced with the sequence number of the last message received. This box is initially set to zero. **Note:** This box is inactive if Sequence Checking is NONE.
Duplicate Documents	Indicates whether the system will check for duplicate message names.
Skip Compliance Check	Indicates whether you want the system to compliance check the messages for this relationship.

Part	Function
Generate Acknowledgements	Instructs the system to generate a functional acknowledgement to this trading partner when you receive the message defined in this relationship. The default value for this box is No (do not generate an acknowledgement). • No - Do not generate acknowledgements • Yes - No Error Detail: Generate acknowledgements without error detail • Yes - With Error Detail: Generate acknowledgements with error detail **Note:** This entire box is inactive if the message in this relationship is an acknowledgement.
Test Indicator	Specifies whether you want the system to treat the messages that you receive from this trading partner as test or production.
Acknowledgement Processing	Indicates whether acknowledgement reconciliation will occur during the inbound break session (Immediate) or during its scheduled interval (Deferred). The default is Deferred.

Inbound Translation Object Dialog Box

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

This table describes the inbound translation levels (hierarchically, from the lowest level up).

Part	Function
Document	Validate the message against the specified translation object to verify if the message is compliant with the standard, and translate from the message format to print or application format.
Transaction	Remove the enveloping around a single message.
Group	Remove the enveloping around a set of related messages (the messages do not have to be the same type).
Interchange	Remove the enveloping around groups that are destined for the same trading partner.

This diagram illustrates the Inbound Translation Object dialog box with the Advanced options appended.

Inbound Translation Objects - PETZONE

Select Translation Objects

Turn Around ▼ ☐ Auto

Export File ▼ ☐ Auto

Print ▼

Save
Exit
<< Advanced
Help

Export File Name

Export to Mailbox

☑ Export to Mailbox
☐ Use Partner Default Mailbox and E-mail Address

Recipient Mailbox ▼ New Mailbox

Recipient E-mail Address Edit Mailbox

Content Type/SubType

Application ID:

Application Alias Value:

Additional Translation Objects

Import ▼

Data Entry ▼

Transaction ▼

Acknowledge ▼

This table describes the parts of the Inbound Translation Object dialog box.

Part	Function
Turn Around/Auto	Displays all of the turnaround message options. When a message is received, the turnaround message created is the natural response message that contains as many elements from the received message as possible. **Note:** Click the Auto check box if you want the defined turnaround process to be automatic. If the Auto box is deselected, the received message will remain in the In Documents until it is selected for processing.
Export File/Auto	Displays all registered Export translation objects relative to the Standard, Version, Transaction Set and Release defined by this relationship. This allows you to specify that when a message is received, it is exported into an output file. • – Click the Auto check box if you want the export file created automatically upon receipt of the message. If the Auto box is deselected, the received message will remain in the In Documents until it is selected for processing. – If the Export File Name is defined for this relationship, each message is exported individually to a unique file. If you use formatting characters in the file name, the message key changes for each message that is exported, the Process ID stays the same (for all messages exported from the same interchange), and the unique ID changes. See Export File Name for more information on these values.

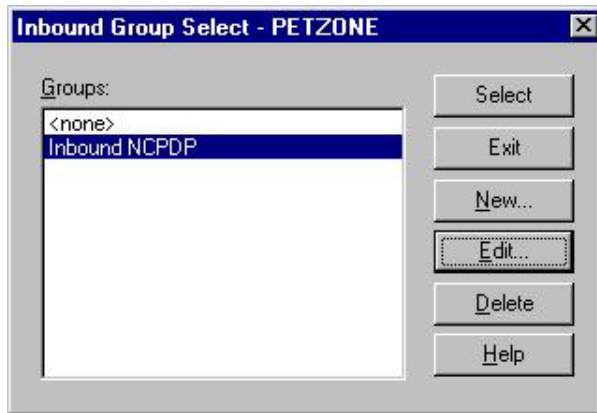| Part	Function
Print	Displays all of the print translation objects registered with the system for the Standard, Version, Transaction Set, and Release defined by the relationship. The selected translation object is used to print messages received from this partner.
Export File Name	Specifies the name of the file to be created or appended to as a result of performing an export operation. This file name can contain a mix of regular characters and formatting characters that are replaced by the translator with the runtime value they represent. Formatting characters supported: %y (two-digit year) %Y (four-digit year) %m (abbreviated month name) %M (month as a decimal number) %d (abbreviated weekday name) %D (day of the month as a decimal number) %H (hour in 24-hour format) %N (minutes) %S (seconds) %K (message key) %P (process identifier) %U (unique number derived using the current time, export filename, process identifier, and the rand() function) **Note:** The runtime file name is generated once per export. This is an example of a runtime file name using formatting characters: `d:\GENSRVNT\exports\dockey%Kprocid%Puniqueid%U.dat`
Advanced	Toggles the display of the advanced options.
Export to Mailbox	Checking this box invokes the "Export to Mailbox" function, which allows the output of an inbound translation to be delivered back to the Mailbox Server Manager. This allows the Mailbox Server Manager to act as a message broker to be responsible for delivering the data to its final destination. **Note:** If you specified the Export File Name, it is still valid and will become the Attachment Filename. Formatting characters are still valid for the filename and could cause multiple attachments to be created if document key is used. For example, if the following filename is used d:\gensrvnt\exports\dockey%Kprocid%Puniqueid%U.dat, this causes a new attachment to be created for each document since the document key creates a unique name for each document processed.
Use Partner Default Mailbox and E-Mail Address	Checking this box specifies that the output of the inbound translation is exported to the default mailbox and E-mail address configured for this partner.
Recipient Mailbox	Contains a list of mailboxes so you can select the mailbox to which the output of an inbound translation will be delivered.

Part	Function
New Mailbox	Displays the Create New Mailbox wizard, which allows you to create a new mailbox.
Recipient E-mail Address	Contains the E-mail address to which the output of an inbound translation will be delivered.
Edit Mailbox	Displays the Create New Mailbox wizard, which allows you to edit the mailbox.
Content Type/SubType	Contains the content type/sub type of the message containing the output of the inbound translation.
Application ID	Specifies the application identifier that indicates the destination of the messages. **Note:** This value is not used for inbound.
Application Alias Value	Contains (typically) the transaction set ID from the relationship. **Note:** This value is used during the break process to identify a relationship, but it is only used if the 5-key lookup fails (sender ID, agency, version, test/production flag, and transaction set ID).
Import	Not used for NCPDP.
Data Entry	Not used for NCPDP.
Transaction	Not used for NCPDP.
Acknowledge	Contains other translation objects associated with the relationship, giving you the capability to change the system behavior at the message translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. **Note:** You will select a translation object from the Acknowledge list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner relationship. When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list. If the message is an acknowledgement and you choose an additional Acknowledge translation object, the system will use the additional translation object in place of the export translation object for acknowledgement reconciliation.

Inbound Group Select Dialog Box

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

Note: Functional groups are optional for NCPDP.

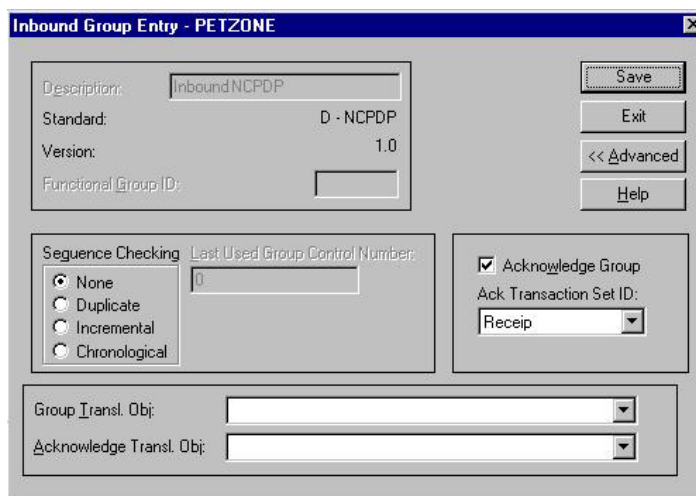This diagram illustrates the Inbound Group Select dialog box.

This table describes the parts of the Inbound Group Select dialog box.

Part	Function
Groups	Displays all of the functional group definitions that are established for this trading partner.
Select	Selects the indicated functional group to be used with this relationship. **Note:** Select <none> if the standard you are using does not require groups and you do not want to use one.
New	Displays the Inbound Group Entry Dialog Box, which allows you to create a new group.
Edit	Displays the Inbound Group Entry Dialog Box, which allows you to edit the selected group.
Delete	Removes the selected group from the system.

Inbound Group Entry Dialog Box

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

This diagram illustrates the Inbound Group Entry dialog box with the Advanced options appended.

This table lists the describes of the Inbound Group Entry dialog box.

Part	Function
Description	Contains the name of the functional group description.
Standard	Displays the standard the system is using for this relationship definition.
Version	Displays the version of the standard the system is using for this relationship.
Functional Group ID	Defines the identification of the functional group specified. These identification boxes are defined by the appropriate standard group to categorize messages. The standard defines which functional group ID should be used with each message type. This is a mandatory box.
Advanced	Toggles the display of the advanced options.
Sequence Checking	Specifies whether inbound sequence checking is used and whether the type of sequence checking is incremental or chronological. You can also indicate that the system must check for duplicate control numbers. • None - sequence checking will not be used • Duplicate - check for duplicate control numbers • Incremental - the control number must be one greater than the last number • Chronological - the control number must be greater than the last number **Note:** If the system detects duplicate control numbers or detects incremental or chronological control numbers that are out of sequence, those messages are stored in the ?In Documents.
Last Used Group Control Number	Specifies a value that the system will use to sequence check the group control number. The number is replaced by the group control number that the system receives. This value is initially set to zero.
Acknowledge Group	Instructs the system to send a functional acknowledgement to this trading partner when you receive the group defined in this relationship. The default value for this box is deselected (do not expect an acknowledgement). **Note:** This check box is inactive if the message is an acknowledgement.
Ack Translation Set ID	Contains the acknowledgement that you want generated for this group.
Group Transl. Obj.	Not used for NCPDP.
Acknowledge Transl. Obj.	Not used for NCPDP.

Inbound Interchange Select Dialog Box

The Inbound Interchange Select dialog box is used to select an existing interchange definition to be associated with this relationship. You can also use it to initiate the definition of a new interchange or to modify or delete an existing definition. The interchanges available to you are determined by the version you selected on the Inbound Relationships dialog. Interchanges are optional for NCPDP.

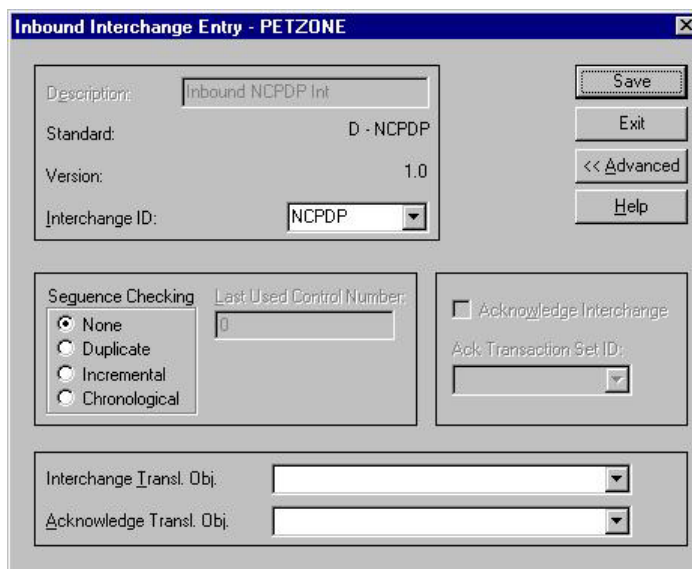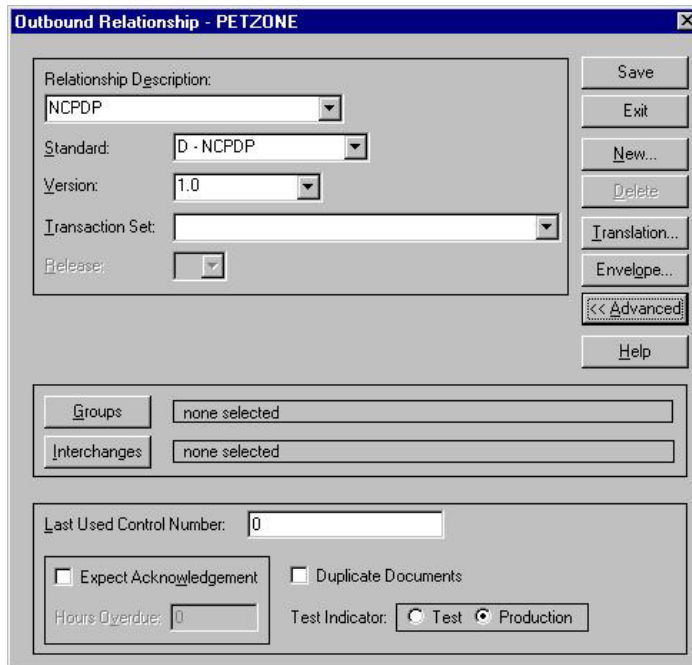This diagram illustrates the Inbound Interchange Select dialog box.

This table describes the parts of the Inbound Interchange Select dialog box.

Part	Function
Interchanges	Displays all of the Interchange definitions that have been established for this trading partner.
Select	Selects the indicated interchange to be used with this relationship. **Note:** Select <none> if the standard you are using does not require interchanges and you do not want to use one.
New	Displays the Inbound Interchange Entry Dialog Box, which allows you to create a new interchange.
Edit	Displays the Inbound Interchange Entry Dialog Box, which allows you to edit the selected interchange.
Delete	Removes the selected interchange from the system.

Inbound Interchange Entry Dialog Box

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

This diagram illustrates the Inbound Interchange Entry dialog box with the Advanced options appended.

This table describes the parts of the Inbound Interchange Entry dialog box.

Part	Function
Description	Contains the name of the interchange description.
Standard	Displays the standard the system is using for this relationship definition.
Version	Displays the version of the standard the system is using for this relationship.
Interchange ID	Defines the type of interchange you specified. The standard defines which interchange ID should be used with each standard. This is a mandatory box.
Advanced	Toggles the display of the advanced options.
Sequence Checking	Specifies whether or not the system will use sequence checking and whether the sequence checking is incremental or chronological. You can also indicate that the system must check for duplicate control numbers. • None - sequence checking will not be used • Duplicate - check for duplicate control numbers • Incremental - the control number must be one greater than the last number • Chronological - the control number must be greater than the last number **Note:** If the system detects duplicate control numbers or detects incremental or chronological control numbers that are out of sequence, those messages are stored in the ?In Documents.
Last Used Control Number	Specifies a value that is used to sequence check the next interchange control number. The number is replaced by the control number on the last interchange received. This box is initially set to zero. **Note:** This box is inactive if Sequence Checking is NONE.
Acknowledge Interchange	Instructs the system to send a functional acknowledgement to this trading partner when you receive the interchange set defined in this relationship. The default value for this box is deselected (do not expect an acknowledgement).
Ack Translation Set ID	Specifies the acknowledgement that you want the system to generate for this interchange.
Interchange Transl. Obj.	Not used for NCPDP.
Acknowledge Transl. Obj.	Not used for NCPDP.

Outbound Relationship Dialog Box

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

You are required to specify exactly which message the system sends. You must also specify which translation objects are used to define the data entry formatting, import rules, or printing requirements. In addition, for NCPDP you need to define the specific enveloping requirements that you agreed on with your trading partner.

This diagram illustrates the Outbound Relationship dialog box with the Advanced options appended.

This table describes the parts of the Outbound Relationship dialog box.

Part	Function
Relationship Description	Indicates the relationship description.
Standard	Specifies the standard to be used in this relationship. **Note:** Only standards for which you have existing translation objects are displayed. This box cannot be changed for an existing relationship. Selection of this box is mandatory. Valid values: • A - TRADACOMS • B - OTHER • C - CII • D - NCPDP • E - EDIFACT • M - OTHER • O - ODETTE • R - ROSETTANET • T - TDCC • U - UCS • V - VDA
Version	Specifies the standard version to be used in this relationship. **Note:** Only versions of the selected standard for which you have existing translation objects are displayed. If this box is changed for an existing relationship, all of the information defined below it is cleared and must be reselected. Selection of this box is mandatory.

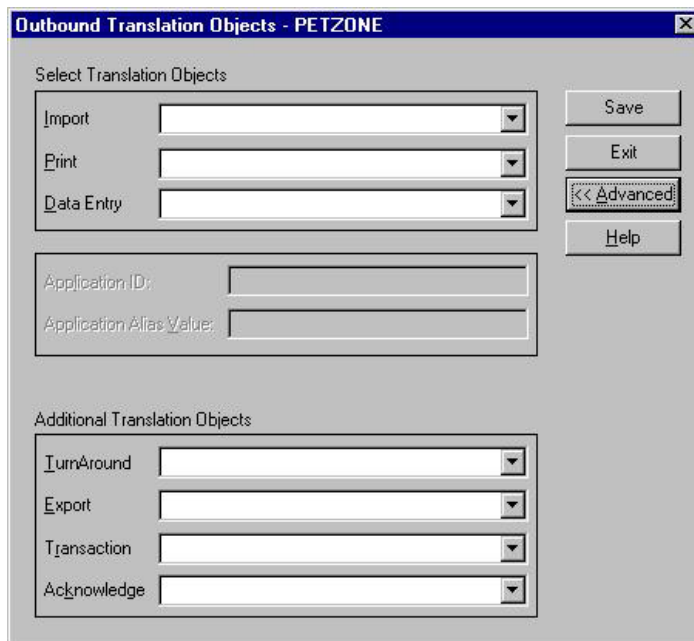| Part	Function
Transaction Set	Specifies the message to be used in this relationship. **Note:** Only transaction sets for the selected version (for which you have existing translation objects) are displayed. If this box is changed for an existing relationship, all of the information defined below it is cleared and must be reselected. Selection of this box is mandatory.
Release	Specifies the release number to be used in this relationship. **Note:** Only releases for the selected message for which you have existing translation objects are displayed. This box is currently only used for messages defined in the TRADACOMS standard. Selection of this box is mandatory for all TRADACOMS messages.
Groups	Accesses the Outbound Group Select Dialog Box.
Interchanges	Accesses the Outbound Interchange Select Dialog Box.
New	Accesses the New Outbound Relationship dialog box, which allows you to create a new relationship.
Delete	Removes the specified outbound relationship from the system.
Translation	Accesses the Outbound Translation Object Dialog Box.
Envelope	Accesses one of the Outbound Envelope dialog boxes below, depending on which version you specified. • Outbound UNH Envelope • Outbound MHD Envelope • Outbound ST Envelope • Outbound Generic Envelope
Advanced	Toggles the display of the advanced options.
Last Used Control Number	Specifies a value that is used to generate the next transaction set control number or message reference. The number that is generated will always be one more than the number in this box. Initially, this box is set to zero.
Expect Acknowledgement	Instructs the system to expect a functional acknowledgement to be received from this trading partner as a result of your partner receiving the message defined in this relationship. The default value for this box is deselected (do not expect an acknowledgement).
Hours Overdue	Defines how many hours must elapse before an expected functional acknowledgement is considered overdue. This box is only valid if the Expect Acknowledgement box is selected. The default value for this box is "48," indicating that the acknowledgement is considered overdue in two days. If you enter a value of zero in this box, the acknowledgement is immediately considered overdue. **Note:** This box is inactive if Expect Acknowledgement is deselected.
Duplicate Documents	Instructs the system to check for duplicate message names. **Note:** This function checks for duplicate messages when messages are imported manually into the Workspace. Duplicate messages remain in the Workspace until they are deleted. If you try to move or post a duplicate message, a warning message is displayed.
Test Indicator	Defines whether this relationship definition is in test or production status. The default value is production.

Outbound Translation Object Dialog Box

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

This table describes the outbound translation levels (hierarchically, starting with the lowest level).

Part	Function
Document	Translate from import format or data entry to EDI.
Transaction	Build the enveloping around a single message.
Group	Build the enveloping around a set of related messages (the messages do not have to be the same type).
Interchange	Build the enveloping around groups that are destined for the same trading partner.

This diagram illustrates the Outbound Translation Object dialog box with the Advanced options appended.

This table describes the parts of the Outbound Translation Object dialog box.

Part	Function
Import	Displays all of the import translation objects that are in the system for the Standard, Version, Transaction Set, and Release defined by the relationship.
Print	Displays all of the print translation objects that are in the system for the Standard, Version, Transaction Set, and Release defined by the relationship. The selected translation object is used to print messages sent to this partner.
Data Entry	Displays all of the screen entry translation objects that are in the system for the Standard, Version, Transaction Set, and Release defined by the relationship.
Advanced	Toggles the display of the advanced options.
Application ID	Defines the application identifier that indicates the destination of the messages. **Note:** This value is used only if the system import process uses a 3-key lookup.

Part	Function
Application Alias Value	Defines criteria for this relationship definition, which is used instead of another relationship definition, during the application import function. **Note:** • This box will only be used if you receive translation objects that are defined to use the Application Alias Value. • This value is used only if the system import process uses a 3-key lookup.
TurnAround	Not used for NCPDP.
Export	Not used for NCPDP.
Transaction	Contains other translation objects associated with the relationship, which gives you the capability to change the system behavior at the message translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. You select a translation object from the Transaction list if you have created a specific Transaction Build translation object for this relationship and if you want to change the way the system behaves for this partner relationship.
Acknowledge	Not used for NCPDP.

Outbound Group Select Dialog Box

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

Note: Functional groups are not specified for NCPDP.

This diagram illustrates the Outbound Group Select dialog box.
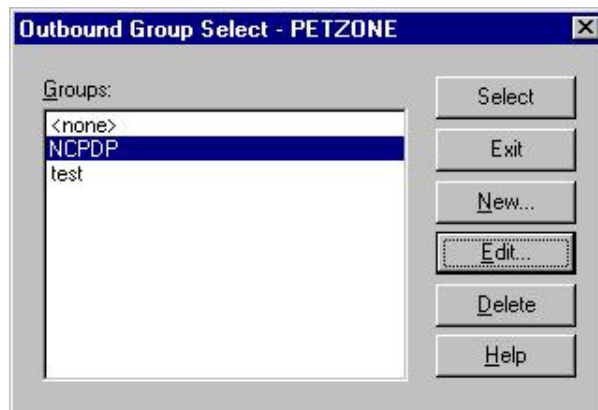
This table describes the parts of the Outbound Group Select dialog box.

Part	Function
Groups	Displays all of the functional group definitions that have been established for this trading partner.

Part	Function
Select	Selects the indicated functional group as the one the system uses for this relationship.
New	Displays the Outbound Group Entry Dialog Box, which allows you to create a new group.
Edit	Displays the Outbound Group Entry Dialog Box, which allows you to edit the selected group.
Delete	Removes the selected group from the system.

Outbound Group Entry Dialog Box

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

This diagram illustrates the Outbound Group Entry dialog box with the Advanced options appended.

This table describes the parts of the Outbound Group Entry dialog box.

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

Part	Function
Functional Group ID	Defines the identification of the functional group being specified. These identification boxes are defined by each appropriate standards group to group like messages. The standard defines which functional group ID should be used with each message type. This is a mandatory box.
Envelope	Accesses one of the Outbound Functional Group Envelope dialog boxes below, depending on which version you specified on the Outbound Relationship Dialog Box. • Outbound GS Functional Group • Outbound UNG Functional Group • Outbound BAT Functional Group **Note:** This button is inactive for NCPDP partner relationships.
Advanced	Toggles the display of the advanced options.
Last Used Group Control Number	Specifies a value that is used to generate the next interchange control number. The number that is generated will always be one more than the number in this box. This box will initially be set to zero. **Note:** To ensure that functional acknowledgements work correctly you must define a unique control number for each group relationship that exists for the same partner relationship.
Expect Acknowledgement	Instructs the system to expect a functional acknowledgement to be received from this trading partner as a result of your partner receiving the group defined in this relationship. The default value for this box is deselected (do not expect an acknowledgement).
Hours Overdue	Defines how many hours must elapse before an expected functional acknowledgement is considered overdue. This box is only valid if the Expect Acknowledgement box is selected. The default value for this box is "48," indicating that the acknowledgement is considered overdue in two days. If you enter a value of "0" (zero) in this box, the acknowledgement is immediately considered overdue. **Note:** This box is inactive if Expect Acknowledgement is deselected.
Sequence From Group	Indicates whether the transaction set control number options for this group setup should be controlled at the group level. If this box is deselected, then the following boxes are inactive .
Last Used Control Number	Specifies a value that is used to generate the next transaction set control number for the sets defined within this functional group. The number that is generated will always be one more than the number in this box. This box will initially be set to zero. **Note:** This box is inactive if Sequence From Group is deselected.

Part	Function
Format	Specifies the format of the transaction set control number that is generated. • Normal The number is generated by incrementing the last used control number. The length of the number is defined by the standard. • 6/3 The number is a composite of two numbers. The first six digits are the last six digits of the functional group control number. The last three digits are a counter beginning at "1" within the functional group. Use this format only as instructed by your trading partner. • 5/4 The number is a composite of two numbers. The first five digits are the last five digits of the functional group control number. The last four digits are a counter beginning at "1" within the functional group. This is the normal TDCC numbering convention. It is used by the Motor, Rail, and Ocean transportation industries. • 5/3 The number is a composite of two numbers. The first five digits are the last five digits of the functional group control number. The last three digits are a counter beginning at "1" within the functional group. This is the normal UCS convention, which is used by the Grocery and Warehousing industries. **Note:** This box is inactive if Sequence From Group is deselected.
Group Transl. Obj.	Contains a partner-specific Group Build Map translation object if this trading partner group deviates from the normal system behavior. You will select a translation object from this list if you want the system to perform partner-specific grouping. **Important:** We strongly recommend that you do not change the translation objects in the Group Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.
Acknowledge Transl. Obj.	Not used for NCPDP.

Outbound Interchange Select Dialog Box

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

Note: All outbound document relationships that are configured to use the same interchange definition will be placed into the same interchange during the build process.

This diagram illustrates the Outbound Interchange Select dialog box.

This table describes the parts of the Outbound Interchange Select dialog box.

Part	Function
Interchanges	Displays all of the interchange definitions that have been established for this trading partner.
Select	Selects the indicated interchange to be used with this relationship. **Note:** Select <none> if the standard you are using does not require interchanges and you do not want to use one.
New	Displays the Outbound Interchange Entry Dialog Box, which allows you to create a new interchange.
Edit	Displays the Outbound Interchange Entry Dialog Box, which allows you to edit the selected interchange.
Delete	Removes the selected interchange from the system.

Outbound Interchange Entry Dialog Box

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

This diagram illustrates the Outbound Interchange Entry dialog box with the Advanced options appended.

This table describes the parts of the Outbound Interchange Entry dialog box.

Part	Function
Description	Contains the name of the interchange description.
Standard	Displays the standard the system is using for this relationship definition.
Version	Displays the version of the standard the system is using for this relationship.
Interchange ID	Defines the type of interchange you specified. The standard defines which interchange ID should be used with each standard. This is a mandatory box.
Advanced	Toggles the display of the advanced options.

Part	Function
Envelope	Accesses one of the Outbound Interchange Envelope dialog boxes below, depending on which version you specified on the Outbound Relationship Dialog Box. • Outbound ISA Envelope • Outbound ICS Envelope • Outbound BG Envelope • Outbound UNB Envelope • Outbound UNA Envelope • Outbound STX Envelope • Outbound VDA Envelope • Outbound NCPDP Envelope
Use the default Mailbox and E-mail Address	Indicates that the system will use the default Mailbox and E-mail address specified on the Partner Definition (New/Edit) Dialog Box when sending this interchange.
Mailbox	Specifies a mailbox to use to identify this partner for NCPDP relationships.
E-mail Address	Specifies the destination mailbox for this interchange.
New Mailbox	Displays the Create New Mailbox wizard, which allows you to create a new mailbox.
Edit Mailbox	Displays the Mailbox Properties dialog box, which allows you to edit the mailbox.
Content Type	Defines the content type and subcontent type of the interchange.
Set Max Number of Documents per Interchange	Instructs the system to only allow the specified maximum number of messages per interchange for this relationship.
Max Number of Documents per Interchange	Specifies the maximum number of messages allowed per interchange for this relationship.
Last Used Control Number	Specifies a value that is used to generate the next interchange control number. The number that is generated is always one more than the number in this box. Initially, this box is set to zero.
Expect Acknowledgement	Instructs the system to expect a functional acknowledgement to be received from this trading partner as a result of your partner receiving the interchange set defined in this relationship. The default value for this box is deselected (do not expect an acknowledgement).
Hours Overdue	Defines how many hours must elapse before an expected functional acknowledgement is considered overdue. This box is only valid if the Expect Acknowledgement box is selected. The default value for this box is "48," indicating that the acknowledgement is considered overdue in two days. If you enter a value of zero in this box, the acknowledgement is immediately considered overdue. **Note:** This box is inactive if Expect Acknowledgement is deselected.
Interchange Transl. Obj.	Allows you to select a partner-specific Interchange Build Map translation object if this trading partner interchange deviates from the normal system behavior. You will select a translation object from this list if you want the system to perform partner-specific interchanging. **Important:** We strongly recommend that you do not change the translation objects in this list, unless you have a specific reason for doing so.
Acknowledge Transl. Obj.	Not used for NCPDP.

Outbound NCPDP Envelope Dialog Box

The Outbound NCPDP Envelope enables you to specify outbound parameters for the NCPDP standard. The translator uses this information during the build process to generate batch segments.

This diagram illustrates the Outbound Envelope NCPDP Envelope dialog box.
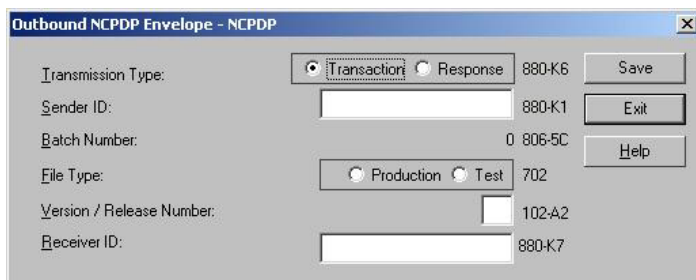
This table describes the parts of the Outbound NCPDP Envelope dialog box.

Part	Function
Transmission Type	Identifies whether the transmission is a Transaction or Response.
Sender ID	Specifies the sender identifier defined by the processor/switch.
Batch Number	Specifies the number of the batch, which matches the trailer record and is assigned by the sender.
File Type	Specifies whether the file is Production or Test.
Version/Release Number	Specifies the version/release number of the header data.
Receiver ID	Specifies the sender identifier defined by the processor.

Creating an NCPDP Partner Definition

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

Before you begin

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

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

About this task

Use this procedure to create a new partner definition.

Procedure

1. Select **Tools > Partner Editor**.

   The system displays the Partner Editor Dialog Box.
2. Click **New**.

   The system displays the Partner Definition dialog box.
3. Type a unique alphanumeric Profile ID for this partner.

   Note: You may not use special characters.
4. Type the partner name.
5. Type the EDI identifier for this partner.

   Note: The system uses this identifier during inbound processing, to select the correct partner. This correlates to the Sender ID in the Inbound Interchange.
6. If necessary, type an application code to identify this partner.

   Note: The system uses this identifier during outbound import processing, to select the correct partner.
7. Click **Save**.
8. Click **Exit** to return to the Partner Editor dialog box.

   Note: To complete the partner profile you need to define an inbound and outbound relationship for this partner.

About NCPDP Inbound Relationships

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

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

- The type of data which is received.
- The criteria the system uses to validate the information it receives.
- The functional groups and interchanges in which you expect to receive the messages.
- Which receipt acknowledgement translation object should be used.

Translation objects

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

Note: If this relationship requires a new translation object, you must register that translation object with the system before creating the inbound relationship. See the Registering Translation Objects section in the *Sterling Gentran:Server User Guide* for instructions on how to register translation objects.

Inbound groups and interchanges

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

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

Before you begin

Before setting up an inbound relationship, you must know the following information to plan the implementation of this partner:
* The standard that you expect from this trading partner (for example, NCPDP).
* The standard version that you expect from this trading partner (for example, 5.1 for NCPDP).
* The code for the message you expect from this trading partner (for example, Purchase Order Request).
* The type of functional group and interchange the message is wrapped in when it is received from this partner.

Process overview

The process you use when defining an inbound relationship is explained in the following table.

Stage	Description
1	Create a new inbound relationship.
2	Select at least one inbound translation object.
3	Create and select at least one inbound group to define how the message is received from this partner.
4	Create and select at least one inbound interchange to define how the message is received from this partner.
5	Set up the corresponding outbound relationship to generate the acknowledgements your partner requests.

Creating an Inbound Relationship
About this task

Use this procedure to create an inbound relationship.

Procedure
1. Select **Tools > Partner Editor**.

   The system displays the Partner Editor Dialog Box.
2. Select the partner profile for which you want to create an inbound relationship and click **Inbound**.

   Note: You must have already created a partner definition for this partner.

The system displays the Inbound Relationship Dialog Box.

3. Click **New**.

   The system displays the New Inbound Relationship dialog box.

4. In the description box, type a unique relationship name and click **Save**.

5. From the appropriate drop-down lists on the Inbound Relationship dialog box, select the following:

   - Standard (D - NCPDP)
   - Version
   - Transaction Set

   Note: The information required for this dialog box should be provided to you by your trading partner when this partner defines the details of the messages they send you.

6. To define parameters to comply with the processing needs of your partner (such as Sequence Checking, Last Used Control, Duplicate Documents, or Generate Acknowledgement), click **Advanced**.

   This extends the Inbound Relationship dialog box.

Selecting an Inbound Translation Object
About this task

Use this procedure to select an inbound interchange.

Procedure

1. On the Inbound Relationship dialog box, click **Translation**.

   The system displays the Inbound Translation Object Dialog Box.

2. From the drop-down lists, select the translation objects that are required for this inbound relationship from the lists.

   Note: The lists display all the translation objects that are registered in the system that are appropriate for the type of translation object (for example, Export or Print) and the message.

3. If there are no translation objects displayed in the drop-down lists, no translation objects of that type are registered for the correct version of the message defined in the relationship.

4. If you selected an Export File translation object and you want to export to a specific file, type the universal naming convention (UNC) name of that file in the Export File Name box.

5. Click **Save** to save your selections and return to the Inbound Relationship dialog box.

Selecting an Inbound Interchange
About this task

Use this procedure to select an inbound interchange.

Procedure

1. On the Inbound Relationship dialog box, click **Interchanges**.

   The system displays the Inbound Interchange Select Dialog Box.

2. If the required interchange is in the Interchanges list, select the interchange and click **Select**. Continue with the Finalizing the Inbound Relationship task.

   Otherwise, continue with step 3 to create the interchange.

3. On the Inbound Interchange Select dialog box, click **New**.

   The system displays the Inbound Interchange Entry Dialog Box.

4. In the Description box, type the interchange description.

5. In the Interchange ID box, type the identification of the interchange you are specifying.

   Note: Your standards group defines which interchange ID should be used for each type of message.

6. Click **Advanced** to display the full list of interchange setup options.

7. From the Acknowledge Transl.Obj. list, select the appropriate receipt acknowledgement map and click **Save**.

   The system stores the information and return to the Inbound Interchange Select dialog box.

8. Highlight the new interchange and click **Select**.

Finalizing the Inbound Relationship

About this task

Use this procedure to finalize the inbound relationship.

Procedure

1. On the Inbound Relationship dialog box, click **Save**.
2. Click **Exit** to return to the Partner Editor dialog box.

About NCPDP Outbound Relationships

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

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

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

Translation objects

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

Note: If this relationship requires a new translation object, you must register that translation object with the system before creating the outbound relationship. See

the Registering Translation Objects section in the *Sterling Gentran:Server User Guide* for instructions on how to register translation objects.

Outbound groups and interchanges

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

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

Before you begin

Before setting up an outbound relationship, you must know the following information to plan the implementation of this partner:

*   The standard that you expect from this trading partner (for example, NCPDP).
*   The standard version that you expect from this trading partner (for example, 5.1 for NCPDP).
*   The code for the message you expect from this trading partner (for example, Purchase Order Request).
*   The type of functional group and interchange the message is wrapped in when it is sent to this partner.

Process overview

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

Stage	Description
1	Create a new outbound relationship.
2	Select at least one outbound translation object.
3	Create and select at least one outbound interchange to define how the message is received from this partner.
4	If you are using the NCPDP standard, complete the Outbound NCPDP Envelope Dialog Box at the interchange level.
5	If you have not done so already, set up the corresponding inbound relationship to receive the acknowledgements you expect from your partner.

Creating an Outbound Relationship
About this task

Use this procedure to create an outbound relationship.

Procedure
1. Select **Tools > Partner Editor**.
    The system displays the Partner Editor Dialog Box.

2. Select the partner profile for which you want to create an outbound relationship and click **Outbound**.

   Note: You must have already created a partner definition for this partner.

   The system displays the Outbound Relationship Dialog Box.

3. Click **New**.

   The system displays the New Outbound Relationship dialog box.

4. In the description box, type a unique relationship name.

5. Click **Save**.

   The system creates a new outbound relationship and returns to the Outbound Relationship dialog box.

6. From the appropriate drop-down lists on the Outbound Relationship dialog box, select the following:
   - Standard (D - NCPDP)
   - Version
   - Transaction Set

   Note: The information required for this dialog box should be provided to you by your trading partner when this partner defines the details of the messages they send you.

7. If you need to define parameters to comply with the processing needs of your partner (for example, Last Used Control Number, Expect Acknowledgement, Hours Overdue, Duplicate Documents, or Test Indicator), click **Advanced**.

   This extends the Outbound Relationship dialog box.

Selecting an Outbound Translation Object
About this task

Use this procedure to create an outbound relationship.

Procedure

1. On the Outbound Relationship dialog box, click **Translation**.

   The system displays the Outbound Translation Object Dialog Box.

2. From the drop-down lists, select the translation objects that are required for this outbound relationship from the lists.

   Note: The lists display all the translation objects that are registered in the system that are appropriate for the type of translation object (for example, Import or Print) and the message. If there are no translation objects displayed in the drop-down lists, no translation objects of that type are registered for the correct version of the message defined in the relationship.

3. If you selected an Import translation object, you may need to define the following if your import process uses a 3-key lookup:
   - In the Application ID box, type the application identifier that indicates the destination for the messages.
   - In the Application Alias Value box, type criteria that the system will use to distinguish this relationship from others during the application import function.

4. Click **Save** to save your selections and return to the Outbound Relationship dialog box.

Selecting an Outbound Interchange
About this task

Use this procedure to create an outbound relationship.

Procedure

1. On the Outbound Relationship dialog box, click **Interchanges** to display a list of existing interchanges.

   The system displays the Outbound Interchange Select Dialog Box.

2. If the required interchange is in the Interchanges list, select the interchange and click **Select**. Continue with "Finalizing the Outbound Relationship."

   Otherwise, continue with step 3 to create the interchange.

3. On the Outbound Interchange Select dialog box, click **New**.

   The system displays the Outbound Interchange Entry Dialog Box.

4. In the Description box, type the interchange description.

5. In the Interchange ID box, type the identification of the interchange you are specifying.

   Your standards group defines which interchange ID should be used for each type of message.

6. Click **Advanced** to display the full list of interchange setup options.

   This extends the Outbound Interchange Entry dialog box.

7. To use the default mailbox and e-mail address, continue with step 9. Otherwise, either select the appropriate mailbox or click **New Mailbox** to create a new mailbox.

   See the *IBM Sterling Gentran:Server for Microsoft Windows Communications User Guide* for more information on creating mailboxes.

8. From the Interchange Transl. Obj. list, select the appropriate build translation object and click **Save**.

   The system stores the information and returns to the Outbound Interchange Entry dialog box.

9. Click **Envelope** to set up the parameters for the generation of the interchange segment.

   The system displays the Outbound NCPDP Envelope Dialog Box.

10. After you set up the required parameters in the enveloping dialog box, click **Save** to store the information and return to the Outbound Interchange Entry dialog box.

11. Click **Save** to store the information on the Outbound Interchange Entry dialog box and return to the Outbound Interchange Select dialog box.

12. Highlight the new interchange and click **Select** to return to the Outbound Relationship dialog box.

Finalizing the Outbound Relationship
About this task

Use this procedure to create an outbound relationship.

Procedure

1. On the Outbound Relationship dialog box, click **Save** to save the outbound relationship.

2. Click **Exit** to return to the Partner Editor dialog box.

Editing an NCPDP Partner Definition

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

About this task

Use this procedure to edit a partner profile.

Procedure

1. Select **Tools > Partner Editor**.

   The system displays the Partner Editor Dialog Box.
2. Select the appropriate partner from the Select a Partner list and click **Edit**.

   The system displays the Partner Definition (New/Edit) Dialog Box for that partner.
3. Make the necessary changes and click **Save**.

   Note: You can also edit other aspects of a partner relationship (such as inbound relationship, outbound relationship) by clicking the appropriate button (Inbound or Outbound) on the Partner Editor dialog box. You are not able to edit any boxes that are unavailable; these are the "keys" to the relationship. In this case, you must create a new inbound or outbound relationship for that partner.

Deleting a Partner Profile

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

About this task

Use this procedure to delete a partner profile.

Procedure

1. Select **Tools > Partner Editor**.

   The system displays the Partner Editor Dialog Box.
2. Select the appropriate partner and click **Delete**.

   You are prompted to confirm the deletion.

   Important: When you delete a partner relationship, the messages and interchanges associated with that partner are also deleted. If any messages or interchanges exist for a partner you choose to delete, you are warned before the actual deletion.
3. Click **Yes** to delete the selected partner profile.

   The partner profile and all associated records are deleted.

Chapter 6. Batch Transaction Set Schematics

Batch Transaction Header

Record

Format: fixed-length (non-delimited)

Length: 75 characters

Segment ID: 2-characters (00)

Field	Field Name	Type	Length	Key Field	Value
880-K4	Text Indicator	A/N	1		Start of text (STX) = X'02'
701	Segment Identifier	A/N	2		00
880-K6	Transmission Type	A/N	1		• T = Transaction • R = Response • E = Error
880-K1	Sender ID	A/N	24	Yes	Defined by processor or switch
806-5C	Batch Number	N	7		Number that the sender assigns. Matches Batch Number in Trailer. To be returned in Response or Error file from processor/switch
880-K2	Creation Date	N	8		Format = CCYYMMDD
880-K3	Creation Time	N	4		Format = HHMM
702	File Type	A/N	1		• P = Production • T = Test
102-A2	Version/Release Number	A/N	2		Version/release number of Header data
880-K7	Receiver ID	A/N	24	Yes	Identifier defined by processor or switch
880-K4	Text Indicator	A/N	1		End of text (ETX)-X'03'

Batch Detail Data Record

Record

Format: variable-length (contains both fixed- and variable-length fields)

Segment ID: 2-character segment ID (G1)

Field	Field Name	Type	Length	Key Field	Value
880-K4	Text Indicator	A/N	1		Start of text (STX) = X'02'
701	Segment Identifier	A/N	2		G1
880-K5	Transmission Reference Number	A/N	1		Reference number that the provider assigns to the batch transmission
	NCPDP Data Record		Varies		

Field	Field Name	Type	Length	Key Field	Value
880-K4	Text Indicator	A/N	1	Yes	End of text (ETX)-X'03'

Batch Trailer Record

Record

Format: fixed-length

Length: 56 characters

Segment ID: 2-character (99)

Field	Field Name	Type	Length	Key Field	Value
880-K4	Text Indicator	A/N	1		Start of text (STX) = X'02'
701	Segment Identifier	A/N	2		99
806-5C	Batch Number	N	7		Number that the sender assigns to the batch. Matches Batch Number in Header.
751	Record Count	N	10		Total number of enrollment segments in the entire file
504-F4	Message	A/N	35		Free-form message
880-K4	Text Indicator	A/N	1	Yes	End of text (ETX)-X'03'

Request Transaction Header Segment

Record

Format: fixed-length

Length: 56 characters

Field	Field Name	Type	Length	Key Field	Value
101-A1	BIN Number	9(6)	6		Card issuer ID or bank ID number used for network routing.
102-A2	Version/Release#	X(2)	2	Yes	01,03,31...51 (51 is version 5.1)
103-A3	Transaction Code	X(2)	2	Yes	E1, B1, B2, B3, C1, C2, C3, N1, N2, N3, P1, P2, P3, P4
104-A4	Processor Control #	X(10)	10		Control number assigned by the processor
109-A9	Transaction Count	X(1)	1		Blank or 1, 2, 3, 4
202-B2	Service Provider ID Qualifier	X(2)	2	Yes	01, 02, ..., 13, 14, 99 (07 is NCPDP Provider ID)
201-B1	Service Provider ID	X(15)	15	Yes	Pharmacy number or provider identifier
401-D1	Date of Service	9(8)	8		Format = CCYYMMDD
110-AK	Software Vendor/Certification ID	X(10)	10		Identifier that the switch or processor assigns to identify the software source

Response Transaction Header Segment

Record

Format: fixed-length

Length: 31 characters

Field	Field Name	Type	Length	Key Field	Value
102-A2	Version/Release#	X(2)	2	Yes	01,03,31...51 (51 is version 5.1)
103-A3	Transaction Code	X(2)	2	Yes	E1, B1, B2, B3, C1, C2, C3, N1, N2, N3, P1, P2, P3, P4
109-A9	Transaction Count	X(1)	1		Blank or 1, 2, 3, 4
501-F1	Header Response Status	X(1)	1		• A = Accept • R = Reject
202-B2	Service Provider ID Qualifier	X(2)	2	Yes	01, 02, ..., 13, 14, 99 (07 is NCPDP Provider ID)
201-B1	Service Provider ID	X(15)	15	Yes	Pharmacy number or provider identifier
401-D1	Date of Service	9(8)	8		Format = CCYYMMDD

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