IBM Sterling Gentran:Server for Microsoft Windows

User Guide

Version 5.3.1

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IBM

Contents

Chapter 1. Getting Started

About Sterling Gentran:Server

Welcome to IBM® Sterling Gentran:Server® for Microsoft Windows, the IBM EDI software for the Windows operating system.

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

- data translation
- process control
- communications system

Support for Sterling Gentran:Server

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

You can access the Sterling Gentran:Server Customer Support page (Support Portal) at:

http://www.ibm.com/support/entry/portal/Overview/Software/
Other_Software/Sterling_Gentran:Server_for_Microsoft_Windows

You can also call Customer Support at 1-800-IBM-SERV (1-800-426-7378).

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

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

Information	Description
Identification	Your company name, your name, telephone number and extension, your company's IBM customer number (ICN), and the problem management record (PMR) number (if the question refers to a previously reported issue)
System Configuration	Sterling Gentran:Server version (and any patches or options installed) and information about the primary Sterling Gentran:Server system controller and all machines experiencing problems, including • Microsoft Windows operating system version • amount of memory • available disk space • database type and version • browser version Also, please describe any recent changes in your hardware, software, or the configuration of your system.
System Data Store	Servers containing folders in the system data store

Information	Description
Error Messages	If possible, get a screen capture of any error messages and the point at which the error occurred, as well as any log files. (If you cannot get a screen capture, record the exact wording of the error.)
Attempted Solutions	Record any steps that you took attempting to resolve the problem and note all outcomes. Provide an estimate on how many times the problem occurred and whether it can be reproduced.

Sterling Gentran:Server System Components

Sterling Gentran:Server for Microsoft Windows is a combined data translation, process control, and communication system that operates within the Microsoft Windows environment.

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

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

Each system must have a primary Sterling Gentran:Server system controller, system data store, and a database.

Database

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

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

System Data Store

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

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

Process Controllers

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

- A single primary system controller - The primary system controller controls the management and dispatching of processing requests within the system, manages the audit functionality, and controls all other system components.
- One or more secondary controllers (if required) - If you purchased a distributed license, you can deploy additional controllers (secondary controllers) across the Windows network to allow the processing load to be distributed for fast and efficient throughput. The secondary controller can be either or both of the following:
  - The process controllers provide similar functions to the primary system controller. They are controlled by the primary system controller and are used to distribute processes across multiple machines in a Windows network.
  - Communication controllers regulate communication between Sterling Gentran:Server and the organizations (value-added networks (VANs) or trading partners) with whom data is exchanged. The communication controllers can support leased or dialed connections, as well as interaction with third-party communication packages using the file interface capability. A communication controller is installed via a communications gateway.

User Interface Clients

The user interface clients provide the functions that are necessary to monitor and control the system. The main data management component provides a graphical user interface to the following:
- Document locations
- Partner profiles
- Communication setup and logs
- System Audit Log
- Process control setup and management

The five main components of the Sterling Gentran:Server user interface client are the following:
- The EDI Manager window is a data management component that serves as a high-level navigation tool, as well as a document management tool. The EDI Manager also provides access to the Partner Editor, the Document Editor, Application Integration, and Forms Integration.
- Partner Editor allows you to define, edit, and delete all partner information for your company and for all of your trading partners.
- Document Editor is your data entry tool. It allows you to create, modify, and view documents.
- Application Integration is a subsystem that enables you to generate import, export, and document turnaround translation objects.
- Forms Integration is a subsystem that enables you to generate screen entry and print translation objects.

Logical Components

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

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

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

The following diagram illustrated the interaction of the logical components of the Sterling Gentran:Server system:
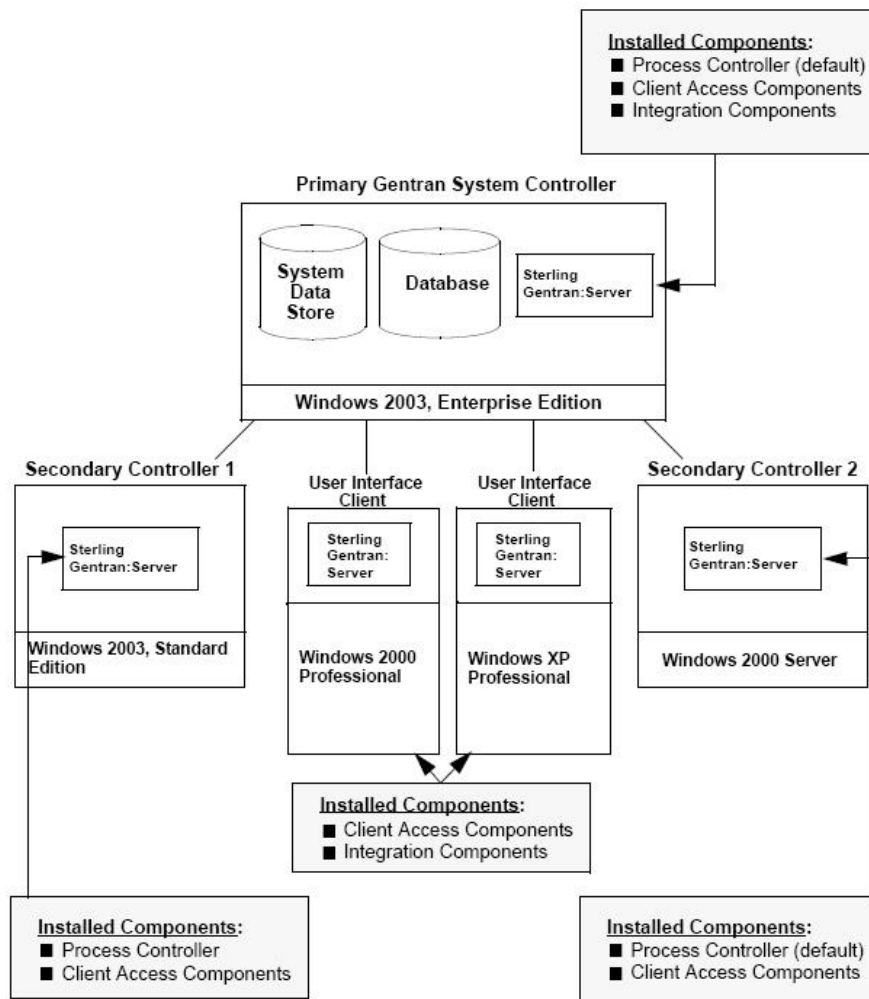
About the EDI Manager Window

The EDI Manager Window is the mail interface for Sterling Gentran:Server.

The following illustrates the Sterling Gentran:Server EDI Manager window:
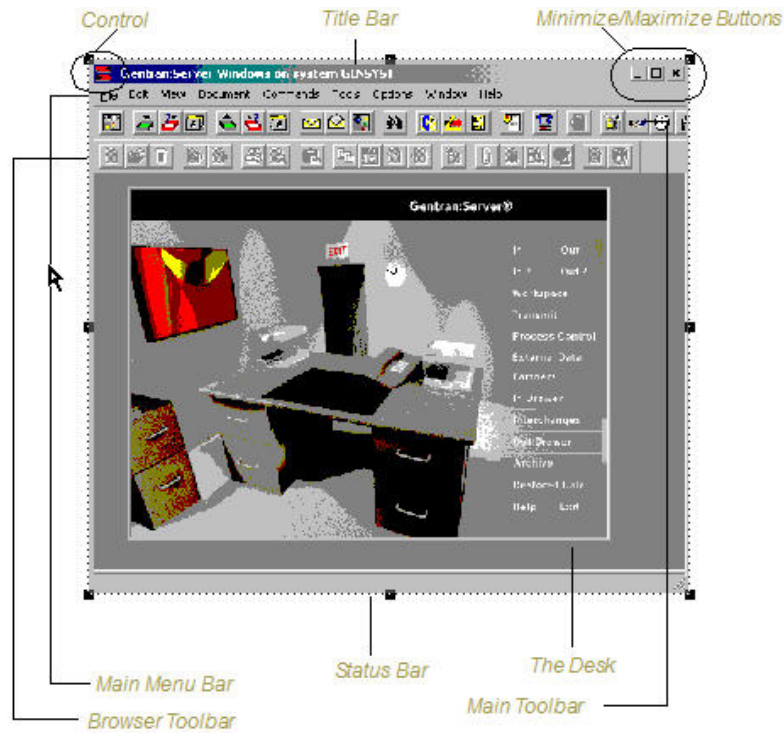
The following are the components of the main Sterling Gentran:Server window:

- The Control Menu contains the following commands: Restore, Move, Size, Minimize, Maximize, and Close.
- The Title Bar contains the name of the application and, on the Sterling Gentran:Server desktop, it displays the name of the system you are logged in to. You can use this to move the position of the EDI Manager window on your desktop.
- The Minimize button reduces the window to an icon. The Maximize button enlarges the window to its maximum size.
- The Main Menu Bar contains the drop-down menus. Detailed descriptions of each of the commands on these menus are found in the Online Help. Unavailable items are dimmed.
- The Main Toolbar gives you access to some of the most common browsers and functions in Sterling Gentran:Server. Unavailable items are dimmed. The Main Toolbar is a dockable toolbar, so you can affix it to any edge of the EDI Manager window. The following illustrates the Main Toolbar.
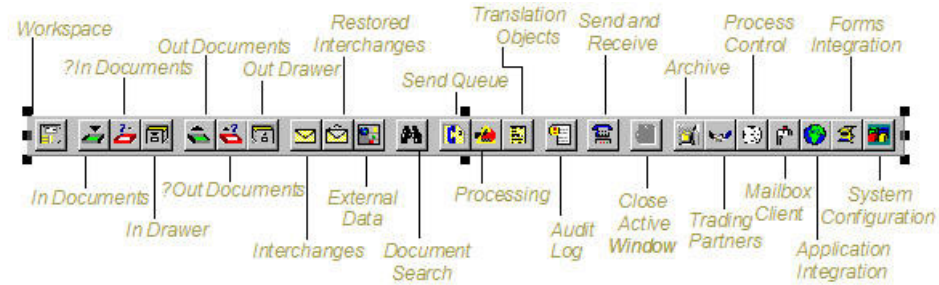
- The Browser Toolbar gives you access to the functions that are available from browsers in Sterling Gentran:Server. Unavailable items are dimmed. The Browser Toolbar is a dockable toolbar, so you can affix it to any edge of the EDI Manager window. The following illustrates the Browser Toolbar:
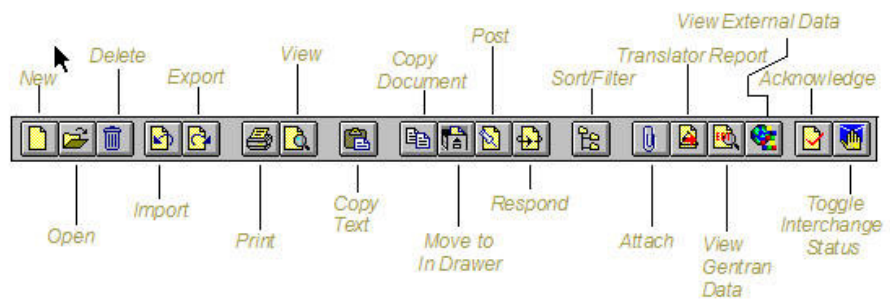
- The Desk is a graphic representation of the Sterling Gentran:Server components and document locations. It provides a quick and easy way to access some of the most commonly used browsers, functions, and subsystems of Sterling Gentran:Server. You can click the appropriate part of The Desk any time you need to access a browser, function, or subsystem represented on The Desk.

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

- The Status Bar displays status information about a selection, command, or process, defines menu items as you highlight each item in the menu, and indicates any current keyboard-initiated modes for typing.

Inbound Translation Process

The following diagram illustrates the inbound translation process:

Table 1. Inbound Translation Process

Stage	Description
1	The Communicator receives interchanges from your trading partners through a network.
2	The Communicator passes the interchanges to the translator.
3	The translator uses a system interchange break translation object to unwrap the interchange envelopes and separate each group into temporary storage.
4	The translator uses a system group break translation object to unwrap the group envelopes and separate each transaction set into temporary storage.
5	The translator uses a system transaction break translation object to do the following: • Unwrap the transaction envelopes. • Separate each document into a separate file on the system data store. • Write a record to the database with reference information about the document.

Table 1. Inbound Translation Process (continued)

Stage	Description
6	Does the translator locate a trading relationship for each document?
	• If yes (a trading relationship is located), the translator attempts to identify the export, document turnaround, or print translation object associated with that relationship. If the translator locates a trading relationship and translation object, it uses that translation object to compliance check the document.
	• If no (the translator does not locate the trading relationship or translation object), the document is marked as not compliant and is moved to ?In Documents.
7	Is the document compliant with the EDI standard?
	• If yes, the translator changes the document status to compliant and moves the document to In Documents.
	• If no, the document remains in ?In Documents. The translator writes a detailed error report to help you determine the problem that was encountered.
8	In the trading relationship, if you specify that the system needs to generate a functional acknowledgement for a document, the translator uses the system acknowledgement translation object to generate the acknowledgement.
	• Compliant acknowledgements are moved to Out Documents to be sent.
	• Non-compliant acknowledgements are moved to ?Out Documents. If an error occurred with the acknowledgement translation object, the acknowledgement is also moved to ?Out Documents.
	The translator also reconciles acknowledgements if you receive an acknowledgement-type transaction (such as 997 or CONTRL).
9	If you specified either automatic export or automatic turnaround in the trading relationship, the translator uses the specified export or document turnaround translation object to either export or generate the appropriate response document.

Outbound Translation Process

The following diagram illustrates the outbound translation process:

Table 2. Outbound Translation Process

Stage	Description
1	Use one of the following three processes to initiate an outbound translation: • Import a file through the process control system using a timed or polled session. This writes all valid documents to the database with a compliant status and moves the documents to Out Documents. Invalid documents are marked with a non-compliant status and are moved to ?Out Documents. • Import an application file. Documents that you import manually are located in the Workspace. • Use the Document Editor to enter documents (if there is an appropriate data entry translation object registered with Sterling Gentran:Server). These documents are located in the Workspace.
2	If you import a file, the translator checks the import definitions from the system configuration to match the file name with a system import translation object.

Table 2. Outbound Translation Process (continued)

Stage	Description
3	The translator uses the system import translation object to determine which trading relationship (established in Partner Editor) corresponds to each document in the application file, so the system knows which import map to use to process the document.
4	The translator ascertains which import translation object is specified in the trading relationship.
5	The translator uses the import translation object to compliance check the document. If the document is compliant (valid), it is marked OK. If the document is not compliant (invalid), it is marked NotOK.
6	If there is another document remaining in the import file, the translator repeats steps 3 - 5 until all documents are processed.
7	If you manually import a file through the EDI Manager or use the Document Editor, you need to post the compliant document to Out Documents.Once documents are located in Out Documents, they can be sent using the process control system or by using the EDI Manager transmit option.

Changing your Password

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

About this task

Notes:

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

Use this procedure to change your password.

Procedure

1. Select **Options > Preferences**.

   The Preferences dialog box is displayed.
2. Select the **Change Password** tab.
3. Enter your old password.
4. Enter your new password twice (for confirmation).

   Note: Passwords can be up to 126 characters long.
5. Click **OK** to save the changes.

   The system is updated and the next time you log on to the system you will need to enter the new password.

Setting up an External Text Editor

You can select an external editor so you can view, edit, and save your documents outside of the Sterling Gentran:Server EDI Manager.

About this task

Use this procedure to set up an external application for editing documents.

Procedure
1. Select **Options > Preferences**.
2. Click the **Document Viewer** tab.
3. Navigate to the executable file for the text editor.
   For example: `C:\Program Files (x86)\TextPad 4\TextPad.exe`
4. Click **OK**.

Chapter 2. Translation Objects

About Translation Objects

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

Translation objects are created by compiling an application map or a form definition using the Application or Forms Integration subsystem in Sterling Gentran:Server.

See the *IBM Sterling Gentran:Server for Microsoft Windows Application Integration User Guide* and *IBM Sterling Gentran:Server for Microsoft Windows Forms Integration User Guide* more information about those subsystems.

There are two types of translation objects:

- System translation objects control the creation and separation of interchanges, functional groups, and transaction sets. They are also used to generate and reconcile functional acknowledgements.
- User translation objects control screen entry, importing, exporting, and creating printed reports. All required system translation objects are automatically installed with the Sterling Gentran:Server system.

EDI Translation Object Browser

EDI Translation Object browser allows you to view, print, delete, and register translation objects.

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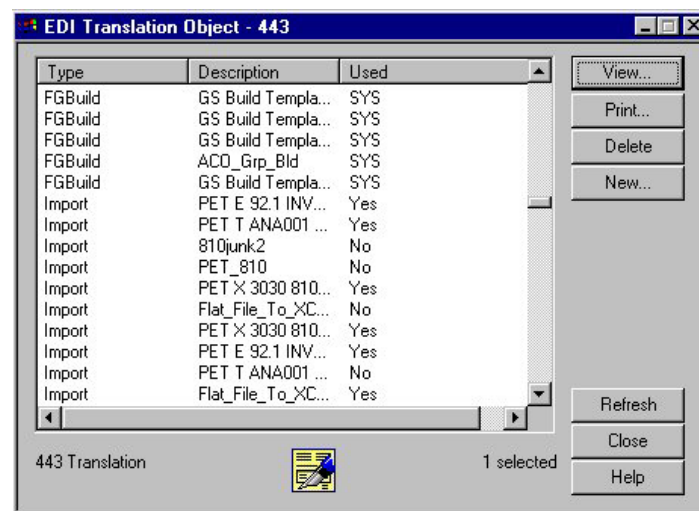
The following lists the parts of the EDI Translation Object browser and their functions.

Part	Function
Type	Describes the type of translation object defined, such as export, import, or system import.
Description	Displays a description that further identifies the translation object.
Used	Indicates whether the translation object is currently associated with an Inbound or Outbound Partner Relationship. Valid values are: • Yes - Indicates the translation object is in use. • No - Indicates the translation object is not in use. • SYS* - Indicates a system translation object that is in use. • SYS - Indicates a system translation object that is not in use **Note:** If a translation object is currently used (associated with an Inbound or Outbound Partner Relationship), you cannot delete it. Also, the system prevents you from deleting translation objects that are designated as system translation objects (SYS* or SYS). System Translation Objects are all translation objects except Import, Export, Data Entry, Screen Entry, Turn Around, and Print. Also, any translation object with "system" in the description is a system translation object.
View	Displays a window containing descriptive information for the selected translation object, including the following: • Description of the translation object • Type of translation object (for example, Export) • Input and output agency (for example, X for ANSI X12) • Input and output version (for example, 003030) • Input and output transaction ID (for example, 850) • Input and output release (for TRADACOMS only) • File name of the translation object (for example, 3030.tpl)
Print	Displays the Print Choice dialog box, which allows you to specify whether you want to print the selected translation objects or print a summary list of the selected translation objects. **Note:** The Formatted option is unavailable because a formatted version is always printed for a translation object.

Registering New Translation Objects

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

About this task

You can set the auto-register feature to automatically register translation objects when they are compiled. See the topic on setting the auto-register option in the *IBM Sterling Gentran:Server for Microsoft Windows Application Integration User Guide*.

Use this procedure to register a translation object.

Procedure

1. Select **View > Translation Objects**.

   The system displays the EDI Translation Object browser.

2. Click **New**.

   The system displays the Register Translation Object dialog box.
3. Select the translation object file that you want to register with the system from the list or type it in the File name box.
4. Click **Open**.

   The system registers the translation object files exits the Register Translation Object dialog box.

   Notes:
   - If the selected file is invalid, you receive a warning message. Only valid Sterling Gentran:Server translation object files can be installed.
   - If the translation object is a duplicate, you are prompted with a message asking whether or not you want to overwrite the existing translation object.

Deleting Translation Objects

You can delete old or unused translation objects from the system only if they are not currently associated with an Inbound or Outbound Partner Relationship. This displays as "No" in the Used column on the EDI Translation Object browser.

About this task

Note: The system prevents you from deleting translation objects that are designated as system translation objects.

Use this procedure to delete a translation object.

Procedure

1. Select **View > Translation Objects**.

   The EDI Translation Object browser is displayed.
2. Select the translation object or objects you want to delete.
3. Click **Delete**.

   The Delete confirmation dialog box is displayed.
4. Click **Yes** to confirm the delete.

Chapter 3. Trading Partners

About the 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.

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

Partner relationships allow you to send and receive data to and from your trading partners. A partner profile begins with a partner definition. The partner definition contains the basic information about that partner that the system needs before you define the rest of the partner profile. You need to create a partner definition for each partner with whom you are going to exchange data.

For information about defining partners for use with RosettaNet, see the topic on using the Partner Editor in the *IBM Sterling Gentran:Server for Microsoft Windows for RosettaNet User Guide*.

Partner Profiles

Methods for Creating Partner Profiles

Partner profiles define the parameters that control the processing and structure of inbound and outbound data for each partner.

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

Partner profile creation method	When to use
Import existing profile	Use this method if you receive partner profiles from IBM or if you have an existing profile from which you can import partner details. The profile can be exported from another copy of the Sterling Gentran:Server system.
	See Importing Partner Profiles for more information.
Copy existing profile	Use this method when you have an existing profile that you can copy and then enter a unique partner definition and key enveloping information for the copied partner.
	See Copying Partner Profiles for more information.
Create a new profile	Use this method when you do not have a profile to import or copy.
	See Process of defining a partner profile for more information.

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

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

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

Process for defining a partner profile

The following describes the partner profile creation process:

Stage	Description
1	Create the partner definition. See Creating a Partner Definition.
2	If necessary, create the inbound relationship. See Creating an Inbound Relationship .
3	If necessary, create the outbound relationship. See Creating an Outbound Relationship.
4	To use a cross-reference or lookup table with the partner relationship to supplement or convert data you enter or receive, see Creating Partner Tables.
5	To use locations to contain address- and contact-related information about the partner, see Creating Partner Locations .

Partner Editor Dialog Box

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

The following illustrates the Partner Editor dialog box:
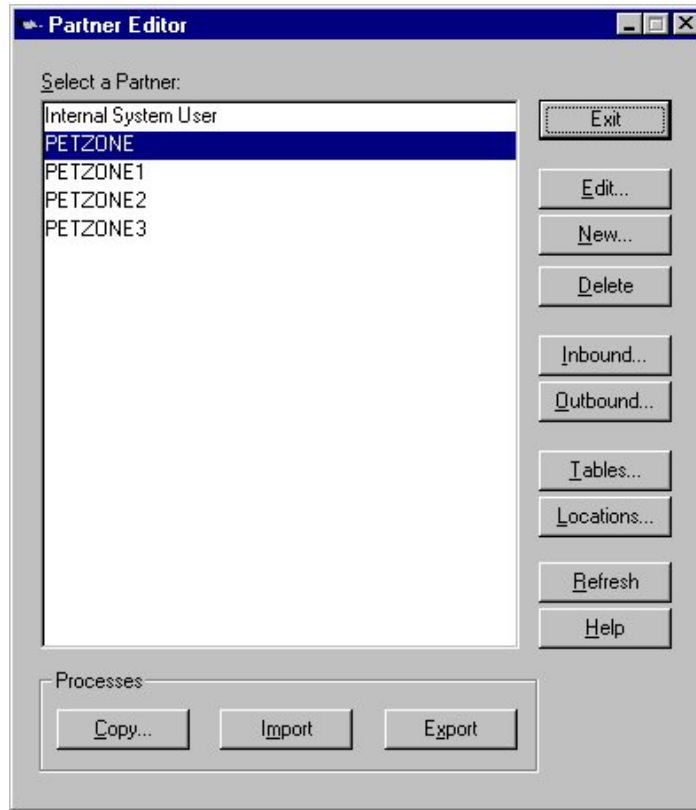
The following describes the parts of the Partner Editor dialog box.

Part	Function
Select a Partner	Displays the list of partner profiles to select from.
Copy	Displays the Partner Copy Dialog Box, which allows you to copy a partner profile.
Import	Displays the Import File Select Dialog Box, which allows you to import a partner profile.
Export	Displays the Export File Build Dialog Box, which allows you to export a partner profile.
Edit	Displays the Partner Definition (New/Edit) Dialog Box, which allows you to change information about the selected partner.
Inbound	Displays the Inbound Relationship Dialog Box for the selected partner.
Outbound	Displays the Outbound Relationship Dialog Box for the selected partner.
Tables	Displays the Partner Tables Dialog Box for the selected partner.
Locations	Displays the Location Select Dialog Box for the selected partner.
Refresh	Refreshes the dialog box display.

Partner Definition (New/Edit) Dialog Box

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

The following illustrates the Partner Definition - New dialog box:
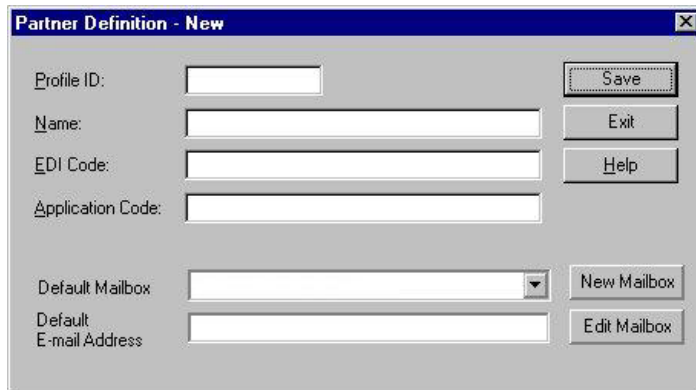
Note: See the *IBM Sterling Gentran:Server for Microsoft Windows Communications User Guide* for more information.

The following describes the parts of the Partner Definition dialog box.

Part	Function
Profile ID	Specify a unique identifier for the selected partner.
Name	Specify a unique name for the partner. **Note:** Make this name as descriptive as possible, because this is the name displayed in the partner selection list.
EDI Code	Specify the EDI identifier for this partner. The system uses this value during inbound processing to select the correct trading partner definition.
Application Code	Specify an application code used to identify this partner. The system uses this value during outbound import processing to select the correct trading partner definition.
Default Mailbox	Select a default mailbox to use to identify this partner for non-RosettaNet EDI relationships.
Default E-mail Address	Specify a default e-mail address to use to identify this partner for non-RosettaNet 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 an EDI document from a trading partner. The Inbound Relationship dialog box controls other subordinate dialogs that allow you to define everything that is necessary to establish the relationship.

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

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

The following describes the parts of the Inbound Relationship dialog box.

Part	Function
Relationship Description	Select the existing inbound relationship.
Standard	Specifies the EDI 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 are: • A - TRADACOMS • C - CII • D - NCPDP • E - EDIFACT • O - ODETTE • P - OTHER • R - ROSETTANET • T - TDCC • U - UCS • V - VDA • X - X12
Version	Select the EDI 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	Select the transaction set 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	Select the release number to be used in this relationship. **Note:** Only releases for the selected transaction set for which you have existing translation objects are displayed. This box is currently only used for messages defined in the TRADACOMS standard. Selection of this box is mandatory for all TRADACOMS messages.
Transaction is an Acknowledgement	Specify if the transaction defined in this partner relationship is an acknowledgement.
Groups	Accesses the Inbound Group Select Dialog Box.
Interchanges	Accesses the Inbound Interchange Select Dialog Box.
Sequence Checking	Specify if the system will use sequence checking and whether sequence checking will be incremental or chronological. You can also indicate that the system must check for duplicate control numbers. • None - Do not use sequence checking. • Duplicate - Check for duplicate control numbers. • Incremental - The control number must be one greater than the last number. • Chronological - The control number must be greater than the last number. **Note:** If the system detects duplicate control numbers or detects incremental or chronological control numbers that are out of sequence, those documents will be put in the ?In Documents.
Last Used Control Number	Specify a value that is used to sequence check the next transaction set control number or message reference. This value is replaced with the sequence number of the last transaction set or message received. This box is initially set to zero. **Note:** This box is disabled if Sequence Checking is None.
Duplicate Documents	Specify if the system will check for duplicate document names. **Notes::** • If the system detects duplicate document name it will locate those documents in ?In Documents. • If duplicate document checking is activated for a relationship the translation object used in this relationship must update the document name via a standard or extended rule. See the *IBM Sterling Gentran:Server for Microsoft Windows Application Integration User Guide* for more information about using standard and extended rules.
Skip Compliance Check	Specify if you want the system to compliance check the documents for this relationship.

Part	Function
Generate Acknowledgements	Instructs the system to generate a functional acknowledgement to this trading partner when you receive the transaction set (message) defined in this relationship. The default value for this box is No. Valid values: • 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 (dimmed) if the document (transaction set) in this relationship is an acknowledgement.
Test Indicator	Specify if this relationship definition is in test or production mode. The default value is Production.
Acknowledgement Processing	Specify if acknowledgement reconciliation will occur during the inbound break session (Immediate) or during its scheduled interval (Deferred). The default is Immediate.
Delete	Removes the specified inbound relationship from the system.
Translation	Accesses the Inbound Translation Object Dialog Box.
Advanced	Displays the advanced options.

Inbound Translation Object Dialog Box

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

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

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

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

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

The following describes the parts of the Inbound Translation Object dialog box.

Part	Function
Select Translation Objects **Notes:** • The lists display all translation objects registered in the system that are appropriate for the type of translation object (such as Export or Print) and the transaction set. • If there are no translation objects displayed in the drop-down lists, no translation objects of that type are registered for the version of the document defined in the relationship.	
Turn Around/Auto	Displays all turnaround document options. When a document is received, the turnaround document created is the natural response document that contains as many elements from the received document as possible. **Note:** Select the Auto check box if you want the defined turnaround process to be automatic. If the Auto box is not selected, the received document will remain in the In Documents until it is selected for processing.

Part	Function
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 an EDI document is received, it will be exported into an output file. **Notes::** • Select the Auto check box if you want the export file created automatically upon receipt of the document. If the Auto box is not selected, the received document will remain in the In Documents until it is selected for processing. • If the Export File Name is defined for this relationship, each document can be exported individually to a unique file. If you use formatting characters in the file name, the document key changes for each document that is exported, the Process ID stays the same (for all documents exported from the same interchange), and the unique ID changes. Therefore, using the "document key" and "unique ID" special characters (defined below), a unique file name can be derived.
Print	Displays all print translation objects on the system for the Standard, Version, Transaction Set, and Release defined by the relationship. The selected translation object will be used to print documents received from this partner.

Part	Function
Export File Name	Specify the name of the file to be created or appended to as a result of performing an export operation. This file name can contain a mix of alphanumeric characters and formatting characters, which are replaced by the translator with the runtime value they represent. **Notes:** • The filename can contain a mix of regular characters and formatting characters that are replaced by the translator with the runtime values they represent. • You can use a special character, such as an underscore, to separate values with the filename. For example, you could specify %Y_%M_%D to indicate year_month_day as the filename. However, do not use a period in a filename to separate values. A period can only be used to indicate the filename extension, such as .txt. **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 (document 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. The following is an example of a runtime file name using formatting characters: `d:\GENSRVNT\exports\dockey%Kprocid%Puniqueid%U.dat`
Export to Mailbox	

Part	Function
Export to Mailbox	Invokes the "Export to Mailbox" function, which delivers the output of an inbound translation to the Mailbox Server Manager. This allows the Mailbox Server Manager to act as a message broker responsible for delivering the data to its final destination. **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` a new attachment is created for each document because the document key creates a unique name for each document processed. To set up an export to a mailbox, you must complete the following components on the Inbound Translation Objects dialog box: • In the Export File Name box, type the file name. • Select the Export to Mailbox checkbox. • From the Recipient Mailbox list, select the mailbox (the Recipient E-mail Address is optional). • In the Content Type/SubType box, type a content type (content subtype is optional).
Use Partner Default Mailbox and E-mail Address	Specify if the output of the inbound translation is exported to the default mailbox and e-mail address configured for this partner.
Recipient Mailbox/△New Mailbox	Select the mailbox to which the output of an inbound translation is delivered. Optionally, click New Mailbox to display the Create New Mailbox wizard, which allows you to create a new mailbox.
Recipient E-mail Address/△Edit Mailbox	Specify the e-mail address to which the output of an inbound translation is delivered. Optionally, click Edit Mailbox to display the Create New Mailbox wizard, which allows you to edit the mailbox.
Content Type/SubType	Specify the content type/sub type of the message containing the output of the inbound translation.
Application ID	Specify the application identifier that indicates the destination of the documents.
Application Alias Value	Specify criteria for this relationship definition that is used during the application import function. Example: The application contains data that can generate either an invoice or a credit memo. Use one relationship definition for invoices and another for credit memos. There is a box in the application that defines whether this is an invoice or a credit memo. The box will display CREDIT if a credit memo is created and INVOICE if an invoice is created. Type CREDIT in the Application Alias Value for the relationship defining the credit memo and type INVOICE for the invoice. **Note:** This box is only used if you receive translation objects that are defined to use the Application Alias Value.
Additional Translation Objects	

Part	Function
Import	Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. **Note:** You must select a translation object from the Import list if you have created a specific import translation object for this relationship and if you want to change the way the system behaves for this partner relationship. Import translation objects may not be appropriate for an Inbound Relationship.
Data Entry	Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. **Note:** You must select a translation object from the Data Entry list if you have created a specific data entry translation object for this relationship and if you want to change the way the system behaves for this partner relationship (e.g., if you want to change the formatted view of Inbound data).
Transaction	Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. **Note:** You must select a translation object from the Transaction list if you have created a specific Transaction Break translation object for this relationship and if you want to change the way the system behaves for this partner relationship.
Acknowledge	Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. **Note:** You must select a translation object from the Acknowledge list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner relationship. 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 transaction set is an acknowledgement and you choose an Acknowledge additional translation object, the system will use the additional translation object in place of the export translation object for acknowledgement reconciliation.

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

The following illustrates the Inbound Group Select dialog box:

The following describes the parts of the Inbound Group Select dialog box.

Part	Function
Groups	Displays all functional group definitions established for this trading partner.
Select	Selects the indicated functional group to be used with this relationship. **Note:** Select <none> if the standard you are using does not require groups and you do not want to use one.

Inbound Group Entry Dialog Box

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

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

The following describes the parts of the Inbound Group Entry dialog box.

Part	Function
Description	Specify the name of the functional group description.

Part	Function
Standard	Displays the EDI standard the system is using for this relationship definition.
Version	Displays the version of the EDI standard the system is using for this relationship.
Functional Group ID	Specify the functional group. These identification boxes are defined by each appropriate standards group to group like documents. The standard defines which functional group ID should be used with each document type. This is a mandatory box. **Examples** • IN 810 - X12 Invoice • PO - 850 X12 Purchase Order • IG - 830 UCS Invoice • OG - 875 UCS P. O. • INVOIC - EDIFACT INVOIC • ORDERS - EDIFACT ORDERS • INVOIC - Tradacoms INVOIC • ORDERS - Tradacoms ORDERS This element is located in: • ANSI X12 - GS01 • EDIFACT - UNG01 • TRADACOMS - BAT
Sequence Checking	Specify if inbound sequence checking will be used and whether the type of sequence checking will be incremental or chronological. You can also indicate that the system must check for duplicate control numbers. • None - Do not use sequence checking. • Duplicate - Check for duplicate control numbers. • Incremental - The control number must be one greater than the last number. • Chronological - The control number must be greater than the last number. **Note:** If the system detects duplicate control numbers or detects incremental or chronological control numbers that are out of sequence, those documents will be put in the ?In Documents.
Last Used Group Control Number	Specifies a value that the system will use to sequence check the group control number. The number will be replaced by the group control number that the system receives. This box will initially be set to zero.
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 not checked (do not expect an acknowledgement). **Note:** This check box is dimmed (inactive) if the transaction set is an acknowledgement.

Part	Function
Ack Translation Set ID	Select the acknowledgement you want generated for this group. **Example** • ANSI X12 - 997 Functional Acknowledgement • UCS/EDIA - 999 Acceptance/Rejection Advice • EDIFACT - CNTRL
Group Transl. Obj.	Select a partner-specific Group Break Map translation object if this trading partner group deviates from the normal system behavior. You must select a translation object from this list if you want the system to perform partner-specific grouping. **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.	Select an Acknowledgement Break Map if one exists on the system. **Note:** You must select a translation object from the Acknowledge Transl. Obj. list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner group. When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list. **Important:** We strongly recommend that you do not change the translation objects in the Group Transl. Obj. and Acknowledge Transl. lists, unless you have a specific reason for doing so.

Inbound Interchange Select Dialog Box

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

The following illustrates the Inbound Interchange Select dialog box:

The following describes the parts of the Inbound Interchange Select dialog box.

Part	Function
Interchanges	Displays all Interchange definitions established for this trading partner.

Part	Function
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.

Inbound Interchange Entry Dialog Box

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

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

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

The following describes the parts of the Inbound Interchange Entry dialog box.

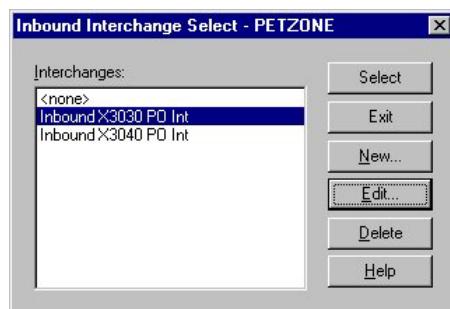| Part	Function
Description	Contains the name of the interchange description.
Standard	Displays the EDI standard the system is using for this relationship definition.
Version	Displays the version of the EDI standard the system is using for this relationship.

Part	Function
Interchange ID	Select the type of interchange. The standard defines which interchange ID should be used with each standard. This is a mandatory box. **Examples** • ANSI X12 - ISA • ANSI X12 - ICS • UCS - BG • EDIFACT - UNB • Tradacoms - STX
Sequence Checking	Specify if the system will use sequence checking and whether the sequence checking will be incremental or chronological. You can also indicate that the system must check for duplicate control numbers. • None - Do not use sequence checking. • Duplicate - Check for duplicate control numbers. • Incremental - The control number must be one greater than the last number. • Chronological - The control number must be greater than the last number. **Note:** If the system detects duplicate control numbers or detects incremental or chronological control numbers that are out of sequence, those documents will be put in the ?In Documents.
Last Used Control Number	Specifies a value that will be used to sequence check the next interchange control number. The number will be replaced by the control number on the last interchange received. This box will initially be set to zero. **Note:** This box is disabled 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 not checked (do not expect an acknowledgement).
Ack Translation Set ID	Select the acknowledgement you want generated for this interchange. **Examples** • ANSI X12 - 997 Functional Acknowledgement • UCS/EDIA - 999 Acceptance/Rejection Advice • EDIFACT - CNTRL
Interchange Transl. Obj.	Select a partner-specific Interchange Break Map translation object if this trading partner interchange deviates from the normal system behavior. You must select a translation object from this list if you want the system to perform partner-specific interchanging. **Important:** We strongly recommend that you do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.

Part	Function
Acknowledge Transl. Obj.	Select an Acknowledgement Break Map if one exists on the system. You must select a translation object from the Acknowledge Transl. Obj. list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner interchange. When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list. **Important:** We strongly recommend that you do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.

Outbound Relationship Dialog Box

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

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

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

The following describes the parts of the Outbound Relationship dialog box.

Part	Function
Relationship Description	Select the relationship description.

Part	Function
Standard	Specifies the EDI 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 are: • A-TRADACOMS • C-CII • D-NCPDP • E-EDIFACT • O-ODETTE • P-OTHER • R-ROSETTANET • T-TDCC • U-UCS • V-VDA • X-X12
Version	Select the EDI 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.
Transaction Set	Select the transaction set 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	Select the release number to be used in this relationship. **Note:** Only releases for the selected transaction set for which you have existing translation objects will be displayed. This box is currently only used for messages defined in the TRADACOMS standard. Selection of this box is mandatory for all TRADACOMS messages.
Groups	Accesses the Outbound Group Select Dialog Box.
Interchanges	Accesses the Outbound Interchange Select Dialog Box.
Last Used Control Number	Specify a value that will be used to generate the next transaction set control number or message reference. The number generated will always be one more than the number in this box. Initially, this box will be set to zero.
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 transaction set (message) defined in this relationship. The default value for this box is not checked (do not expect an acknowledgement).

Part	Function
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 checked. The default value for this box is "48," indicating that the acknowledgement will be considered overdue in two days. If you enter a value of zero in this box, the acknowledgement will be immediately considered overdue. **Note:** This box is disabled if Expect Acknowledgement is not checked.
Duplicate Documents	Instructs the system to check for duplicate document names. **Notes::** • If you manually import documents into the Workspace, this function checks for duplicate documents. Duplicate documents remain in the Workspace until they are deleted. If you try to move or post a duplicate document, a warning message is displayed. If you use the Process Control import feature to import documents, the duplicate document is located in ?Out Documents. • If duplicate document checking is activated for a relationship, the translation object used in this relationship must update the document name via a standard or extended rule. See the *IBM Sterling Gentran:Server for Microsoft Windows Application Integration User Guide* for more information about using standard and extended rules.
Test Indicator	Specify if this relationship definition is in test or production mode. The default value is production.
Translation	Accesses the Outbound Translation Object Dialog Box.
Envelope	Accesses one of the following Outbound Envelope dialog boxes depending on which version you specified: • Outbound UNH Envelope • Outbound MHD Envelope • Outbound ST Envelope
Advanced	Displays the advanced options.

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.

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

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

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

The following describes the parts of the Outbound Translation Object dialog box.

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

Part	Function
TurnAround	Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. You must select a translation object from the TurnAround list if you have created a specific turnaround translation object for this relationship and if you want to change the way the system behaves for this partner relationship. **Note:** TurnAround translation objects may not be appropriate for an Outbound Relationship.
Export	Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. You must select a translation object from the Export list if you have created a specific export translation object for this relationship and if you want to change the way the system behaves for this partner relationship. Export translation objects are used to export an outbound document to a file.
Transaction	Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. You must select a translation object from the Transaction list if you have created a specific Transaction Build translation object for this relationship and if you want to change the way the system behaves for this partner relationship.
Acknowledge	Select other translation objects associated with the relationship, which gives you the capability to change the system behavior at the transaction and document translation level. This allows you to use translation objects that are as partner-specific as required and/or perform as many functions as required. You must select a translation object from the Acknowledge list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner relationship. When the system generates an acknowledgement, it writes the acknowledgement to an internal file containing the acknowledgement details and then maps that internal file. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list.

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.

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

The following illustrates the Outbound Group Select dialog box:
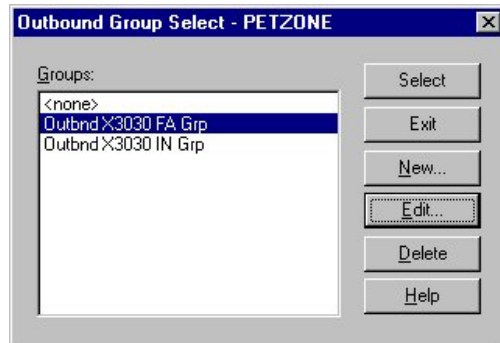
The following describes the parts of the Outbound Group Select dialog box.

Part	Function
Groups	Displays all functional group definitions established for this trading partner.
Select	Selects the indicated functional group as the one the system uses for this relationship.

Outbound Group Entry Dialog Box

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

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

The following describes the parts of the Outbound Group Entry dialog box.

Part	Function
Description	Specify the name of the functional group description.
Standard	Displays the EDI standard the system is using for this relationship definition.
Version	Displays the version of the EDI standard the system is using for this relationship.
Functional Group ID	Specifies the functional group. These identification boxes are defined by each appropriate standards group to group like documents. The standard defines which functional group ID should be used with each document type. This is a mandatory box. **Examples** • IN 810 - X12 Invoice • PO - 850 X12 Purchase Order • IG - 830 UCS Invoice • OG - 875 UCS P. O. • INVOIC - EDIFACT INVOIC • ORDERS - EDIFACT ORDERS • INVOIC - Tradacoms INVOIC • ORDERS - Tradacoms ORDERS This element is located in: • ANSI X12 - GS01 • EDIFACT - UNG01 • TRADACOMS - BAT
Last Used Group Control Number	Specify a value that is used to generate the next interchange control number. The number generated will always be one more than the number in this box. This box will initially be set to zero. **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	Instruct the system to expect a functional acknowledgement to be received from this trading partner as a result of your partner receiving the group defined in this relationship. The default value for this box is not checked (do not expect an acknowledgement).
Hours Overdue	Specify how many hours must elapse before an expected functional acknowledgement is considered overdue. This box is only valid if the Expect Acknowledgement box is checked. The default value for this box is "48," indicating that the acknowledgement will be considered overdue in two days. If you enter a value of "0" (zero) in this box, the acknowledgement will be immediately considered overdue. **Note:** This box is disabled if Expect Acknowledgement is not checked.
Sequence From Group	Specify if the transaction set control number options for this group setup should be controlled at the group level. If this box is not checked, the following two fields are disabled.
Last Used Control Number	Specify a value that will be used to generate the next transaction set control number for the sets defined within this functional group. The number generated will always be one more than the number in this box. This box will initially be set to zero. **Note:** This box is disabled if Sequence From Group is not checked.

Part	Function
Format	Select the format of the transaction set control number that will be generated:
	• **Normal** - The number will be generated by incrementing the last used control number. The length of the number will be defined by the standard.
	• **6/3** - The number will be a composite of two numbers. The first six digits are the last six digits of the functional group control number. The last three digits are a counter beginning at "1" within the functional group. Use this format only as instructed by your trading partner.
	• **5/4** - The number will be a composite of two numbers. The first five digits are the last five digits of the functional group control number. The last four digits are a counter beginning at "1" within the functional group. This is the normal TDCC numbering convention. It is used by the Motor, Rail, and Ocean transportation industries.
	• **5/3** - The number will be a composite of two numbers. The first five digits are the last five digits of the functional group control number. The last three digits are a counter beginning at "1" within the functional group. This is the normal UCS convention, which is used by the Grocery and Warehousing industries.
	Note: This box is disabled if Sequence From Group is not checked.
Group Transl. Obj.	Select a partner-specific Group Build Map translation object if this trading partner group deviates from the normal system behavior. You must select a translation object from this list if you want the system to perform partner-specific grouping. **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.	Select an Acknowledgement Build Map if one exists on the system.
	You must select a translation object from the Acknowledge Transl. Obj. list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner group. When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list. **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.
Envelope	Accesses one of the following Outbound Functional Group Envelope dialog boxes depending on which version you specified on the Outbound Relationship Dialog Box:
	• Outbound GS Functional Group
	• Outbound UNG Functional Group
	• Outbound BAT Functional Group
	Refer to the Partner Editor online help for specific information about the envelope dialog boxes.

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 EDIFACT, ODETTE, TRADACOMS, and UCS, and are optional for ANSI X12 and TDCC.

The following illustrates the Outbound Interchange Select dialog box:

The following describes the parts of the Outbound Interchange Select dialog box.

Part	Function
Interchanges	Displays all interchange definitions established for this trading partner.
Select	Selects the indicated interchange to be used with this relationship. **Note:** Select <none> if the standard you are using does not require interchanges and you do not want to use one.

Outbound Interchange Entry Dialog Box

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

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

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

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

The following describes the parts of the Outbound Interchange Entry dialog box.

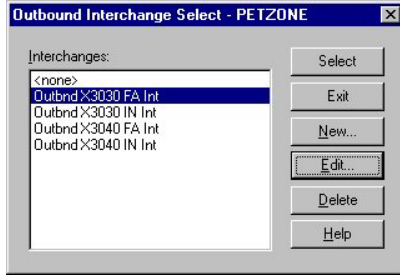| Part	Function
Description	Displays the name of the interchange description.
Standard	Displays the EDI standard the system is using for this relationship definition.
Version	Displays the version of the EDI standard the system is using for this relationship.
Interchange ID	Displays the type of interchange you specified. The standard defines which interchange ID should be used with each standard. This is a mandatory box. **Examples** • ANSI X12 - ISA • ANSI X12 - ICS • UCS - BG • EDIFACT - UNB • Tradacoms - STX
Use the default Mailbox and E-mail Address	Specify that the system will use the default Mailbox and E-mail address specified on the Partner Definition (New/Edit) Dialog Box.
Mailbox/△New Mailbox	Specify a mailbox to use to identify this partner for RosettaNet relationships. Optionally, click New Mailbox to display the Create New Mailbox wizard, which allows you to create a new mailbox.

Part	Function
E-mail Address/⌂Edit Mailbox	Specify an e-mail address to identify this partner for RosettaNet relationships. Optionally, click Edit Mailbox to display the Mailbox Properties dialog box, which allows you to edit the mailbox.
Content Type	Specify the content type of the interchange.
Set Max Number of Documents per Interchange	Instruct the system to only allow the specified maximum number of documents per interchange for this relationship.
Max Number of Documents per Interchange	Specify the maximum number of documents allowed per interchange for this relationship.
Last Used Control Number	Specify a value that will be used to generate the next interchange control number. The number generated is always one more than the number in this box. Initially, this box will be set to zero.
Expect Acknowledgement	Instruct the system to expect a functional acknowledgement to be received from this trading partner as a result of your partner receiving the interchange set defined in this relationship. The default value for this box is not checked (do not expect an acknowledgement).
Hours Overdue	Specify how many hours must elapse before an expected functional acknowledgement is considered overdue. This box is only valid if the Expect Acknowledgement box is checked. The default value for this box is "48," indicating that the acknowledgement will be considered overdue in two days. If you enter a value of zero in this box, the acknowledgement will be immediately considered overdue. **Note:** This box is disabled if Expect Acknowledgement is *not* checked.
Interchange Transl. Obj.	Select a partner-specific Interchange Build Map translation object if this trading partner interchange deviates from the normal system behavior. You must select a translation object from this list if you want the system to perform partner-specific interchanging. **Important:** We strongly recommend that you do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.
Acknowledge Transl. Obj.	Select an Acknowledgement Build Map if one exists on the system. You must select a translation object from the Acknowledge Transl. Obj. list if you have created a specific translation object for this relationship and if you want to change the way the system behaves for this partner interchange. When the system reconciles an acknowledgement, it maps the acknowledgement to an internal file and then processes it. If you need the system to process acknowledgements differently, you should select an additional translation object from the Acknowledge list. **Important:** We strongly recommend that you do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason for doing so.

Part	Function
Envelope	Accesses one of the following Outbound Interchange Envelope dialog boxes 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 • Outbound Envelope PIP Initiation

Creating a Partner Definition

The partner definition contains the basic information about the trading 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 transactions are processed using the file Import facility.

About this task

To create a partner definition, complete the following steps:

Procedure

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

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

   The system displays the Partner Definition (New/Edit) Dialog Box.
3. In the Profile ID box, type a unique alphanumeric Profile ID for this partner.

   Note: Do not use special characters.
4. In the Name box, type the partner name.
5. In the EDI Code box, type the EDI identifier for this partner.

   Note: The system uses this identifier during inbound processing to select the correct partner.
6. If necessary, in the Application Code box, type an application code to identify this partner.

   Note: The system uses this identifier during outbound import processing, to select the correct partner.

7. Select the appropriate mailbox from the Default Mailbox list or click **New Mailbox** to create a new mailbox.

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

8. After you enter all the partner definition information, click **Save**.

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

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

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

About 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 documents 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 received
- The criteria the system uses to validate the information it receives
- The functional groups and interchanges in which you expect to receive the documents

Translation Objects

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

Note: If this relationship requires a new translation object, you must register that translation object with the system before creating the inbound relationship. See Registering New Translation Objects for instructions.

Inbound Groups and Interchanges

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

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

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

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

Process for Creating an Inbound Relationship

The following describes the process for defining an inbound relationship:

Stage	Description
1	Create a new inbound relationship.
2	Create and register the inbound translation object to be used with this relationship. See the *IBM Sterling Gentran:Server for Microsoft Windows Application Integration User Guide* for more information about creating a translation object. Also see Registering New Translation Objects for more information.
3	Select at least one inbound translation object.
4	Create and select at least one inbound group to define how the document is received from this partner. **Note:** Depending on the standards you are using, either the functional group or interchange may be optional.
5	Create and select at least one inbound interchange to define how the document is received from this partner. **Note:** Depending on the standards you are using, either the functional group or interchange may be optional.
6	If you are generating functional acknowledgements as a result of receiving documents for an inbound relationship, you must set up the corresponding outbound relationship to generate the acknowledgements your partner requests. See Creating an Outbound Relationship for more information.

Creating an Inbound Relationship
Before you begin

Before setting up an inbound relationship, you must know the following information to plan the implementation of this partner:
- The EDI standard you expect from this trading partner (such as ANSI)
- The standard version you expect from this trading partner (such as 003020 for ANSI or 090001 for EDIFACT)
- The code for the transaction set you expect from this trading partner (such as INVOIC for an EDIFACT invoice)

- The type of functional group and interchange the transaction set is wrapped in when it is received from this partner

The information required for this task should be provided to you by your trading partner when this partner defines the details of the transactions they send you.

About this task

To create an inbound relationship, complete the following steps.

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**.

   The system displays the Inbound Relationship Dialog Box.

   Note: You must have already created a partner definition for this partner.
3. Click **New**.

   The system displays the New Inbound Relationship dialog box.
4. In the description box, type a unique relationship name.
5. Click **Save**.

   The system creates an inbound relationship and returns to the Inbound Relationship dialog box.
6. Select values for the following:
   - Standard
   - Version
   - Transaction Set
   - Release (for TRADACOMS only)
7. If you need to define parameters to comply with the processing needs of your partner (such as Sequence Checking, Last Used Control, Duplicate Documents, or Generate Acknowledgement), click **Advanced**.

   Important: Do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason to do so.
8. You now need to select an inbound translation object for this partner. Do the following:
   a. On the Inbound Relationship dialog box, click **Translation**.

      The system displays the Inbound Translation Object Dialog Box.
   b. Select the translation objects required for this inbound relationship.
   c. 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.
   d. To use the Export to Mailbox function to specify a mailbox and E-mail address so the output of the inbound translation object can be delivered directly back to the Mailbox Server Manager, select Export to Mailbox and complete the appropriate boxes.
   e. Click **Save** to save your selections and return to the Inbound Relationship dialog box.

9. You now need to select an inbound functional group. Do the following:

   a. On the Inbound Relationship dialog box, click **Groups** to display a list of existing groups.

      The system displays the Inbound Group Select Dialog Box.

   b. Do one of the following:

      - If you are not using groups, select **<none>** and click **Select**. Continue with Step 10.

      - If the required group is in the Groups list, select the group. Continue with Step 10.

      - If the required group is not in the list, you will need to create it. Continue with step c.

   c. On the Inbound Group Select dialog box, click **New**.

      The system displays the Inbound Group Entry Dialog Box.

   d. In the Description box, type the group description.

   e. In the Functional Group ID box, type the identification of the functional group you are specifying.

   f. If you have more complex requirements for processing the functional group, click **Advanced** to display the full list of functional group setup options.

      Important: Do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason to do so.

   g. After you set up the required parameters in this dialog box, click **Save** to store the information and return to the Inbound Group Select dialog box.

   h. Highlight the new group and click **Select**.

      The system selects the group and returns to the Inbound Relationship dialog box.

10. You now need to select an inbound interchange. Do the following:

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

       The system displays the Inbound Interchange Select Dialog Box.

    b. Do one of the following:

       - If you are not using groups, select **<none>** and click **Select**. Continue with Step 11.

       - If the required interchange is in the Interchanges list, select the interchange. Continue with Step 11.

       - If the required interchange is not in the list, you will need to create it. Continue with step c.

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

       The system displays the Inbound Interchange Entry Dialog Box.

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

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

    f. If you have more complex requirements for processing the interchange, click **Advanced** to display the full list of interchange setup options.

Important: Do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason to do so.

   g. After you set up the required parameters in this dialog box, click Save to store the information and return to the Inbound Interchange Select dialog box.

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

       The system selects the interchange and returns to the Inbound Relationship dialog box.

11. On the Inbound Relationship dialog box, click **Save** to save the inbound relationship.

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

About 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 document, and how that business document 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 functional group and interchange envelopes in preparation for sending

Translation Objects

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

Note: If this relationship requires a new translation object, you must register that translation object with the system before creating the outbound relationship. See Registering New Translation Objects for instructions.

Outbound Groups and Interchanges

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

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

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

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

Process for Creating an Outbound Relationship

The following describes the process of defining an outbound relationship.

Stage	Description
1	Create a new outbound relationship.
2	If you are using the EDIFACT, ODETTE, or TRADACOMS standard, you must complete the envelope (header) information for this type of document. For the ANSI, UCS, and TDCC standards, the envelope information is optional.
3	Create and register the inbound translation object to be used with this relationship. See the *IBM Sterling Gentran:Server for Microsoft Windows Application Integration User Guide* for more information about creating a translation object. Also see Registering New Translation Objects for more information.
4	Select at least one outbound translation object.
5	Create and select at least one outbound group (including enveloping information) to define how the document is received from this partner. **Note:** Depending on the standards you are using, either the functional group or interchange may be optional.
6	Create and select at least one outbound interchange (including enveloping information) to define how the document is received from this partner. **Note:** Depending on the standards you are using, either the functional group or interchange may be optional.
7	If you will receive functional acknowledgements for the outbound documents, set up the corresponding inbound relationship to receive the acknowledgements you expect from your partner.

Creating an Outbound Relationship
Before you begin

Before setting up an outbound relationship, you must know the following information to plan the implementation of this partner:
- The EDI standard this trading partner expects (such as ANSI X12)
- The standard version that this partner expects (such as 003020 for ANSI or 090001 for EDIFACT)

- The code for the transaction set you use (such as "INVOIC" for an EDIFACT invoice)
- The type of functional group and interchange envelope the transaction set is wrapped in when it is sent to this partner

The information required for this task should be provided to you by your trading partner when this partner defines the details of the transactions they send you.

About this task

To create an outbound relationship, complete the following steps.

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**.

   The system displays the Outbound Relationship Dialog Box.

   Note: You must have already created a partner definition for this partner.
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 an outbound relationship and returns to the Outbound Relationship dialog box.
6. Select values for the following:
   - Standard
   - Version
   - Transaction Set
   - Release (for TRADACOMS only)
7. If you need to define parameters to comply with the processing needs of your partner (such as Last Used Control Number, Expect Acknowledgement, Hours Overdue, Duplicate Documents, or Test Indicator), click **Advanced**.

   The system displays the Advanced fields on the Outbound Relationship dialog box.
8. If you are using the EDIFACT, ODETTE, or TRADACOMS standard, you must select a transaction envelope. For the ANSI, UCS, and TDCC standards, the envelope information is optional. Do the following:
   a. Click **Envelope** to complete the envelope (header) information.

      The system displays an outbound envelope dialog box.
   b. Enter the appropriate information and click **Save**.

      Saves the information and returns to the Outbound Relationship dialog box.
9. You now need to select an outbound translation object for this partner. Do the following:
   a. On the Outbound Relationship dialog box, click **Translation**.

      The system displays the Outbound Translation Object Dialog Box.
   b. Select the translation objects required for this outbound relationship.

c. If you selected an Import translation object, you may need to define the following:

- In the Application ID box, type the application identifier that indicates the destination for the documents.

- In the Application Alias Value box, type criteria that the system will use to distinguish this relationship from others during the application import function.

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

10. You now need to select an outbound functional group for this partner. Do the following:

a. On the Outbound Relationship dialog box, click **Groups** to display a list of existing groups.

The system displays the Outbound Group Select Dialog Box.

b. Do one of the following:

- If you are not using groups, select **<none>** and click **Select**. Continue with Step 11.

- If the required group is in the Groups list, select the group. Continue with Step 11.

- If the required group is not in the list, you will need to create it. Continue with step c.

c. On the Outbound Group Select dialog box, click **New**.

The system displays the Outbound Group Entry Dialog Box.

d. In the Description box, type the group description.

e. In the Functional Group ID box, type the identification of the functional group.

f. If you have more complex requirements for processing the functional group, click **Advanced**.

Important: Do not change the translation objects in the Group Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason to do so.

g. Click **Envelope** to set up the parameters for the generation of the Functional Group segment.

An outbound functional group dialog box is displayed.

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

i. Click **Save** to store the information about the Outbound Group Entry dialog box and return to the Outbound Group Select dialog box.

j. Highlight the new group and click **Select**.

Selects the group and returns to the Outbound Relationship dialog box.

11. You now need to select an outbound interchange. Do the following:

a. On the Outbound Relationship dialog box, click **Interchanges**.

The system displays the Outbound Interchange Select Dialog Box.

b. Do one of the following:

- If you are not using groups, select **<none>** and click **Select**. Continue with Step 12.

- If the required interchange is in the Interchanges list, select the interchange. Continue with Step 12.
- If the required interchange is not in the list, you will need to create it. Continue with step c.

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

   The system displays the Outbound Interchange Entry Dialog Box.

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

e. In the Interchange ID box, type the identification of the interchange.

f. If you have more complex requirements for processing the interchange, click **Advanced**.

   Important: Do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you have a specific reason to do so.

g. If you do not want to use the default Mailbox and E-mail Address, select the appropriate mailbox from the Default Mailbox list or click **New Mailbox** to create a new mailbox.

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

   An outbound interchange dialog box is displayed.

i. 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.

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

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

   Selects the interchange and returns to the Outbound Relationship dialog box.

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

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

Editing a Partner Profile
About this task

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

To edit a partner profile, complete the following steps.

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.

3. Click **Edit**.

The system displays the Partner Definition (New/Edit) Dialog Box for that partner.

4. Make the necessary changes.

5. Click **Save**.

The system returns to the Partner Editor dialog box.

Deleting a Partner Profile

About this task

Important:

- When you delete a partner relationship, the documents and interchanges associated with that partner are also deleted.
- If any documents or interchanges exist for a partner you choose to delete, you are warned before the actual deletion.

To delete a partner profile, complete the following steps.

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.

3. Click **Delete**.

   You are prompted to confirm the deletion.

4. Click **Yes** to delete the selected partner profile.

   The partner profile and all associated records are deleted.

Routing Partner Profiles

Partner Copy Dialog Box

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

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

The following illustrates the Partner Copy dialog box:

The following describes the parts of the Partner Copy dialog box.

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

Part	Function
Interchange Receiver Qualifier	Specify your partner's Qualifier as it will appear on the interchange header. Qualifiers are predefined by the EDI standards. The value can be up to four characters. **Note:** If the partner profile uses the ANSI, EDIFACT, ODETTE, UCS, or TDCC standard, you must complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.
Interchange Receiver ID	Specify your partner's Interchange ID. The value can be up to 15 characters. **Note:** If the partner profile uses the ANSI, EDIFACT, ODETTE, UCS, or TDCC standard, you must complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.
Interchange Communication ID	Specify your BG communication identifier. This ID will appear on the BG Interchange Header. **Note:** If the partner profile uses the UCS standard, you must complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.
Interchange Password	Specify a password that is agreed upon by you and your trading partner. This password will appear on the BG Interchange Header. **Note:** If the partner profile uses the UCS standard, you must complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information.
Recipient Code	Specify the code agreed on by you and your partner. **Notes:** • If the partner profile uses the TRADACOMS standard, you must complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information. • The Recipient Code is mandatory if you do not complete the Recipient Name box.
Recipient Name	Specify your partner's name. **Notes:** • If the partner profile uses the TRADACOMS standard, you must complete this box. If you do not complete this box, the system uses the value from the copied partner profile's envelope information. • The Recipient Name is mandatory if you do not complete the Recipient Code box.
Receiver DUNS+4	Mandatory. Specify the DUNS number of your partner.

Importing Partner Profiles

Partner profiles may become complex and may require you to define a significant number of parameters. To simplify this process, Sterling Gentran:Server includes the import partner feature, which enables you to import partner details from a file.

Before you begin

You must create a mailbox for the partner prior to loading the partner profile. See the *IBM Sterling Gentran:Server for Microsoft Windows Communications Guide* for more information.

About this task

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

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

See the *IBM Sterling Gentran:Server for Microsoft Windows Administration Guide* for more information about partner file layouts.

To import a partner profile, complete the following steps:

Procedure

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

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

   The system displays the Import File Select Dialog Box.
3. Navigate to the folder and enter or select the name of the partner file.
4. Click **Open**.

   The system displays the Import dialog box.

   Note: This dialog box allows you verify this partner is the correct one.
5. Click **Save** to continue.
6. If you are prompted to enter additional partner information, enter that information and click **Save**.

   The system imports the partner details (if they do not already exist on the system) and any relationships for which there are translation objects. During this process, the system prompts you for any additional information it needs by displaying the appropriate Partner Editor dialog box. You are prompted with dialog boxes when you would normally be required to provide information about your site. This is usually restricted to your EDI identifiers, which the system uses to generate outbound EDI envelopes. The system continues displaying Partner Editor dialog boxes until it has all the information it needs.

   When the import is complete, the system displays the following message:

   `Import process completed. Please note any warnings or errors.`
7. Click **OK** to return to the Import dialog box.
8. Click **Exit** to return to the Partner Editor dialog box.

Exporting Partner Profiles

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

About this task

Note: Any tables (cross-reference, lookup, or location) attached to the partner profile are also exported. See the Partner File Layouts appendix in the *IBM Sterling Gentran:Server for Microsoft Windows Administration Guide* for more information.

To export a partner profile, complete the following steps:

Procedure

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

   The system displays the Partner Editor Dialog Box.

2. Select a partner.

3. Click **Export**.

   The system displays the Export File Build Dialog Box.

4. Navigate to the correct folder and enter a name for the export file.

   Note: The system automatically prompts you to name the export file with the name of the partner and the .par extension.

5. Click **Save** to export the partner.

Copying Partner Profiles

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

About this task

The partner copy function provides a quick method for establishing partners that have similar or identical trading relationships.

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

To copy a partner profile, complete the following steps.

Procedure

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

   The system displays the Partner Editor Dialog Box.

2. Click **Copy**.

   The system displays the Partner Copy Dialog Box.

3. Click **Select Partner**.

   The system displays the Import File Select Dialog Box.

4. Navigate to the folder and select the file you want to copy.

5. Click **Open** to copy that partner.

   Note: The system displays the model partner profile name in the title bar of the Partner Copy dialog box. The default file extension for exported partners is .par.

6. On the Partner Copy dialog box, do the following:

   a. Type a unique profile identifier in the Profile ID box.

   b. Type the partner name.

   c. Type the EDI identifier for this partner.

      Note: The system uses this identifier during inbound processing to select the correct partner.

   d. 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.

    e. elect the appropriate mailbox from the Default Mailbox list.

7. Complete the appropriate boxes in the enveloping section of the dialog box.

    Notes:

- You should only complete those boxes that are necessary for the standard that the copied partner profile uses. The standards are listed to the right of each box.
- If the partner profile you copied uses a standard, you must complete all the necessary enveloping boxes for that standard. If you do not complete the necessary boxes for the standard, the system takes the necessary information from the copied partner profile envelope.

    For example: If the copied partner profile uses the UCS standard, you must complete the Interchange Communication ID box, among others.

8. After you enter all the partner information, click **Save**.

    The system displays the Outbound Interchange Entry Dialog Box.

9. To change the default mailbox, select the appropriate mailbox from the Default Mailbox list or click **New Mailbox** and create a new mailbox.

10. Click **Save**.

    The system completes the partner copy operation, displays a completion message.

11. Click **OK**.

    The system returns to the Partner Copy dialog box.

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

Chapter 4. Partner Tables

About Partner Tables

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

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

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

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

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

Notes:

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

Partner Tables Dialog Box

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

The following illustrates the Partner Tables dialog box:
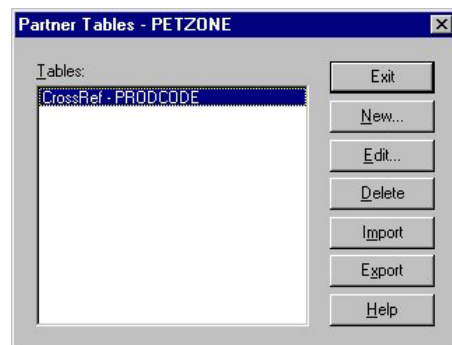
The following describes the parts of the Partner Tables dialog box.

Part	Function
Tables	Displays all currently defined partner tables.

Part	Function
New	Opens the New Table dialog box, which allows you to create a new table.
Delete	Removed the partner table from the system.
Edit	Opens either the CrossRef Select dialog box or the Lookup Select dialog box, which allows you to edit the selected table.
Import	Opens the Table Import File Select dialog box, which enables you to import a partner table.
Export	Opens the Table Export File Build dialog box, which enables you to export a partner table.

New Table Dialog Box

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

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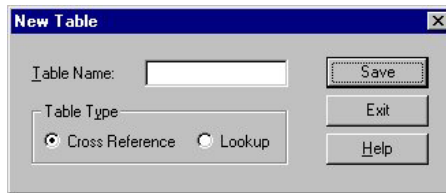
The following lists the parts of the New Tables dialog box and their functions:

Part	Function
Table Name	Specify the name of the table. **Notes:** • The table name must be the same as the name used in the translation object that requires the table. If your database is case-sensitive, when you reference the table using standard or extended rules, you must type the exact name of the table (including case). • See the *IBM Sterling Gentran:Server for Microsoft Windows Application Integration User Guide* for more information about standard and extended rules.
Table Type	Specify the type of table. Valid values: • Cross-Reference - Used to convert your values to your trading partner's values during outbound processing, and to convert your trading partner's values to your values during inbound processing. • Lookup - Used to find values in inbound or outbound data.

CrossRef Select Dialog Box

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

The following illustrates the CrossRef Select dialog box:
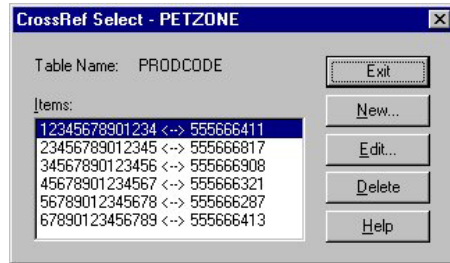
The following describes the parts of the CrossRef Select dialog box.

Part	Function
Table Name	Displays the name of the cross-reference table.
Items	Displays a list of table items.
New	Opens the CrossRef Entry Dialog Box, which allows you to create a new table.
Edit	Opens the CrossRef Entry Dialog Box, which allows you to edit the selected table item.

CrossRef Entry Dialog Box

The CrossRef Entry dialog box enables you to create a new table item and edit existing table items.

The following illustrates the CrossRef Entry dialog box:
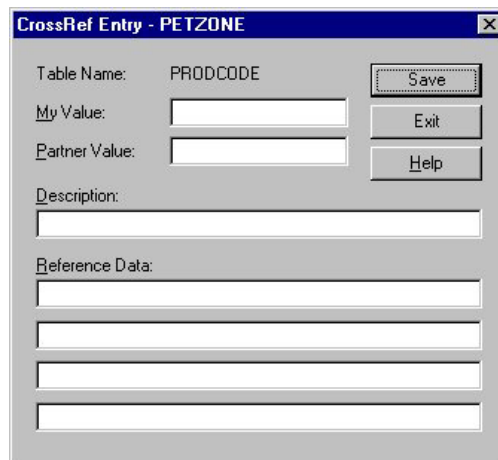
The following describes the parts of the CrossRef Entry dialog box.

Part	Function
Table Name	Displays the name of the Cross-reference table.
My Value	Specify your data value that corresponds to your partner's data value.

Part	Function
Partner Value	Specify your partner's data value that corresponds to your data value.
Description	Specify a description of the codes.
Reference Data	Specify up to four values that can be mapped when they are associated with a specific code value. **Note:** These boxes are not currently used by Sterling Gentran:Server.

Lookup Select Dialog Box

The Lookup Select dialog box contains all lookup partner tables.

The following illustrates the Lookup Select dialog box.
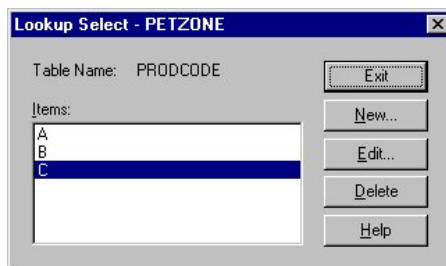
The following describes the parts of the Lookup Select dialog box.

Part	Function
Table Name	Displays the name of the Lookup table.
Items	Displays a list of table items.
New	Opens the Lookup Entry dialog box, which allows you to create a new table item.
Edit	Opens the Lookup Entry dialog box, which allows you to edit the selected table item.

Lookup Entry Dialog Box

The Lookup Entry dialog box enables you to create a new table item and edit existing table items.

The following illustrates the Lookup Entry dialog box:

The following describes the parts of the Lookup Entry dialog box.

Part	Function
Table Name	Displays the name of the Lookup table.
Lookup Value	Specify the value that will be looked up in the data during inbound or outbound processing.
Description	Specify a description of the code.
Reference Data	Specify up to four values that can be mapped when they are associated with a specific code value. **Note:** These boxes are not currently used by Sterling Gentran:Server.

Creating Partner Tables

About this task

To create a partner table, complete the following steps:

Procedure

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

   The system displays the Partner Editor Dialog Box.

2. Select the partner profile or the system partner (Internal System User) for which you want to create a Cross-reference or Lookup table and click **Tables**.

   The system displays the Partner Tables Dialog Box.

3. Click **New**.

   The system displays the New Table Dialog Box.

4. In the Table Name box, type the unique table name.

   Note: The table name must be the same as the name used in the translation object that requires the table. If your database is case-sensitive, when you reference the table using standard or extended rules, you must type the exact name of the table (including case).

5. In the Table Type section, select **Cross-reference** or **Lookup**.

6. Click **Save**.

7. Click **New**.

Displays either the CrossRef Entry Dialog Box or Lookup Entry Dialog Box depending on which type of table you selected.

8. Enter the following, depending on which table type you selected:
   - For a cross-reference table, enter your data value and your partner's data value.
   - For a lookup table, enter the lookup value.

   Note: How your data is used depends on how the translation object is defined. Consult with the translation object designer if you are unclear about what is required.

9. Enter a description for that record.
10. Click **Save** after each entry to save the information and enter another table record.
11. Once you finish typing all entries, click **Exit**.
12. Click **Exit** to return to the Partner Editor dialog box.

Editing Partner Tables

About this task

To edit a partner table, complete the following steps:

Procedure

1. Select **Tool > Partner Editor**.

   The system displays the Partner Editor Dialog Box.
2. Select the partner profile or the system partner (Internal System User) for which you want to modify a Cross-reference or Lookup table and click **Tables**.

   The system displays the Partner Tables Dialog Box.
3. Select the table you want to modify and click **Edit**.

   The system displays either the CrossRef Select Dialog Box or Lookup Select Dialog Box depending on the type of table.
4. Select the item you want to modify and click **Edit**.

   The system displays either the CrossRef Entry Dialog Box or Lookup Entry Dialog Box depending on the type of table.
5. Modify the entry.
6. After you finish modifying all necessary table entries, click **Save**.
7. Click **Exit**.

   The system returns to the Partner Editor dialog box.

Deleting Entries in a Partner Table

About this task

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

Procedure

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

   The system displays the Partner Editor Dialog Box.
2. Select the partner profile or the system partner (Internal System User) for which you want to delete a table entry and click **Tables**.

The system displays the Partner Tables Dialog Box.

3. Select the table you want to modify and click **Edit**.

   The system displays either the CrossRef Select Dialog Box or Lookup Select Dialog Box depending on the type of table.

4. Select the item you want and click **Delete**.

5. Click **Yes** to confirm the deletion.

6. Click **Exit**.

   The system returns to the Partner Editor dialog box.

Deleting Partner Tables

About this task

To delete a partner table, complete the following steps:

Procedure

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

   The system displays the Partner Editor Dialog Box.

2. Select the partner profile for which you want to delete a table and click **Tables**.

   The system displays the Partner Tables Dialog Box

3. Select the table and click **Delete**.

4. Click **Yes** to confirm the deletion.

   The system returns to the Partner Editor dialog box.

Partner Table Fields

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

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

The export file layout is a free-format ASCII text file. Each field must be delimited (separated) with Hex01 because the field lengths are variable.

Note: You can create the file with a text editor (such as Notepad). The default file extension for a lookup export file is .lkp. The default file extension for a cross-reference file is .xrf.

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

Field	Description
PartnerKEY*	Unique identifier for the partner
TableCode	For lookup, this value is "L".
TableName*	Descriptive name for the table
	This value is displayed in the table selection list.

Field	Description
Item*	Value that is looked up in the data during inbound or outbound processing
Description	Brief comment about the item
Text1, Text2, Text3, Text4	Additional reference information as required by the translation object using this table

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

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

Exporting a Partner Table

About this task

To export a partner table, complete the following steps:

Procedure

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

   The system displays the Partner Editor Dialog Box.
2. Select the partner profile or the system partner (Internal System User) for which you want to export a Cross-reference or Lookup table and click **Tables**.

   The system displays the Partner Tables Dialog Box.
3. Click **Export**.

   The system displays the Table Export File Build Dialog Box.
4. Navigate to the location of the exported table file and enter or select the name of the file.

   Notes:
   - You can only export Sterling Gentran:Server partner tables.
   - The default file extension for cross-reference tables is .xrf. The default file extension for lookup tables is .lkp.
5. Click **Save** to begin the export process.

   When the export process is complete, the system displays an informational dialog box.
6. Click **OK**.

   The system returns to the Partner Tables dialog box.

7. Click **Exit**.

   The system returns to the Partner Editor dialog box.

Importing Partner Tables

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

About this task

To import a partner table, complete the following steps:

Procedure

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

   The system displays the Partner Editor Dialog Box.
2. Select the partner profile or the system partner (Internal System User) for which you want to import a Cross-reference or Lookup table and click **Tables**.

   The system displays the Partner Tables Dialog Box.
3. Click **Import**.

   The system displays the Table Import File Select Dialog Box.
4. Navigate to the location of the table file and select or enter the name of the file.

   Notes:
   - You can only import Sterling Gentran:Server partner tables.
   - The default file extension for cross-reference tables is .xrf. The default file extension for lookup tables is .lkp.
5. Click **Open** to begin the import process.

   When the export process is complete the system displays an informational dialog box.
6. Click **OK**.

   The system returns to the Partner Tables dialog box.
7. Click **Exit**.

   The system returns to the Partner Editor dialog box.

Chapter 5. Partner Locations

About Partner Locations

Each partner profile may have many associated location tables. The location tables may contain address- and contact-related information about the partner.

You can use location tables in many different ways. Locations are referenced in translation objects through one of the location keys (reference codes). Locations are used only if you use a translation object that specifically accesses those locations.

For example: You may need a list of a partner's store addresses, warehouse addresses, or "invoice to" addresses. Any or all of these can be stored in a location table.

You must set up two parameters that contain the following information:
- The name of the trading partner location
- The reference codes that the system uses to identify this location

These parameters are used to create a partner location.

Before setting up a partner location, you must know the following information to plan the implementation of this partner:
- The unique name that identifies this partner location
- At least one reference code to identify the location

Location Select Dialog Box

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

The following illustrates the Location Select dialog box:
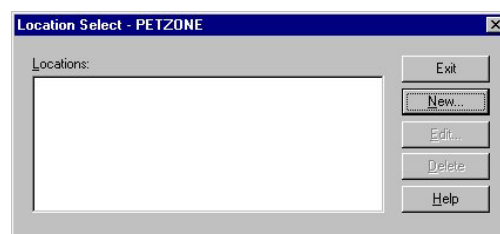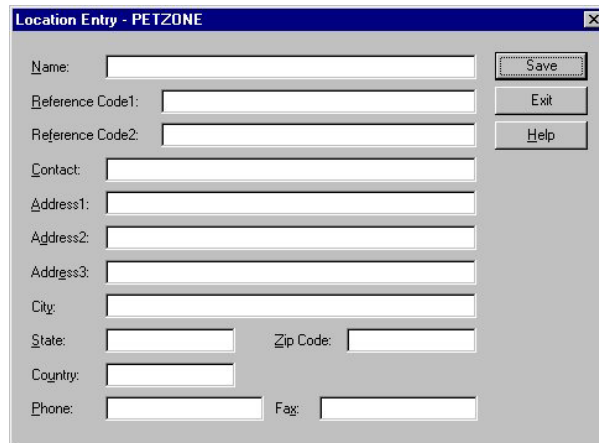
The following describes the parts of the Location Select dialog box.

Part	Function
Locations	Displays all defined locations.
New	Opens the Location Entry dialog box, which allows you to create a new location.
Edit	Opens the Location Entry dialog box, which allows you to edit the selected location.

Location Entry Dialog Box

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

The following illustrates the Location Entry dialog box:

The following describes the parts of the Location Entry dialog box.

Part	Function
Name	Specify the name of this trading partner location. This name should accurately describe the location because this box will be displayed in the location selection list. **Note:** This box is mandatory.
Reference Code1	Specify a reference code to identify the location being defined (such as a DUNS number). **Note:** This box is mandatory.
Reference Code2	Specify a reference code to identify the location being defined (such as a DUNS number).
Contact	Specify the name of a personal contact.
Address1, Address2, Address3	Specify the partner's business address.
City	Specify the partner's city.
State	Specify the partner's state.
Zip Code	Specify the partner's zip or postal code.
Country	Specify the partner's country.
Phone	Specify the partner's phone number.
Fax	Specify the partner's fax number.

Creating Partner Locations

About this task

To create partner locations, complete the following steps:

Procedure

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

   The system displays the Partner Editor Dialog Box.

2. Select the partner profile or the system partner (Internal System User) for which you want to create a location and click **Locations**.

   The system displays the Location Select Dialog Box.
3. Click **New**.

   The system displays the Location Entry Dialog Box.
4. In the Name box, type a unique identifier that defines this location within the partner.
5. In the Reference Code 1 box, type the unique identifier for the location you are defining.

   Example - The DUNS number for the location.
6. Complete the remaining boxes, as necessary.

   Note: If you use Reference Code 2, it must be unique.
7. Click **Save**.

   The system saves the location information and displays a blank Location Entry dialog box.
8. If you want to enter additional locations for this partner, repeat steps 4 through 7 as many times as necessary.
9. Click **Exit**.

   The system returns to the Partner Editor dialog box.

Editing Partner Locations

About this task

To edit a partner location, complete the following steps:

Procedure

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

   The system displays the Partner Editor Dialog Box.
2. Select the partner profile or the system partner (Internal System User) for which you want to create a location and click **Locations**.

   The system displays the Location Select Dialog Box.
3. From the Locations list, select a location and click **Edit**.

   The system displays the Location Entry Dialog Box.
4. Make any necessary changes.

   Note: The Reference Code1 box must be completed.
5. Click **Save** to save the location information and return to the Location Select dialog box.
6. Click **Exit**.

   The system returns to the Partner Editor dialog box.

Delete Partner Locations

About this task

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

Procedure

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

   The system displays the Partner Editor Dialog Box.

2. Select the partner profile or the system partner (Internal System User) for which you want to create a location and click **Locations**.

   The system displays the Location Select Dialog Box.

3. From the Locations list, select a location and click **Delete**.

   The system displays the Delete Confirmation dialog box.

4. Click **Yes** to confirm the deletion.

5. Click **Exit**.

   The system returns to the Partner Editor dialog box.

Chapter 6. The Document Editor

About the Document Editor

The Document Editor is a data entry tool that allows you to create, modify, and view documents.

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

EDI Documents

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

Document Browsers

About Document Browsers

You can access document browsers in Sterling Gentran:Server through the Desk, the Main Toolbar, and the View menu.

If you select the In Documents, ?In Documents, Out Documents, ?Out Documents, In Drawer, or Out Drawer browser, the system displays the appropriate summary dialog box for that browser.

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

The following lists the columns displayed in all browsers:

Part	Function
Partner	Identifies the trading partner.
Type	Identifies the specific type of EDI document. For example: 810 identifies an invoice.
Name	Displays the user-assigned name of the document.
Status	The allowable status depends on the browser.
RefData	Displays the reference data assigned by the translation object designer to identify this document: • Segment/element positional value (such as a PO Number for a purchase order) • Blank (no reference data is assigned)

Part	Function
Processed Time	The date and time the document was processed by the system. Format used is specified in your server system settings.

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

Setting Browser Preferences

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

About this task

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

Procedure

1. From the appropriate area of The Desk, select **Options > Browser Views**.

   The system displays the dialog box.

2. To reset the default view, deselect the **Save All Browser Positions and Sizes** check box.

3. Click **OK**.

   The system displays the browser containing those documents.

In Documents Browser

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

The following illustrates the In Documents browser:
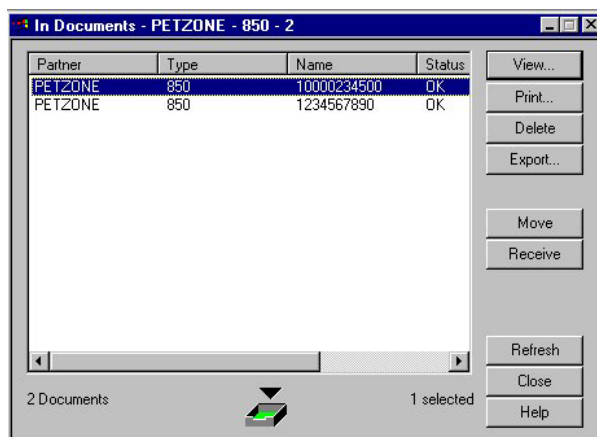
The following describes the parts of the In Documents browser.

Part	Function
Partner	Name of the partner from whom the document was received.
Type	Type of document that was received.

Part	Function
Name	Name of the received document.
Status	Status of the received document.
Processed Time	The date and time the document was processed by the system. Format used is specified in your server system settings.
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document. **Note:** If a document is waiting for acknowledgement processing (acknowledgement generation or reconciliation), you may not delete it until this processing is complete.
Export	Accesses the Select Export Method Dialog Box, which allows you to export the selected document
Move	Moves the selected document to the In Drawer.

?In Documents Browser

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

The following illustrates the ?In Documents browser:

The following describes the parts of the ?In Documents browser.

Part	Function
Partner	Name of the partner from whom the document was received.
Type	Type of document that was received.
Name	Name of the received document.
Status	Status of the received document.
Processed Time	The date and time the document was processed by the system. Format used is specified in your server system settings.
View	Accesses the View Choice Dialog Box, which allows you view the selected document.

Part	Function
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document. **Note:** If a document is waiting for acknowledgement processing (acknowledgement generation or reconciliation), you may not delete it until this processing is complete.
Export	Accesses the Select Export Method Dialog Box, which allows you to export the selected document
Move	Moves the selected document to the In Drawer.

In Drawer Browser

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

The following illustrates the In Drawer browser:

The following describes the parts of the In Drawer browser.

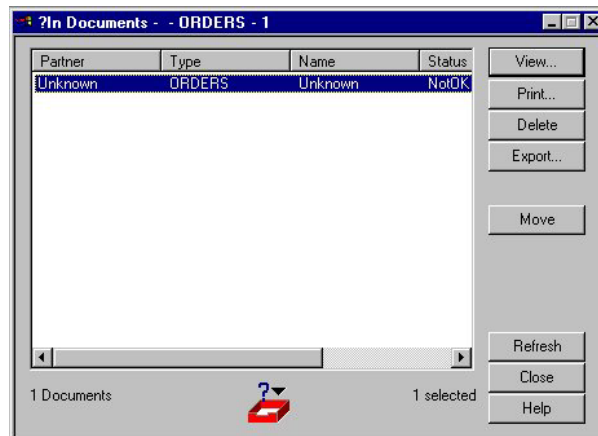| Part	Function
Partner	Name of the partner from whom the document was received.
Type	Type of document that was received.
Name	Name of the received document.
Status	Status of the received document.
Processed Time	The date and time the document was processed by the system. Format used is specified in your server system settings.
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Accesses the Select Export Method Dialog Box, which allows you to export the selected document.

Part	Function
Respond	Creates a turnaround document in response to the selected document or documents. **Note:** The Respond function is only valid when one or more documents are selected and Turn Around translation objects exist for the selected documents.

Workspace Browser

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

The following illustrates the Workspace browser:
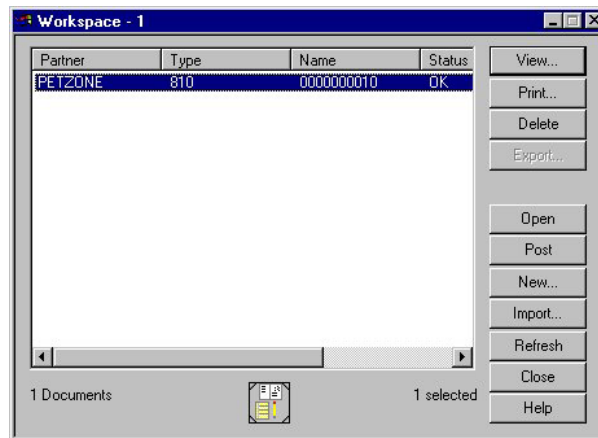
The following describes the parts of the Workspace browser.
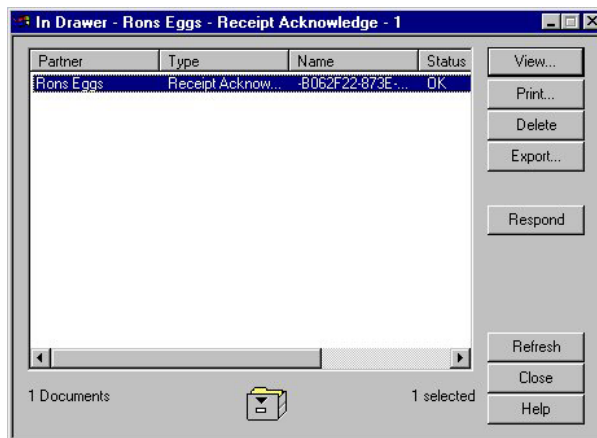
Part	Function
Partner	Name of the partner from whom the document was received.
Type	Type of document that was received.
Name	Name of the received document.
Status	Status of the received document.
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Not a valid function for this browser.
Open	Accesses the Document Editor facility, which allows you to edit the selected document.
Post	Moves the selected compliant document to the Out Documents Browser. **Note:** Post documents to the Out Documents before sending them.

Part	Function
New	Accesses the Create New Document dialog box, which allows you to select a partner/transaction set combination for which you want to enter a new document using the Document Editor facility. **Note:** The Document Editor uses the associated screen entry translation object to allow information to be entered into the system.
Import	Accesses the Application Files to Import Dialog Box, which allows you to import data from an external application file. **Note:** Depending on the content of the file, the system may prompt you for partner, transaction, or translation object information. The Import function does not affect any selected documents.

Out Documents Browser

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

The following illustrates the Out Documents browser:

The following describes the parts of the Out Documents browser.

Part	Function
Partner	Name of the partner for whom the document is to be sent.
Type	Type of document that is to be sent.
Name	Name of the document.
Status	Status of the document.
Processed Time	The date and time the document was processed by the system. Format used is specified in your server system settings.
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Not a valid function from this browser.

Part	Function
Send	Accesses the Send/Receive dialog box, which enables you to manually start a communications session to send data. **Notes:** • Only selected documents will be enveloped and sent. If no documents are selected then all documents will be sent. Successfully sent documents will be moved to the Out Drawer. • Initiating a Send session also prompts the system to receive any documents that are waiting to be received. • The Send function is only valid if Out Documents is the currently selected browser and documents are present or if interchanges in the Interchanges browser have a Ready status.
UnPost	Moves the selected document back to the Workspace browser.

?Out Documents Browser

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

The following illustrates the ?Out Documents browser:

The following describes the parts of the ?Out Documents browser.

Part	Function
Partner	Name of the partner associated with the document.
Type	Type of document.
Name	Name of the document.
Status	Status of the document.
Processed Time	The date and time the document was processed by the system. Format used is specified in your server system settings.
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Not a valid function from this browser.
Move	Moves the selected document to the In Drawer.

Out Drawer Browser

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

The following illustrates the Out Drawer browser:

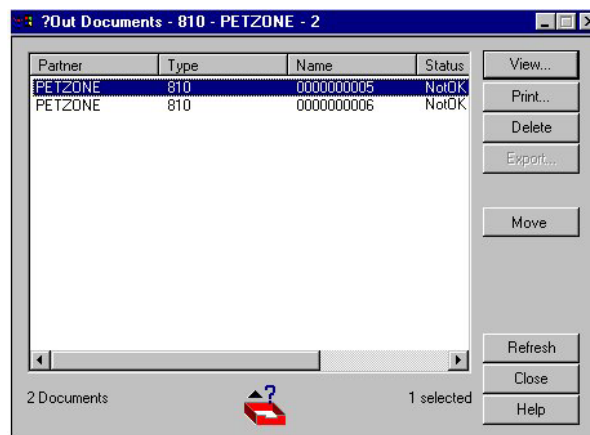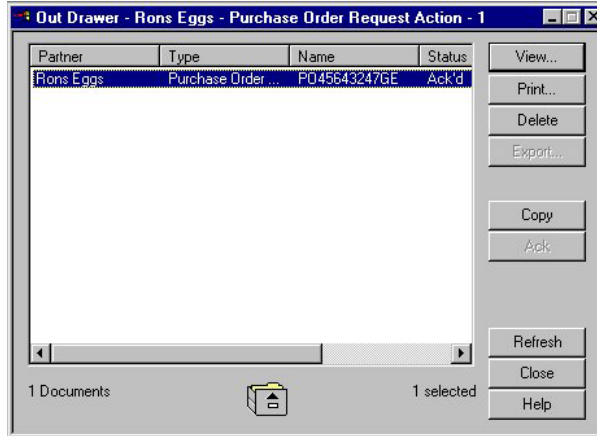The following describes the parts of the Out Drawer browser.

Part	Function
Partner	Name of the partner for whom the document is to be sent.
Type	Type of document that is to be sent.
Name	Name of the sent document.
Status	Status of the sent document.
Processed Time	The date and time the document was processed by the system. Format used is specified in your server system settings.
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.
Delete	Deletes the selected document.
Export	Not a valid function from this browser.
Copy	Copies the selected documents to the Workspace. **Note:** This function enables you to reprocess and resend documents that were already sent by the system.
Ack	Changes the status of the selected documents to Acknowledged.

Processing Browser

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

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

The following illustrates the Processing browser:
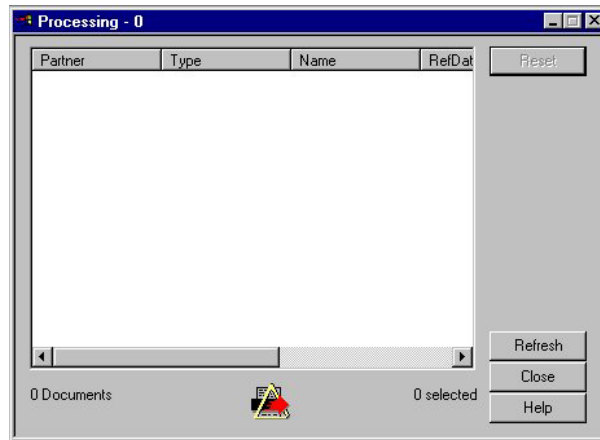
The following describes the parts of the Processing browser.

Part	Function
Partner	Name of the partner associated with the document.
Type	Type of document being processed.
Name	Name of the document.
Status	Status of the document.
Reset	Returns to their previous location any documents that are displayed on this dialog box but for which processing has terminated. **Note:** This function is typically used for exception cases when the processing of a document terminated improperly.

Related Dialog Boxes

View Choice Dialog Box

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

The following illustrates the View Choice dialog box:
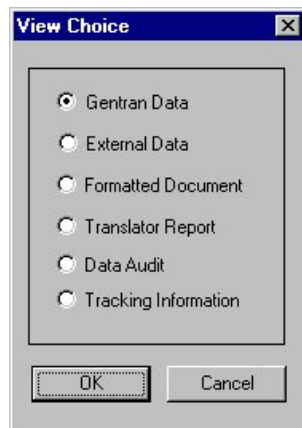
The following describes the parts of the View Choice dialog box. You can select only one of these options.

Part	Function
Gentran Data	Displays the raw EDI data.
External Data	Displays the data file used in translation. **Note:** This option is not available if the external data file used in translation does not exist.
Formatted Document	Displays the data in the Document Editor using a screen entry translation object. **Note:** This option is not available if no screen entry translation object exists for the document.
Translator Report	Displays a report of the actions the translator took on this document and lists any EDI- or translation object-based compliance errors.
Data Audit	Displays the document tracking information that is available for a single document. **Note:** This function is not available if document level auditing is disabled.
Tracking Information	Displays information that tracks an external data file.

Translator Report - Document

If you select Translator Report from the View Choice dialog box, a report of all the actions the translator took on this document will be displayed.

The following describes the parts of the Translator Report:

Part	Description
Trading Partner	Displays the name of your partner.
Direction	Indicates whether this document is inbound or outbound.
Interchange Control	Displays either the interchange control number or "Not Interchanged" if there is no interchange.
Group Control	Displays either the group control number or "Not Grouped" if there is no functional group.
Document Control	Displays the document control number.
Mode	Indicates whether the system is in Test or Production mode.
Document Name	Displays the name of the document.
Document Reference	Displays the document reference data.
Standard	Displays the EDI standard that is used in this trading relationship.
Version	Displays the version of the EDI standard that is used in this trading relationship.
Transaction Set	Displays the transaction set (document) that is used in this trading relationship.
Segment/Record ID	Displays the either the segment ID (for EDI files) or the record ID (for positional flat files).
Sequence	Displays the number of the sequential position of the segment or record (that is in error) in the file.
Element	Displays the sequential position of the element (EDI files) or box (positional flat files) that is in error, within the segment.
Composite	Displays the sequential position of the component element that is in error, within the composite element.

Part	Description
Data	Displays pertinent information about certain errors.
Message Number	Contains a prefix, a dash ("-"), and a four digit number that identifies the error. The following are the prefixes: • INF - Used only with information messages. Informational message are not defined here, because they are intended to be self-explanatory. • EDI - Used with all the messages listed below (all messages that are not informational). It is used if the error is related to an EDI file. • POS - Used with all the messages listed below (all messages that are not informational). It is used if the error is related to a positional flat file.
Message	Displays the error message.

Print Choice Dialog Box

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

The following illustrates the Print Choice dialog box:
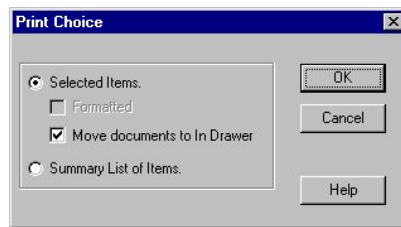
The following describes the parts of the Print Choice dialog box.

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

Select Export Method Dialog Box

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

Notes:

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

The following illustrates the Select Export Method dialog box:

The following describes the parts of the Select Export Method dialog box. You can select only one of these options.

Part	Function
Export to Single File	Converts all selected documents to data and accesses the Choose File to Export Document Dialog Box to write them to a single file.
Export to Default Files	Writes selected documents to the files set up in the partner inbound relationship.
Select File by Document	Accesses the Choose File to Export Document Dialog Box, which enables you to rename selected documents to be exported.

Document Search Dialog Box

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

The following illustrates the Document Search dialog box:
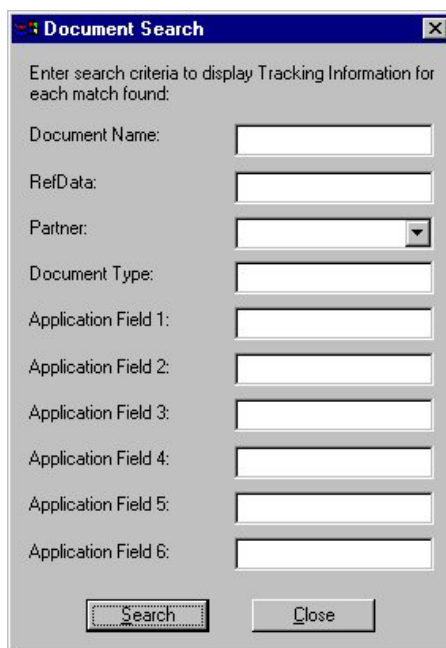
The following describes the document search criteria.

Function	Description
Document Name	Searches for documents with the specified user-assigned document name.
RefData	Searches for documents with the specified reference data (assigned by the translation object designer).
Partner	Searches for documents with the selected partner ID (identifies the partner for/from whom the document was generated or received).
Document Type	Searches for documents of the specified EDI type. For example: 810 identifies an invoice.
Application Field 1	Searches for documents with the specified value in Application Field 1.
Application Field 2	Searches for documents with the specified value in Application Field 2.
Application Field 3	Searches for documents with the specified value in Application Field 3.
Application Field 4	Searches for documents with the specified value in Application Field 4.
Application Field 5	Searches for documents with the specified value in Application Field 5.
Application Field 6	Searches for documents with the specified value in Application Field 6.

Search Results Dialog Box

After you enter criteria and click Search, the system displays the Search Results dialog box as shown below:
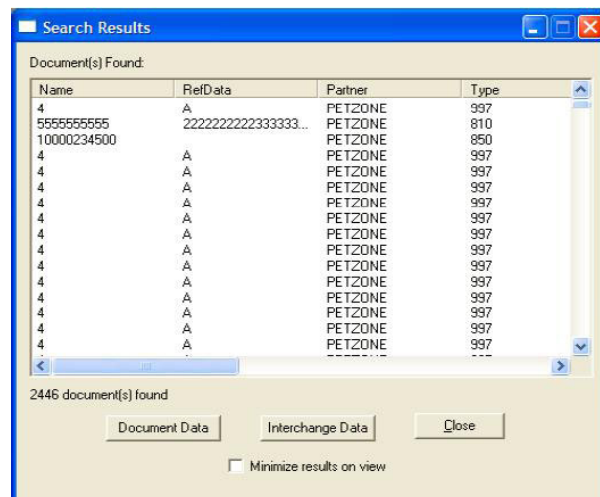
The following describes the search results functions.

Function	Description
Document Data	Displays data for a document. To display data for the document, select the document from the list and click Document Data **Note:** You can also use this function by right-clicking the document and selecting Document Data.

Function	Description
Interchange Data	Opens the Interchange Browser and displays interchange data for the document. To display for interchange data for the document, select the document from the list and either click Interchange Data. **Note:** You can also use this function by right-clicking the document and selecting Interchange Data.
Minimize results on view	Minimizes the Search Results dialog box when viewing data, tracking information, or an interchange. To minimize results, select the check box.
Double-click	Displays the tracking information for the document. To display information, select an item and then double-click.

Filter Dialog Box

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

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

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

The following illustrates the Filter dialog box:
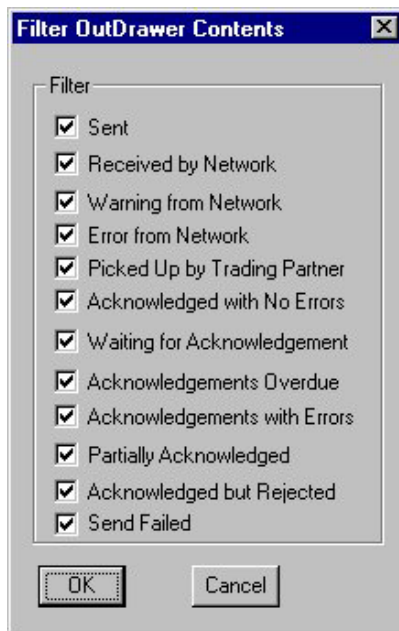
The following describes the filter criteria.

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

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

Preferences Dialog Box

Click **Preferences** to access the Preferences dialog box.

The following describes the parts of the Preferences dialog box.

Part	Description
Refresh	Allows you to automatically refresh document browsers at the specified interval.
Directories	Allows you to set default folders for imports, exports, and partners.
Change Password	Allows you to change your password.
Send Options	Allows you specify to automatically check for interchanges that are stuck in the Send Queue.
Interchange Filter	Displays the "Interchange Filter Dialog Box" on page 120.
External Data Filter	Displays the "External Data Filter Dialog Box" on page 114.
Browser Views	Allows you set the following Interchange Browser and Restored Interchange Browser settings: • Turn on External Data View • Turn on Gentran Data View • Turn on Translator Report View
Document Viewer	Select an external editor so you can view, edit, and save your documents outside of the EDI Manager.

Chapter 7. Managing Documents

Creating Documents

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

About this task

Note: The appropriate Screen Entry translation object must be registered and a corresponding Outbound relationship must be set up for the partner.

To create a document, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Workspace**.

   The system displays the Workspace Browser.
2. Click **New**.

   The system displays the Create New Document dialog box.
3. Select the appropriate partner/transaction set combination from the list and click **OK**.

   The system displays the translation object for the selected combination.
4. Type all the required data items into the boxes on the document translation object.

   Note: If the document contains a looping structure (lower-level detail records such as line items), the input translation object contains a list.
5. To access items in a list, highlight the first entry and click **New**.

   The system displays the list box.
6. Enter the data for the item.

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

   The system updates the totals and checks the document for errors.
8. When you are finished entering data, save the file.

   The system saves the information and automatically recalculates and check for errors. If errors are found, you are prompted to view the errors.
9. Select **File > Exit**.

   The system prompts you to save the document before closing.

   Note: You can now open and edit this document from the Workspace Browser.

Editing Documents

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

About this task

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

To edit a document, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Workspace**.

   The system displays the Workspace Browser.

2. Select the desired document from the Workspace.

   Notes:
   - Only documents in the Workspace can be edited.
   - If the document has already been moved to the Out Documents and has not been sent, you can move it back to the Workspace using the UnPost function (see UnPosting Documents).
   - If a document has been sent, it cannot be modified. However, you can move a copy of the document from the Out Drawer to the Workspace, modify the copy, and send it (see Copying a Document (to Reprocess and Resend)).

3. Click **Open**.

   The system displays the document in the Document Editor facility.

4. Modify the data as required.

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

5. To add a new line item, highlight the first entry and click New. To access items in the list, highlight the entry to be changed and click Open (or double-click the item).

   The system displays the list item details.

6. You can now change or enter the data for the item.

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

7. If the document contains calculated fields, select **File > Recalculate** before saving the document.

   The system updates the totals and checks the document for errors.

8. When you are finished entering data, save the file.

   The system saves the information and automatically recalculates and checks for errors. If errors are found, you are prompted to view the errors.

9. Select **File > Exit**.

The system prompts you to save the document before closing.

About Viewing Documents

The View function enables you to view various types of information, depending on the format selected in the View Choice Dialog Box.

The view types include:
* Raw input data
* External data
* EDI-formatted data
* Translator report
* Data audit
* Tracking information

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

The View function can be accessed using either of the following methods:
* A document browser is active and a single document is selected.
* The Interchanges or Restored Interchanges browser is active and a single document within an interchange is selected.

Viewing a Document from the Document Browsers

About this task

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

Procedure

1. From the appropriate area of The Desk, select one of the document browsers.
   The system displays the appropriate summary dialog box for that browser.
2. Select the type of document for the appropriate partner and click **View**.
   The system displays the browser containing those documents.
3. Select a single document from the appropriate browser.
4. Click **View**.
   The system displays the View Choice Dialog Box.
5. Select an option to display the input data:
   * To display raw EDI data, select **Gentran Data**.
   * To display the data file used in translation, select **External Data**.

     Note: This option is not available if the external data file used in translation does not exist.
   * To display the data in the Document Editor using a screen entry translation object, select **Formatted Document**.

Note: This option is not available if no screen entry translation object exists for the document.

- To display a report of the actions the translator took on this document and list any EDI- or translation object-based compliance errors, select **Translator Report**.
- To display the document tracking information available for a single document, select **Data Audit**.

  Note: This function is not available if document level auditing is disabled.

- To display information that tracks an external data file, select **Track Information**.

6. Click **OK** to access the view that you specified.

Viewing a Document from the Interchanges Browser

About this task

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

Procedure

1. From the appropriate area of The Desk, select the **Interchanges** browser.
2. Select a single document.
3. Click the **Data** icon on the Toolbar.

   The system displays the raw EDI data view of the Interchange (displayed in the Data View window on the Interchanges or Restored Interchanges browser).

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

Viewing Currently Processing Documents

The Processing Browser displays any document that is currently being processed in the Sterling Gentran:Server system.

About this task

This browser enables you to ascertain which documents are currently being processed by you or other users in the Sterling Gentran:Server system.

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

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

Procedure

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

Procedure

1. Select **View > Processing**.

   The system displays the Processing Browser.
2. You can view the currently processing documents or perform the function listed in this table.

   Note: You can use the Reset function to return to their previous location documents that are displayed in the Processing browser but for which processing has terminated. This is typically done when the processing of a document terminated improperly.

Finding Specific Text in a Document

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

About this task

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

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

To find specific text, complete the following steps.

Procedure

1. Access one of the following data-view windows.

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

To display this window	Do the following:
Audit Log	Select **View > Audit Log**.
Document Tracking	1. Select a document in a browser. 2. Select **Commands > View**. 3. Click the Tracking information option. 4. Click **OK**.
Interchange Tracking	1. Select an interchange in the Interchanges browser. 2. Select **Commands > View**. 3. Click the Tracking information option. 4. Click **OK**.
Raw Data View of an Interchange	1. Select **Interchanges** from the appropriate area of The Desk. 2. Select an interchange from the Interchanges browser. 3. Select **View > Interchanges > Data**.

To display this window	Do the following:
Raw Data View of a Document	1. Select a document in the Interchanges browser. 2. Select **Commands > View**. 3. Click **OK**.
External Data View of an Interchange	1. Select **Interchanges** from the appropriate area of The Desk. 2. Select an interchange from the Interchanges browser. 3. Select **View > Interchanges > External Data**.
External Data View of a Document	1. Select a document in the Interchanges browser. 2. Select **Commands > View**. 3. Click **External Data** and click **OK** on the View Choice dialog box.

2. Select **Edit > Find**.

   The system displays the Find dialog box.

3. Type the text you want to locate.

4. To search for case-sensitive text, select **Match Case**.

5. Click **Find Next** to find the first occurrence of the specified text.

   Notes:
   - If the system locates that text, it is highlighted in the data-view window.
   - If the system does not find the specified text, the system beeps. If this is the case, skip to step 7.

6. Continue clicking **Find Next** to find each subsequent occurrence of that text.

7. Click **Cancel**.

   The system returns to the data-view window.

Searching for Documents

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

About this task

To search for documents, complete the following steps.

Procedure

1. From the Commands menu, select **Document Search**.

   The system displays the Document Search Dialog Box.

2. Enter the appropriate criteria.

3. Click **Search**.

   The system displays the tracking data for each document it locates that matches the criteria you specified.

4. Double-click a document to display the associated tracking information.

Filtering Out Drawer Documents by Status

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

About this task

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

Procedure

1. From the appropriate area of The Desk, select the **Out Drawer**.

   The system displays the Out Drawer Summary dialog box.

2. Select the type of document for the appropriate partner and click **View**.

   The system displays the Out Drawer Browser.

3. Click **Filter**.

   The system displays the Filter Dialog Box.

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

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

5. Click **OK**.

   The contents of the Out Drawer browser are filtered as specified.

Deleting Documents

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

About this task

Notes:

- When a document is deleted, all the associated document information, tracking information, and translation report information is also deleted. When the last document in an interchange is deleted, the interchange entry is also deleted.
- Documents in the Send Queue can only be deleted from the Interchanges Browser.

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

Procedure

1. From the appropriate area of The Desk, select the location of the document.

   If you select one of the document browsers, the system displays the appropriate summary dialog box for that browser.

2. If the system displays a summary dialog box, select the type of document for the appropriate partner and click **View**.

3. Click **Delete**.

   The system displays a confirmation dialog box.

4. Click **Yes**.

The document is deleted.

Printing Documents

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

About this task

For selected documents, the Print function prints one of the following:
- Raw EDI data
- Formatted version of the documents using the print translation object established (partner relationship)
- Summary list of those documents

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

Procedure

1. From the appropriate area of The Desk, select the location of the document.

   If you select one of the document browsers, the system displays the appropriate summary dialog box for that browser.

2. Select the type of document for the appropriate partner and click **View**.

   The system displays the browser containing those documents.

3. To print a summary list of all documents, click **Print** and continue with step 6. Otherwise, continue with step 4.

4. To print selected documents (formatted or not) or a summary list of selected documents, select a document or group of documents and click **Print**. Otherwise, continue with step 6.

   The system displays the Print Choice Dialog Box.

5. On the Print Choice Dialog Box, select one of the following options and click **OK**:

   - To print selected unformatted documents, click **Selected Items**.

   - To print the selected documents as formatted (a print translation object must exist for the documents to be printed as formatted), click **Selected Items** and select **Formatted**.

   - To print from the In Documents Browser or ?In Documents Browser, either move the document to the In Drawer Browser or leave the document in place.

   - To print a summary list of selected documents, select **Summary List of Items**.

   The system displays the Print dialog box.

6. Set the appropriate options and click **OK**.

   Note: The system displays the Print dialog box if you either selected no documents from the browser and clicked Print, or if you chose Summary List of Items from the Print Choice dialog box.

Moving Documents to the In Drawer

This function moves a selected document or group of documents to the In Drawer browser. Documents are automatically moved from the In Documents browser or ?In Documents browser to the In Drawer browser by the system at the completion of a successful export or print. However, you might want to manually move a document to the In Drawer browser so you can create a turnaround (response) document.

About this task

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

Procedure

1. From the appropriate area of The Desk, select the In Documents browser or ?In Documents browser.

   The system displays the appropriate summary dialog box for that browser.
2. Select the type of document for the appropriate partner and click **View**.

   The system displays the browser containing those documents.
3. Select the documents that you want to move to the In Drawer Browser and click **Move**.

   The selected documents are moved to the In Drawer Browser.

Copying a Document (to Reprocess and Resend)

The Copy function copies a document (that was already sent successfully) to the Workspace Browser so you can modify the document and resend it.

About this task

Notes:
- The Copy function can only be used when Out Drawer is active.
- This function can result in sending duplicate documents to a trading partner.
- After you modify the documents, you may want to resend them. See Resending Documents for more information.

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

Procedure

1. From the appropriate area of The Desk, select **Out Drawer**.

   The system displays the Out Drawer Summary dialog box.
2. Select the type of document for the appropriate partner and click **View**.

   The system displays the Out Drawer Browser.
3. Select the documents that you want to copy to the Workspace Browser and click **Copy**.

   The selected documents are copied to the Workspace Browser.

Posting Documents

The Post function moves a selected compliant document or group of compliant documents to the Out Documents browser.

About this task

A document is compliant if it conforms to the validation rules as defined by the translation object. A document is designated compliant if the Status column contains OK. If the Status column contains NotOk, the document is not compliant and is not posted.

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

To post a document or group of documents, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **the Workspace**.

   The system displays the Workspace Browser.

2. Select the compliant documents that you want to move to the Out Documents Browser.

   Note: A document is designated compliant if the Status column contains OK. If the Status column contains NotOk, the document is not compliant and is not posted.

3. Click **Post**.

   The selected documents are moved to the Out Documents Browsers.

UnPosting Documents

The UnPost function moves a selected document or group of documents to the Workspace browser.

About this task

You can use UnPost to prevent a document from being sent to a trading partner or to allow the document to be modified before it is sent. The UnPost function can only be used when the Out Documents Browser is the active browser.

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

Procedure

1. From the appropriate area of The Desk, select the **Out Documents**.

   The system displays the Out Documents Summary dialog box.

2. Select the type of document for the appropriate partner and click **View**.

   The system displays the Out Documents Browser.

3. Select the documents that you want to move back to the Workspace Browser and click **UnPost**.

   The selected documents are moved back to the Workspace Browser.

Responding to Documents

The Respond function automatically generates a response document by transferring data from an inbound source document.

About this task

The Respond function is only available when all of the following are true:
- The In Drawer is the currently selected browser.
- One or more documents are selected.
- Turn Around translation objects exist for the selected documents.

The Respond function creates a turnaround document (using the Turn Around translation object from the Partner relationship) in response to the currently selected documents. You can create a turnaround document for non-compliant documents (documents with a NotOK status), as well as for compliant documents.

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

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

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

Procedure

1. From the appropriate area of The Desk, select **In Drawer**.

   The system displays the In Drawer Summary dialog box.

2. Select the type of document for the appropriate partner and click **View**.

   The system displays the In Drawer Browser.

3. Select the document or documents for which you want to create a turnaround (response) document and click **Respond**.

   - The system automatically creates a turnaround document in response to each document you selected by using the Turn Around translation object that you specified in the Partner relationship.
   - The turnaround documents that are produced are displayed in the Workspace for you to modify, if necessary, before posting to the Out Documents Browser.

Importing Documents

Sterling Gentran:Server allows you to import data from data files as an alternative to using the Document Editor to enter data directly into the system.

About this task

To import a document, you must have a system import and/or import translation object for the transaction set that is imported, registered with the system.

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

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

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

To import a document, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **the Workspace**.

   The system displays the Workspace Browser.
2. Click **Import**.

   The system displays the Application Files to Import dialog box.
3. Select the file or files to be imported and click **Open**.

   Note: You may not send non-compliant documents—either delete those documents and reprocess them from the data file, or correct the documents in the Document Editor (if you have Screen Entry translation objects for them).

   Important: If you import a file and no documents are displayed in the Workspace Browser, check the Audit Log.

   The system imports the documents into the Workspace Browser. The documents either have an OK status (the documents were successfully read and compliance checked) or a NotOK status (the documents failed compliance checking).

Exporting Documents

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

About this task

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

To export a document, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select the In Documents Browser, ?In Documents Browser, or In Drawer Browser.

   The system displays the appropriate summary dialog box for the selected browser.
2. Select the type of document for the appropriate partner and click **View**.

   The system displays the appropriate document browser.
3. Select the document or documents that are to be exported, and click **Export**.

   The system displays the Select Export Method Dialog Box.
4. Select one of the following options and click **OK**:

- To convert all selected documents to data and write them to a single file, select the Export to Single File option.
- To write selected documents to the files set up in the partner inbound relationship, select the Export to Default Files option.
- To rename selected documents, select the Select File by Document option.

The system displays the Choose File to Export Document Dialog Box.

Chapter 8. Communications

About Communications

The Communications feature enables you to send and receive data from your trading partners.

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

Stage	Description
1	The documents in the selected interchange are batched into EDI envelopes and the required information (including control numbers) is generated from the information in the partner profile.
2	After the interchange is built, it is listed in the Interchange browser.
3	Communication is established with the remote end. The status of the message is updated based on the success or failure of the communications session. • If the communication fails because there is no mailbox set up or the Mailbox service is not started, the interchange and documents are left in a Ready to send status. • If communication fails because there is no modem, the interchange and documents are left in a Queued status. **Note:** No user action is required at this point. Interchanges that failed to send are automatically sent as part of the next transmission session.
4	After a successful communications session, the documents are moved to the Out Drawer and the interchange status is set to Sent.

Send Queue Browser

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

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

The following illustrates the Send Queue browser:
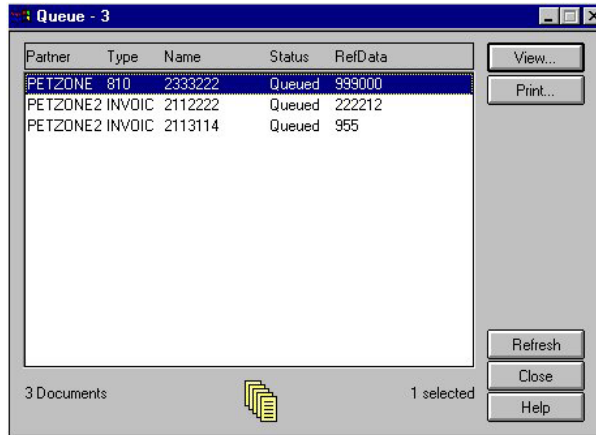
The following describes the parts of the Send Queue browser.

Part	Function
Partner	Name of the partner to whom the document is being sent.
Type	Type of document being sent.
Name	Document name.
Status	Status of the document.
RefData	
View	Accesses the View Choice Dialog Box, which allows you view the selected document.
Print	Accesses the Print Choice Dialog Box, which allows you to print the selected document.

Communication Session Dialog Box

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

The following illustrates the Communications Session dialog box:
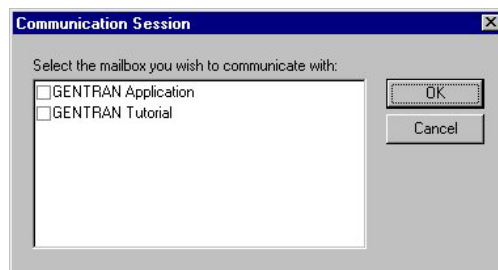
The following describes the parts of the Communications Session dialog box.

Part	Function
Select the mailbox you wish to communicate with	Displays the list of Sterling Gentran:Server mailboxes.

Sending Documents

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

Procedure

1. From the appropriate area of The Desk, select **Out Documents**.

   The system displays the Out Documents Summary dialog box.

   Note: If the documents to be sent are not in the Out Documents Browser, you must post the documents from the Workspace Browser to the Out Documents Browser.

2. Select the type of document for the appropriate partner and click **View**.

   The system displays the Out Documents Browser.

3. Select the document or documents that need to be sent.

4. Click **Send**.

5. Click **Yes** to start the transmission session.

Sending All Documents

Sending All Documents Method 1

This action sends all documents currently located in the Out Documents for which the partner is using one of the selected mailboxes.

About this task

To send all documents, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Transmit**.

2. Click **Yes** to start the transmission session.

   The system displays the Communications Session Dialog Box.

3. Select one or more mailboxes for which you want to send data.

4. Click **OK** to start a communication session to send data (click Cancel if you want to cancel the transmission session).

   If there are no documents in the Out Documents or interchanges with a Ready status in the Interchanges browser, a receive-only session is performed and, as a result, the In Documents and ?In Documents are updated with any data received.

Sending All Documents Method 2

All documents in the Out Documents are sent to the appropriate mailboxes.

About this task

To send all documents, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Out Documents**.

   The system displays the Out Documents Summary dialog box.

Note: If the documents to be sent are not in the Out Documents, you must post the documents from the Workspace to the Out Documents.

2. Select the type of document for the appropriate partner and click **View**.

   The system displays the Out Documents Browser.

3. Do not select any documents. If any documents are selected, press **Ctrl** and click on the documents to deselect them.

4. Click **Send**.

5. Click **Yes** to start the transmission session.

Resending Documents

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

About this task

To resend a document, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Out Drawer**.

   The system displays the Out Drawer Summary dialog box.

2. Select the type of document for the appropriate partner and click **View**.

   The system displays the Out Drawer Browser.

3. Select the document or documents that need to be resent.

4. Click **Copy** to make a copy of the document and place the copy in the Workspace.

5. From the appropriate area of The Desk, select **Workspace**.

   The system displays the Workspace Browser.

6. Make any necessary changes to the documents.

   Note: You can modify a document only if there is a Screen Entry translation object for the partner relationship.

7. Select the documents and click **Post**.

   The documents are posted to the Out Documents Browser.

8. From the appropriate area of The Desk, select **Out Documents**.

   The system displays the Out Documents Summary dialog box.

9. Select the type of document for the appropriate partner and click **View**.

   The system displays the Out Documents Browser.

10. Select the documents and click **Send**.

11. Click **Yes** to start the transmission session.

Receiving Documents

Receiving Documents Method 1

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

About this task

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

Procedure

1. Select **Commands > Receive**.

   The system displays the Communications Session Dialog Box.
2. Click **OK** to start a communication session to send data.

   Note: The system initiates a receive-only session and the In Documents Browser and ?In Documents Browser are updated with any data received.

Receiving Documents Method 2

This action initiates a communications session and updates the In Documents browser and ?In Documents browser with any data received as a result of that session.

About this task

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

Procedure

1. Select **View > In Documents**.

   The system displays the In Documents Summary dialog box.
2. Select the type of document for the appropriate partner and click **View**.

   The system displays the In Documents Browser.
3. Click **Receive**.

   The system displays the Communications Session Dialog Box.
4. Select one or more mailboxes for which you want to send data.
5. Click **OK** to start a communication session to send data.

Viewing the Send Queue

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

About this task

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

To view the Send Queue, complete the following steps.

Procedure

1. Select **View > Send Queue**.

   The system displays the Send Queue Browser.
2. Select a document or documents.
3. Click **View** to view the contents of any of the following:
   - Selected document (raw EDI data)

- Formatted document
- Translation report

4. Click **Print** to print the selected documents or summary of the documents.

Processing Data Files

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

About this task

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

Procedure

1. Select **Commands > Process File**.

   The system displays the Process File Dialog Box.
2. Navigate to and select the desired data file and click **Open**.

Chapter 9. External Data

About External Data

Sterling Gentran:Server can track the relationship between an EDI document or interchange and the corresponding external (application) data.

For import processing, the system makes a persistent copy of the external data at the start of processing. For inbound (process file and export) processing, the system again copies the external data file for persistent storage. Sterling Gentran:Server also enables you to archive external data.

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

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

External Data Viewer

The External Data viewer enables you to do the following:

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

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

External Data Summary Viewer

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

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

Level	How to access	Information displayed
External data file (numbered)	Open External Data Summary Viewer.	• File path and name • Date and time the file was created

Level	How to access	Information displayed
Document or Interchange	Double-click an external data file.	• Document or interchange control number • Associated partner • Document type • Acknowledgement status • Document name • Reference data • Date and time the document was created **Note:** If any of these components are missing or not appropriate for a particular group, they are not displayed.

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

The following illustrates the External Data Summary Viewer with external data, EDI data, and translator report options turned on:
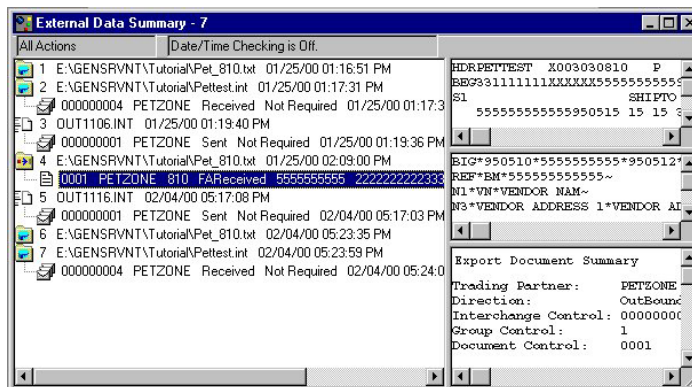
The following describes the parts of the External Data Summary Viewer.

Part	Function
Status bar	Displays the filer specifications from the External Data Filter Dialog Box.
left pane - external tree	Displays a list of all external data files and (if available) an associated EDI document or interchange that was sent or received.
upper right pane - External Data	Displays the data file used in translation (if this option is selected from the View > External Data menu).
middle right pane - Gentran® Data	Displays the associated document in EDI format (if this option is selected from the View > External Data menu). **Note:** This option is not available if the document used in translation does not exist.

Part	Function
lower right pane - Export Document Summary Translator Report	Displays a report of the external actions the translator took on this document and lists any EDI- or translation object-based compliance errors (if this option is selected from the View > External Data menu).

Icons

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

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

Viewing External Data Files

About this task

To view external data files, complete the following steps.

Procedure

1. Select **View > External Data > Browser**.

   The system displays the External Data Summary Viewer.
2. To filter the display of external data files by action or date, see Filtering External Data Files.
3. Select an external data file.
4. To view the external data for a single selected file, select **View > External Data > Related External Data**.

   Note: When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
5. To view the related EDI data, select **View > External Data > Gentran Data**.

   Note: When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
6. To view the translator report for actions taken on the external data file, select **View > External Data > Translator Report**.
7. To delete the external data file from the External Data folder, select the appropriate file in the left pane of the viewer. Select **View > Delete**.

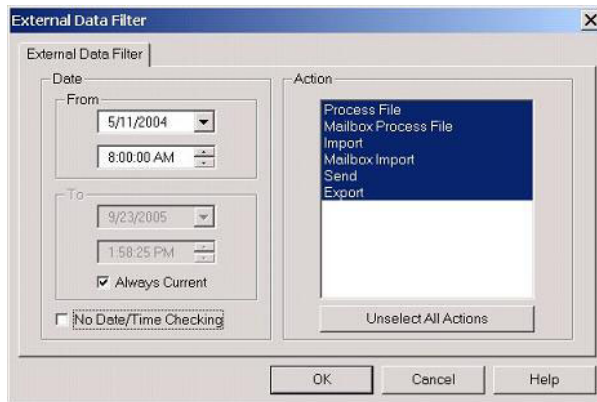8. To print the external data file, EDI data, or translator report, select the appropriate right pane of the viewer. Select **File > Print**.

External Data Filter Dialog Box

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

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

The following illustrates the External Data Filter dialog box:

The following describes the parts of the External Data Filter dialog box.

Part	Function
Date From	Select the beginning date and time of a date/time range, from which the system filters the display of external data files. **Note:** The Date From box is only active if the No Date/Time Checking check box is not selected.
Date To	Select the end date and time of a date/time range, to which the system filters the display of external data files. **Note:** The Date To box is not active if either the No Date/Time Checking check box is selected or the Always Current check box is selected.
Always Current	Indicate that the end date for the date range is always the current system date and time. **Note:** The Always Current check box is only active if the No Date/Time Checking check box is not selected.
No Date/Time Checking	Indicate if the system filters the display of external data files by date and time (if selected).
Action	Contains a list of all the actions the system can perform using external data files. This list allows you to filter the display of external data files by the actions you specify. **Note:** The default display is all actions, but you can clear them.
Unselect All Actions	Clears all the actions. **Note:** This allows you to filter the display of external data files by the actions you specify. **Important:** At least one action must be selected.

Filtering External Data Files

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

About this task

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

Procedure

1. Select **View > External Data > Browser**.

   The system displays the External Data Summary Viewer.

2. Select **Commands > Filter**.

   The system displays the External Data Filter Dialog Box.

3. To filter the display of external data files by date and time, clear the **No Date/Time Checking** check box. Otherwise, select **No Date/Time Checking** and continue with step 6.

4. Use the Date From slide bar to select the beginning date of a date range, from which the system filters the display of external data files.

5. If you want the end date for the date range to always be the current system date and time, select **Always Current**. Otherwise, clear the **Always Current** check box and move the **Date to** slide bar to the date and time you want to use.

6. To filter the display of external data files by action, from the Action list, select the actions that you want displayed.

   Note: The default display is all actions, but you can click actions to clear them and change the display. Alternately, you can click Unselect All Actions to clear all actions, so you can then click the one or more actions to select them. At least one action must be selected.

7. Click **OK**.

   The system filters the display of the external data files using the criteria you specified.

Chapter 10. Interchanges

Interchanges Browser

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

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

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

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

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

Level	How to access	Information displayed △(in middle pane)
Interchange	Open Interchanges browser.	• Direction of the interchange • Date and time the interchange was created • Partner name • Control number • Interchange process status • Network status • Interchange acknowledgement status • Message status **Note:** If any of these components are missing or not appropriate for a particular interchange, they are not displayed.
Group	Double-click an interchange.	• Group control number • Group type • Group acknowledgement status **Note:** If any of these components are missing or not appropriate for a particular group, they are not displayed.

Level	How to access	Information displayed △(in middle pane)
Document	Double-click a group.	• Document compliant status • Document control number • Document type • Document name • Reference data • Document compliant status • Transaction acknowledgement status **Note:** If any of these components are missing or not appropriate for a particular document, they are not displayed.
document data	Double-click a document.	Document data **Note:** A screen entry translation object for that document must available on your system.

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

    Note: When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
* Toggle the status of interchanges between Ready to Send and Hold.
* Manually change the status of groups to Acknowledged.
* Print or delete a selected item.

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

The following illustrates the Interchanges browser with external data, EDI data, and translator report options turned on:
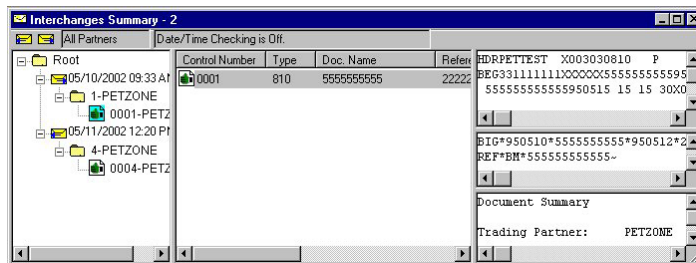
The following describes the parts of the Interchanges browser.

Part	Function
Status bar	Reflects the filer specifications from the Interchange Filter Dialog Box. **Note:** The EDI Manager status bar is updated when you select a single item from the middle pane.

Part	Function
left pane - Interchanges tree	Displays a list of all the interchanges, groups, and documents that were sent or received. Also displays the time created and partner name.
middle pane - detailed list	Displays a detailed list of the selected interchange, group, or document. The information displayed depends on the level.
upper right pane - External Data	Displays the data file used in translation (if this option is selected from the View > Interchanges menu). **Notes:** • This option is only available if a single item is selected from the detailed list. • This option is not available if the external data file used in translation does not exist. • When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
middle right pane - Gentran Data	Displays the data in EDI format (if this option is selected from the View > Interchanges menu). **Notes:** • This option is only available if a single item is selected from the detailed list. • When viewing raw-EDI or external data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
lower right pane - Translator Report	Displays a report of the actions the translator took on this document and lists any EDI- or translation object-based compliance errors (if this option is selected from the View > Interchanges menu). **Note:** This option is only available if a single item is selected from the detailed list.

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

Status	Icon	Description
OK		(green, thumbs-up) - Indicates that the documents are fully compliant with the EDI standard and are eligible for further processing.

Status	Icon	Description
NotOK		(red, thumbs-down) - Indicates one of the following: • The document failed to comply with the EDI standard. If this is the cause of the error, the errors will be indicated on a translator report associated with the document. Despite the fact that the document is not fully compliant, it is eligible for further processing. • The received document could not be associated with a specific trading partner. If this is the case, the partner for the document is listed as Unknown. To associate this document, and the other documents received in the interchange with a partner, attach the documents from the Interchange browser. • A suitable trading relationship or translation object could not be associated with the document. Detailed information concerning what information was used to locate the relationship and/or the translation object will be listed in the audit log. To correct this problem, a valid relationship must be established using the Partner Editor and a valid export, print, or turn-around translation object must be defined for that relationship. • A major error occurred while processing the interchange, functional group, or transaction level enveloping structures. This error may include header and trailer control numbers that do not match, an invalid trailer control count, or a control number sequence checking error. If any of these errors occur, they will be listed on the translator report for the interchange containing the document.
Duplicate		(yellow, thumbs-down) - Indicates the document has the same name as another document on the system.

Translator Report

Click **Translator Report** to toggle the display of the interchange or document translator report (depending on which item has focus) in the Translator Report section of the Interchanges or Restored Interchanges browser for the selected item. A checkmark means that the display of translator report is on.

Note: The Translator Report function is only active if the Interchanges or Restored Interchanges browser has focus.

Interchange Filter Dialog Box

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

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

The following illustrates the Interchange Filter dialog box:

The following describes the parts of the Interchange Filter dialog box.

Part	Function
Date From	Select the beginning date of a date range, from which the system should filter the display of interchanges. **Note:** The Date From box is only active if the No Date/Time Checking check box is not selected.
Date To	Select the end date of a date range, from which the system should filter the display of interchanges. **Note:** The Date To box is not active if either the No Date/Time Checking check box is selected or if the Always Current check box is selected.
Always Current	Indicate that the end date for the date range is always the current system date and time. **Note:** The Always Current check box is only active if the No Date/Time Checking check box is not selected.
No Date/Time Checking	Indicate if the system filters the display of interchanges by date and time (if selected).
Partner	Contains a list of all partner profiles on your system. This list allows you to filter the display of interchanges by the partners you specify. **Note:** The default display is all partners, but you can click on partner profiles to clear them.
Unselect All Partners	Clears all partner profiles. **Note:** This allows you to filter the display of interchange by the partners you specify. **Important:** At least one partner must be selected.
Inbound△Outbound	Select the direction of traffic (inbound and outbound) for the system to filter the display of interchanges. **Note:** The default display is both inbound and outbound interchanges. **Important:** At least one of the Inbound/Outbound check boxes must be selected.

Viewing Interchanges

About this task

To view interchanges, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Interchanges**.

   The system displays the Interchanges Browser.

2. To filter the display of interchanges by status, see Filtering the Display of Interchanges.

   Note: The Filter function enables you to filter the display of interchanges by date, partner, and direction (inbound and outbound).

3. Select an interchange.

4. To view the related external data for a single selected interchange, select **View > Interchanges > Related External Data**.

   Note: When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.

5. To view the content of a single selected interchange in raw EDI data format, select **View > Interchanges > Gentran Data.**

   Note: When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.

6. To view the translator report for a single selected interchange, select **View > Interchanges > Translator Report**.

7. To print a selected interchange or a summary of interchanges, select **File > Print**.

8. To delete a selected interchange and all associated documents, select **Document > Delete**.

   Notes:

   - If you delete an interchange with a status of Queued, you receive a warning that you must remove specified messages from Out Documents and from your trading partner's inbox. If you proceed, you are warned that if your partner bases processing results on control number sequencing, you should modify the transaction, group, and interchange control numbers.

   - If you delete an interchange with a status of Ready to send, you are warned that if your partner bases processing results on control number sequencing, you should modify the transaction, group, and interchange control numbers.

   - If an interchange contains a document that is waiting for acknowledgement processing (acknowledgement generation or reconciliation), you cannot delete it until this processing is complete.

9. To attach an interchange to a partner, select **Document > Attach**.

Filtering the Display of Interchanges

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

About this task

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

Procedure

1. From the appropriate area of The Desk, select **Interchanges**.

   The system displays the Interchanges Browser.

2. Select **Commands > Filter**.

   The system displays the Interchange Filter Dialog Box.

3. To filter the display of interchanges by date and time, clear the **No Date/Time Checking** check box. Otherwise, select **No Date/Time Checking** and continue with step 6.

4. Use the Date From slide bar to select the beginning date of the date range, from which the system will filter the display of interchanges.

5. If you want the end date for the date range to always be the current system date and time, select **Always Current**. Otherwise, clear the **Always Current** check box and move the Date to slide bar to the date and time you want to use.

6. To filter the display of interchanges by partner, select the partners that you want displayed from the Partner list (lists all partner profiles on your system).

   Note: The default display is all partners, but you can click partner profiles to clear them and change the display. Alternately, you can click Unselect All Partners to deselect all partner profiles. You can then click one or more profiles to select them. At least one partner must be selected.

7. Select the direction you want to filter the interchange.

   The default display is both inbound and outbound interchanges.

   Note: At least one of the Direction check boxes must be selected.

8. Click **OK**.

   The system filters the interchange display based on the criteria you selected.

Viewing Documents within Interchanges

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

About this task

Use this procedure to view the documents within an interchange.

Procedure

1. From the appropriate area of The Desk, select **Interchanges**.

   The system displays the Interchanges Browser.

2. Select a document and proceed with the next steps or double-click a document to view it.

   Note: You must have a screen entry translation object for this document available on your system.

3. To view a translator report of the actions the translator took on this document, select **View > Interchanges > Translator Report**.

4. To view the content of a single selected interchange in raw EDI data format, select **View > Interchanges > Gentran Data**.

   Note: When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.

5. To view the related external data of a single selected interchange, select **View > Interchanges > Related External Data**.

   Note: When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.

6. To print a selected document or translation report, select **File > Print**.
7. To delete a selected document, select **Document > Delete**.
8. To copy the document to the appropriate browser, select **Document > Copy** and select the appropriate browser from the submenu.

Attaching Interchanges to a Partner

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

Before you begin

You must create the partner before you can complete this task. See Creating a Partner Definition for instructions.

About this task

Note: The interchanges for these documents are listed without a partner in the Interchanges browser.

Use this procedure to attach an interchange to a partner.

Procedure

1. From the appropriate area of The Desk, select **Interchanges**.

   The system displays the Interchanges Browser.
2. Select one interchange.
3. Select **Document > Attach**.

   The system displays the Select Partner dialog box.
4. Select the desired partner from the list and click **OK**.

   The system links the selected interchange to this partner and returns to the Interchanges browser.

   If the partner to which you are attaching the interchange has more than one interchange definition, you are prompted with an additional dialog box. If not, continue with step 8.
5. If your partner has more than one interchange definition, select the appropriate interchange definition and click **OK**.
6. If your partner has more than one group definition, select the appropriate group definition and click **OK**.
7. If your partner has more than one relationship defined for a document type in the interchange, select the appropriate relationship definition and click **OK**.
8. After you attach the interchange to a partner, open **?In Documents** from the appropriate area of The Desk.

Note: You can then export, print, or move the documents to the In Drawer Browser.

About Resending Interchanges

There are several ways to resend interchanges.

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

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

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

Stage	Description
1	When the resend command is executed, the system first determines if it is a TRADACOMS interchange. If the interchange is TRADACOMS, the system increments the current version number in the FIL segment by one. After this update, the interchange is resent in the same manner as all other interchanges. **Note:** Other standards do not use a version number.
2	Communication is established with the remote end. The status of the message is updated based on the success or failure of the communications session. • If communication fails because there is no mailbox set up or the Mailbox service is not started, the interchange and documents are left in a Ready to send status. • If communication fails because there is no modem, the interchange and documents are left in a Queued status. **Note:** No user action is required at this point. Interchanges that failed to send are automatically sent as part of the next transmission session.
3	The documents are moved to the Out Drawer Browser and the interchange status is set to Sent.

Resending Interchanges Automatically

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

About this task

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

To automatically resend outbound interchanges, complete the following steps.

Procedure

1. Select **Options > Preferences**.

   The system displays the Preferences dialog box.
2. Click the **Send Options** tab.
3. Select **Check for interchanges that did not send**.
4. Click **OK**.

   Optional -
5. Change the System Check Interval in the registry.

   Note: This is an optional step. The default is 30 minutes.
6. Restart services.

Queueing Interchanges

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

About this task

- **Example 1** - Interchanges are queued for resending to mailbox SIB. A communications session for the "Gentran Tutorial" mailbox executes. The queued interchange are not sent.
- **Example 2** - Interchanges for the partner PETZONE are queued for resending. A communications session for data only for the partner PETZONE2 executes. The queued interchanges are not sent.

To queue interchanges for sending with the next communications session, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Interchanges**.

   The system displays the Interchanges Browser.
2. Select the outbound interchange that needs to be resent.
3. Select **Document > Queue for Resend**.

   The Interchanges Process Status changes to "Ready to Send."

Resending a Specific Interchange
About this task

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

Procedure

1. From the appropriate area of The Desk, select **Interchanges**.

   The system displays the Interchanges Browser.
2. Select the outbound interchange that needs to be resent.
3. Select **Document > Resend**.
4. Click **Yes** to start the transmission session.

Manually Acknowledging an Interchange, Group, or Document

The Acknowledge function does not generate an acknowledgement; it merely changes the status of the outbound document.

About this task

The status of an interchange, group, or document in the Interchanges browser may need to be manually set to acknowledged for many reasons. For example, you contact a partner about an overdue document and the partner verifies that it was received but they did not send an acknowledgement.

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

Procedure

1. From the appropriate area of The Desk, select **Interchanges**.

   The system displays the Interchanges Browser.
2. Select an unacknowledged interchange, group, or document that needs to be set to acknowledged.

   Note: Unacknowledged documents are marked with one of the following:
   - Overdue
   - Waiting
   - Sent
   - OnNet
   - PickedUp
   - NetErr
   - NetWarn
3. Select **Document > Ack**.

   The system sets the status of the document to acknowledged.

Deleting Interchanges

You can delete a single selected interchange, or you can choose to delete all the interchanges filtered in the display.

Procedure

1. Highlight an interchange and click **Delete** or just click **Delete** if you want to delete all the interchanges based on the filter selection.

   The Selected Interchanges for Deletion dialog box is displayed.
2. To delete a single selected interchange, click **Selected Interchange**.

   To delete all the interchanges, based on what you selected on the Filter Interchanges dialog box, click **All Interchanges based on filter selection**.
3. Click **OK** to remove the selected interchanges and all the associated database entries.

   The Delete confirmation dialog box is displayed.
4. Click **Yes** to confirm or **No** to cancel.

Chapter 11. Envelopes

Outbound BAT Envelope

The Outbound Envelope allows you to determine outbound parameters for the BAT (TRADACOMS) option. The Outbound BAT Envelope dialog box is displayed.

The following describes the parts of the Outbound BAT Envelope.

Part	Description
Send BAT Segment	Select this to send the BAT segment.
Functional Group ID	Displays the functional group ID assigned by the standards (such as, "BAT").
Message Reference Number (BAT01)	Define the beginning group control number for generating group control envelopes. The system will assign control numbers sequentially, adding one to the number you specify here. If you specify "0", the system will assign "1" as the beginning group control number.
Controlling Agency	Mandatory. Define the code that identifies the agency controlling the specification, maintenance, and publication of the message type. For the TRADACOMS standard, the controlling agency code is "A."
Version Number	Mandatory. Enter the version number of the message type in the functional group.
Last Control Number	Displays the group control number that was last used for generating group control envelopes. The system will assign control numbers sequentially, adding one to the number specified here.
fields 1 - 10	Fields 1 - 10 are available for your use, regardless of whether or not you send the BAT segment. You can use these fields to add segments to the header and trailer of a Group Build Map. See the *Application Integration User Guide* for more information.

Outbound BG Envelope

The Outbound Envelope allows you to determine outbound parameters for the BG (UCS) option. The Outbound BG Envelope dialog box is displayed.

The following describes the parts of the Outbound BG Envelope.

Note: All entries in this dialog box are mandatory.

Part	Description
Communication ID (BG01)	Define your BG communication identifier. This ID will appear on the BG interchange header.
Communication Password (BG02)	Define a password that is agreed upon by you and your trading partner. This password will appear on the BG Interchange Header.
Applications Sender Code (BG03)	Enter your sender EDI ID. This identifies your sender ID in outgoing messages. This value will appear in the BG interchange header segment.

Part	Description
Applications Receiver Code (BG04)	Designate this trading partner's application receiver code as it will appear on the BG interchange header. This identifies your partner's sender ID in outgoing messages.
Last Used Control Number (BG07)	Define the group control number that was last used for generating group control envelopes. The system will assign control numbers sequentially, adding one to the number you specify here. If you specify zero, the system will assign "1" as the beginning group control number.
Element Separator	Define the value that separates the elements in an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."
Segment Terminator	Define the value that identifies the end of an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."

Outbound GS Envelope

The Outbound Envelope allows you to determine outbound parameters for the GS (X12, EDIA, or UCS) option. The Outbound GS Envelope dialog box is displayed.

The following describes the parts of the Outbound GS Envelope.

Part	Description
Functional Group ID (GS01)	Displays the Group ID as defined for the Partner ID. This is the functional group ID assigned by the standards.
Applications Senders Code (GS02)	Mandatory. Enter the ID for your company. This value will appear in the GS segment. **Note:** The minimum length is 2 and the maximum length is 15.
Applications Receivers Code (GS03)	Mandatory. Enter your Trading Partner's ID. This value will appear in the GS segment. **Note:** The minimum length is 2 and the maximum length is 15.
Last Used Control Number (GS06)	Define the group control number that was last used for generating group control envelopes. The system will assign control numbers sequentially, adding one to the number you specify here. If you specify zero, the system will assign "1" as the beginning group control number.

Part	Description
Responsible Agency Code (GS07)	Mandatory. Define the standards agency responsible for the standard in the GS segment: • T = TDCC • U = UCS • X = ANSI X12 **Note:** The minimum length is 1 and the maximum length is 2.
Version (GS08)	Mandatory. Enter the version number of the message type in the functional group.

Outbound ICS Envelope

The Outbound Envelope allows you to determine outbound parameters for the ICS (X12) option. The Outbound ICS Envelope dialog box is displayed.

The following describes the parts of the Outbound ICS Envelope.

Part	Description
Element Separator (ICS01)	Mandatory. Define the value that separates the elements in an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."
Sub-element Separator (ICS02)	Mandatory. Define the value that separates the parts of an outbound element. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."
Control Standards ID (ICS03)	Mandatory. Define the organization responsible for the EDI standard used in the interchange: • T = TDCC • U = USA EDI community • X = ANSI X12 • E = EDIFACT
Version (ICS04)	Mandatory. Enter the version of the EDI standards the system uses to process control envelopes sent to or received from this Trading Partner. Example: 002000.
Sender ID Qualifier (ICS05)	Mandatory. Define your Qualifier as it will appear on the interchange header segment sent to this Trading Partner. Qualifiers are predefined by the EDI standards.

Part	Description
Sender ID (ICS06)	Mandatory. Define your interchange ID. This identifies your sender ID in outgoing messages.
Receiver ID Qualifier (ICS07)	Mandatory. Define your Trading Partner's Qualifier as it will appear on the interchange header. Qualifiers are predefined by the EDI standards.
Receiver ID (ICS08)	Mandatory. Define this Trading Partner's interchange ID. This identifies your partner's sender ID in outgoing messages.
Control Number (ICS11)	Mandatory. Designate the beginning control sequence number for generating outbound interchange envelopes. The system will assign control numbers sequentially, adding 1 to the number you specify here. If you specify a zero, the system will assign "1" as the beginning control number for your first transmission.
Segment Terminator (ICS12)	Mandatory. Define the value that identifies the end of an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."

Outbound ISA Envelope

The Outbound Envelope allows you to determine outbound parameters for the ISA (X12 or EDIA) option. The Outbound ISA Envelope dialog box is displayed.

The following describes the parts of the Outbound ISA Envelope.

Part	Description
Authorization Code Qualifier (ISA01)	Mandatory. Indicate if an authorization code is present. **Note:** The minimum length is 1 and the maximum length is 2.
Authorization Code (ISA02)	Define the authorization code that your Trading Partner assigned to you. **Note:** This is mandatory if the Authorization Code Qualifier is not equal to "00." The minimum length is 1 and the maximum length is 10.
Security Code Qualifier (ISA03)	Mandatory. Indicate if a security code is present. **Note:** The minimum length is 1 and the maximum length is 2.
Security Code (ISA04)	Define the security code that your Trading Partner assigned to you. **Note:** This is mandatory if the Authorization Code Qualifier is not equal to "00." The minimum length is 1 and the maximum length is 10.
Sender ID Qualifier (ISA05)	Mandatory. Define your Qualifier as it will appear on the interchange header segment sent to this Trading Partner. Qualifiers are predefined by the EDI standards. **Note:** The minimum length is 1 and the maximum length is 2.
Sender ID (ISA062)	Mandatory. Define your interchange ID. This identifies your sender ID in outgoing messages. **Note:** The minimum length is 1 and the maximum length is 15.

Part	Description
Receiver ID Qualifier (ISA07)	Mandatory. Define your Trading Partner's Qualifier as it will appear on the interchange header. Qualifiers are predefined by the EDI standards. **Note:** The minimum length is 1 and the maximum length is 2.
Receiver ID (ISA08)	Mandatory. Define this Trading Partner's interchange ID. This identifies your partner's sender ID in outgoing messages. **Note:** The minimum length is 1 and the maximum length is 15.
Control Standards Identifier (ISA11)	If the standard used is earlier than 4020, this displays the control standards identifier. If the standard is 4020 or later, this is inactivated. The Control Standards Identifier is the organization responsible for the EDI standard used in the interchange: • T = TDCC • U = USA EDI community • X = ANSI X12 • E = EDIFACT **Note:** Mandatory if the standard is earlier than 4020; one character.
Version (ISA12)	Mandatory. Enter the version of the EDI standards the system uses to process control envelopes sent to or received from this Trading Partner. Example: 002000. **Note:** The minimum length is 1 and the maximum length is 5.
Control Number (ISA13)	Designate the beginning control sequence number for generating outbound interchange envelopes. The system will assign control numbers sequentially, adding 1 to the number you specify here. If you specify a zero, the system will assign "1" as the beginning control number for your first transmission.
Acknowledgement Requested (ISA14)	Mandatory; default is 0. Set the acknowledgement request box on an outbound ISA: • "0" = No, interchange acknowledgement not requested. • "1" = Yes, interchange acknowledgement requested.
Test Indicator (ISA15)	Mandatory. Specify whether the interchange is in test or production mode: • blank = The interchange is in production mode. • "1" = The interchange is in test mode.
Element Separator	Mandatory. Define the value that separates the elements in an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."

Part	Description
Sub-element Separator	Mandatory. Define the value that separates the parts of an outbound element. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."
Segment Terminator	Mandatory. Define the value that identifies the end of an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."
Repetition Terminator (ISA11)	If the standard is 4020 or later, this displays the repeating element separator. If the standard is earlier than 4020, then this field is inactivated. **Notes:** • If the ISA11 is blank, and the version is less than 4020, the element separator is used as the repeating element separator. For the EDIFACT standard, this separator defaults to asterisk (*). • Mandatory if the standard is earlier than 4020; one character.

Outbound MHD Envelope

The Outbound Envelope allows you to determine outbound parameters for the MHD (TRADACOMS) option. The Outbound MHD Envelope dialog box is displayed.
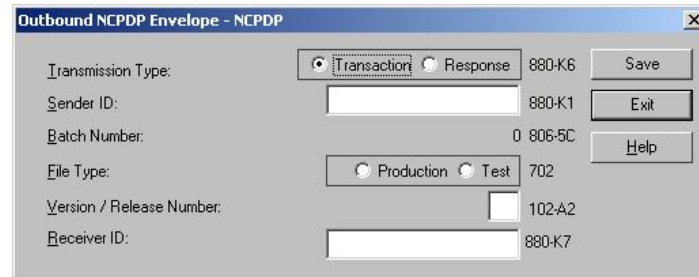
The following describes the parts of the Outbound MHD Envelope.

Part	Description
Message Reference Number (MHD01)	Displays a consecutive count of messages within a transmission. This is a unique reference number assigned by the system.
Message Type (MHD02)	Displays the type of message.
Message Release (MHD02)	Displays the release number of the current version number. This distinguishes the different versions of a message.

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.

Outbound Envelope PIP Initiation Dialog Box

The Outbound Envelope PIP Initiation dialog box is used to specify enveloping options for a PIP.

Note: The PIP Initiation requirements vary depending on which version of RosettaNet you are using.

RosettaNet version 1.1

This diagram illustrates the Outbound Envelope PIP Initiation dialog box (version 1.1).

This table describes the parts of the Outbound Envelope PIP Initiation dialog box for RosettaNet version 1.1.

Part	Function
Global Administering Authority Code	Specifies the controlling agency (RosettaNet). The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Version ID	Specifies the RNIF version number. This value is mandatory.
Global Usage Code	Indicates whether the PIP is test or production. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Action Identity	
Transaction Version ID	Specifies the version of message guideline that is used. This value is mandatory.
Process Identity Version ID	Specifies the PIP version. This value is mandatory.
Global Indicator Code	Specifies the RosettaNet-defined process. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Global Doc Function Code	Indicates whether the message is a "Request" or "Response." The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Sender: DUNS+4	Specifies the DUNS number of the partner sending the PIP. This value is mandatory.
Receiver: DUNS+4	Specifies the DUNS number of the partner receiving the PIP. This value is mandatory.
Sender: Global Partner Classification Code	Specifies the code used to describe the function of the partner sending the PIP. This value is mandatory.

Part	Function
Receiver: Global Partner Classification Code	Specifies the code used to describe the function of the partner receiving the PIP. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Receiver: Global Business Service Code	Specifies the service that the receiving partner is performing. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Time Allowance to Ack Acceptance	Specifies the amount of time allowed to acknowledge receipt of acceptance, other than the designated default amount of time. Format: Type time in minutes.
Time Allowance to Ack Receipt	Specifies the amount of time allowed to acknowledge receipt other than the designated default amount of time. Format: Type time in minutes.
Time Allowance to Perform	Specifies the time allotted to perform other than the designated default time. Format: Type time in minutes.
Sender: Global Partner Role Classification Code	Specifies a code used to describe the role of the partner sending the PIP. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Receiver: Global Partner Role Classification Code	Specifies a code used to describe the role of the partner receiving the PIP. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Global Transaction Code	Describes the message. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Global Process Code	Specifies the RosettaNet-defined code that describes the message type. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
PIP Initiating Partner: Global Business Identifier	Specifies the DUNS number of the partner sending the PIP. This value is mandatory.
Sender: Global Business Service Code	Specifies a code used to describe the service the sending partner is performing. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.

RosettaNet version 2.0

This diagram illustrates the Outbound Envelope PIP Initiation dialog box (version 2.0).

This table describes the parts of the Outbound Envelope PIP Initiation dialog box for RosettaNet version 2.0.

Part	Function
Global Administering Authority Code	Specifies the controlling agency (RosettaNet). The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
PIP Version	Specifies the version number of the PIP. This value is mandatory.
Version ID	Specifies the RNIF version number. This value is mandatory.
Global Usage Code	Indicates whether the PIP is test or production. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Sender: DUNS+4	Specifies the DUNS number of the partner sending the PIP. This value is mandatory.
Receiver: DUNS+4	Specifies the DUNS number of the partner receiving the PIP. This value is mandatory.
To Global Partner Role Classification Code	Specifies a code used to describe the role of the partner receiving the PIP. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
From Global Partner Role Classification Code	Specifies a code used to describe the role of the partner sending the PIP. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Business Activity Identifier	Specifies an identifier for special validation and processing rules corresponding to the currently executing PIP and activity. This value is mandatory.
From Global Business Service Code	Specifies a code used to describe the service the sending partner is performing. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Global Process Indicator Code	Specifies the RosettaNet-defined process. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Secure Transport Required	Indicates to the trading partner that all responses to this document must be sent using the SSL protocol.

Part	Function
To Global Business Service Code	Specifies the service that the receiving partner is performing. The applicable RosettaNet codes are listed in the Service Header Guideline. This value is mandatory.
Receiver Identification Domain	Specifies the DUNS number. This value is mandatory.
Receiver Location Identifier	Specifies a logical business location associated with this trading partner. This value is mandatory.
Sender Identification Domain	Specifies the DUNS number. This value is mandatory.
Sender Location Identifier	Specifies your logical business location associated with this trading partner. This value is mandatory.

Outbound ST Envelope

The Outbound Envelope allows you to determine optional outbound parameters for the ST (ANSI, UCS, TDCC) option. The Outbound ST Envelope dialog box is displayed.

The following describes the parts of the Outbound ST Envelope.

Part	Description
Implementation Convention Reference (ST03)	Optional. Type up to 35 characters for the implementation convention reference.

Outbound STX Envelope

The Outbound Envelope allows you to determine outbound parameters for the STX (TRADACOMS) option. The Outbound STX Envelope dialog box is displayed.

The following describes the parts of the Outbound STX Envelope.

Part	Description
Syntax ID (STX01)	Mandatory. Enter the Controlling Agency: • ANA • ANAA (if the reconciliation facility is used)
Syntax Version(STX01)	Mandatory. Define the version number associated with the syntax identifier.
Sender ID Code (STX02)	Define your interchange ID code as it will appear on the interchange header segment sent to this trading partner. **Note:** The Sender ID Code is mandatory if you do not complete the Sender ID Name box.
Sender ID Name (STX02)	Define your name as it will appear on the interchange header segment sent to this trading partner. **Note:** The Sender ID Name is mandatory if you do not complete the Sender ID Code box.
Recipient ID Code (STX03)	Define this trading partner's interchange ID code agreed on by you and your trading partner. **Note:** The Recipient ID Code is mandatory if you do not complete the Recipient ID Name box.

Part	Description
Recipient ID Name (STX03)	Define your trading partner's name as it will appear on the interchange header. **Note:** The Recipient ID Name is mandatory if you do not complete the Recipient ID Code box.
Senders Reference (STX05)	Displays your reference number for this transmission.
Recipients Reference (STX06)	Define your trading partner's reference number for this transmission, if you know it.
Application Reference (STX07)	Enter a message identification if the interchange contains only one type of message. This is used by the networks to validate the transmission by determining if you have the authority to send this type of message to the designated recipient.
Priority Code (STX08)	Enter the transmission priority code as mutually agreed upon with your trading partner. This code value must appear in the Code Values List 1 (Transmission Priority Codes): • A = Urgent • B = Normal • C = Low
Segment Code Separator	Define the value that separates the segment codes. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."
Component Element Separator	Define the value that separates the component data elements in a composite data element. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."
Element Separator	Define the value that separates the elements in an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."

Part	Description
Segment Terminator	Define the value that identifies the end of an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."
Release Indicator (SCH05)	Mandatory. Displays a character that is used to restore any character used as a syntactical separator to its original meaning.
Decimal Notation	Type either a comma or a period to indicate the decimal point in a numeric box. The period is recommended. **Note:** This box is mandatory and must be either a period or a comma.

Outbound UNA Envelope

The Outbound Envelope allows you to determine outbound parameters for the UNA (EDIFACT) option. The Outbound UNA Envelope dialog box is displayed.

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

The following describes the parts of the Outbound UNA Envelope.

Part	Description
Send UNA Segment	Select this to send the UNA segment.
Component Element (UNA01)	Mandatory. Define the value that separates the component data elements in a composite data element. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."

Part	Description
Element Separator (UNA02)	Mandatory. Define the value that separates the elements in an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."
Decimal Notation (UNA03)	Type either a comma or a period to indicate the decimal point in a numeric box. The period is recommended. **Note:** This box is mandatory and must be either a period or a comma.
Release Indicator (UNA04)	Mandatory. Type a character to restore any character used as a syntactical separator to its original meaning.
Repetition Separator (UNA05)	Displays the repeating element character.
Segment Terminator (UNA06)	Mandatory. Define the value that identifies the end of an outbound data segment. Do one of the following: • In the first box, type the special character (such as * or ^). The system converts it and enters the hex value for that character in the second box. • In the second box, type the hex value. The system converts it and enters the special character for that hex value in the first box. If there is no printable character that corresponds to the hex value, the character box will be blank. **Note:** The value must be between HEX "01" and HEX "FF."

Outbound UNB Envelope

The Outbound Envelope allows you to determine outbound parameters for the UNB (EDIFACT) option. The Outbound UNB Envelope dialog box is displayed.

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

The following describes the parts of the Outbound UNB Envelope.

Part	Description
Syntax ID (UNB0101)	Mandatory. Enter the Controlling Agency (for example, UNOA).
Syntax Version (UNB0102)	Define the version number associated with the syntax identifier. **Note:** If you type a version number earlier than version 4 in the Syntax Version box on the Outbound UHB Envelope dialog box, the system disables the version 4 fields in both the UNB and UNH dialogs and any data in those fields will not be saved when you exit the Outbound UNB Envelope dialog box.

Part	Description
Service List Directory Version (UNB0103)	Enter the version number of the service code list directory.
Character Encoding (UNB104)	Enter the coded identification of the character encoding used in the interchange.
Sender ID (UNB0201)	Mandatory. Define your interchange ID as it will appear on the interchange header segment sent to this trading partner.
Sender ID Qualifier (UNB0202)	Define your qualifier as it will appear on the interchange header segment sent to this Trading Partner.
Reverse Routing Address (UNB0203)	Define your reverse route code as mutually agreed on with this trading partner. **Note:** This is only displayed for EDIFACT versions earlier than version 4.
Sender Internal ID (UNB0203)	Enter the sender internal identifier. **Note:** This parameter is only displayed if you are using EDIFACT version 4. For version 4, this value allows 35 characters. For versions prior to 4, this value allows 14 characters.
Sender Internal Sub-ID (UNB0204)	Enter the sender internal sub-identifier. Sub-level of sender internal identification, when further sub-level identification is required. **Note:** This is only displayed for EDIFACT versions earlier than version 4.
Receiver ID (UNB0301)	Mandatory. Define this trading partner's interchange ID.
Receiver ID Qualifier (UNB0302)	Define your trading partner's qualifier as it will appear on the interchange header.
Receiver Routing Address (UNB0303)	Identify your trading partner's receive route code, as mutually agreed upon. **Note:** This is only displayed for EDIFACT versions earlier than version 4.
Recipient Internal ID (UNB0303)	Enter the recipient internal identifier. **Note:** This parameter is only displayed if you are using EDIFACT version 4. For version 4, this value allows 35 characters. For versions prior to 4, this value allows 14 characters.
Recipient Internal Sub-ID (UNB0304)	Enter the recipient internal sub-identifier. Sub-level of recipient internal identification, when further sub-level identification is required. **Note:** This is disabled for EDIFACT versions earlier than version 4.
Control Number (UNB05)	Displays the beginning control sequence number for generating interchange envelopes. The system will assign control numbers sequentially, adding one to the number you specify here. If you specify a "0", the system will assign "1" as the beginning control sequence number.
Receiver Password (UNB0601)	Define the password to the trading partner's system or third-party network.
Password Qualifier (UNB0602)	Define the qualifier associated with your trading partner's system or third-party network.
Application Reference (UNB07)	Enter a message identification if the interchange contains only one type of message.
Priority Code (UNB08)	Enter this trading partner's processing priority code as mutually agreed upon.

Part	Description
Acknowledgement Requested	Specify that you want this trading partner to acknowledge your request: • "1" = Yes, you want your Trading Partner to acknowledge your request. • blank = No, you do not expect an acknowledgement (system default).
Comm Agreement ID (UNB10)	Define the type of communication agreement controlling the interchange (for example, Customs or ECE agreement).
Test Indicator	Specify whether the interchange is in test mode or production mode: • "1" = The interchange is in test mode. • blank = The interchange is in production mode.
UNA	Displays the Outbound UNA Envelope.

Outbound UNG Envelope

The Outbound Envelope allows you to determine outbound parameters for the UNG (EDIFACT) option. The Outbound UNG Envelope dialog box is displayed.

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

The following describes the parts of the Outbound UNG Envelope.

Part	Description
Functional Group ID (UNG01)	Displays the Group ID as defined for the Partner ID. This is the functional group ID assigned by the standards.
Sender ID (UNG02)	Mandatory. Enter the ID for your company. This identifies your sender ID in outgoing messages. This value will appear on the UNA segment. **Note:** The minimum length is 1 and the maximum length is 35.
Qualifier (UNG02)	Enter the Qualifier Code associated with your Sender ID (if applicable). This value will appear on the UNA segment.
Recipients ID (UNG03)	Mandatory. Enter your Trading Partner's ID. This value will appear on the UNA segment. **Note:** The minimum length is 1 and the maximum length is 35.
Qualifier (UNG031)	Enter the Qualifier Code associated with your Trading Partner's Recipients ID (if applicable). This value will appear on the UNA segment.
Reference Number (UNG05)	Displays the beginning group control number for generating group control envelopes. The system will assign control numbers sequentially, adding one to the number you specify here. If you specify zero, the system will assign "1" as the beginning group control number. If you are using the EDIFACT standard and if there is no value here, the UNG will not be created.
Controlling Agency (UNG06)	Mandatory; three characters. Enter the code that identifies the agency controlling the specification, maintenance, and publication of the message type.

Part	Description
Version Number (UNG07)	Mandatory. Enter the version number of the message type in the functional group.
Release (UNG07)	Enter the release number of the current version number.
Association (UNG07)	Enter the code assigned by the association responsible for the design and maintenance of the message type.
Application Password (UNG08)	Define the application password for your trading partner's division, department, or sectional system (if required).

Outbound UNH Envelope

The Outbound Envelope allows you to determine outbound parameters for the UNH (EDIFACT) option. The Outbound UNH Envelope dialog box is displayed.

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

The following describes the parts of the Outbound UNH Envelope.

Table 3. Outbound UNH Envelope parts

Part	Description
Message Reference Number (UNH01)	Enter a unique reference number assigned by your company.
Message Type (UNH0201)	Enter the message type as defined for the Partner ID.
Version Number (UNH0202)	Enter the version number of the message type in the functional group. For example, "92" for version "92.1."
Version Release Number (UNH0203)	Define the release number of the current version number. For example, "1" for version "92.1."
Controlling Agency (UNH0204)	Enter the code that identifies the agency controlling the specification, maintenance, and publication of the message type (for example, "UN"). This must contain three alphanumeric characters if you are using EDIFACT version 4 or later or two alphanumeric characters if you are using an EDIFACT version earlier than version 4.
Version Association Code (UNH0205)	Enter the code assigned by the association responsible for the design and maintenance of the message type.
Common Access Reference (UNH03)	Define the key that relates all subsequent transfers of data to this partner.
EDIFACT Syntax Version 4	See the table of parameters below. **Note:** If you type a version number earlier than version 4 in the Syntax Version box on the Outbound UHB Envelope dialog box, the system disables the version 4 fields in both the UNB and UNH dialogs and any data in those fields will not be saved when you exit the Outbound UNB Envelope dialog box.

Table 4. EDIFACT Syntax Version 4 parameters

Parameter Name	Definition
Service Code List Directory Version (UNH0206)	Version number of the code list directory
Message Type Sub-function (UNH0207)	Code identifying a sub-function of a message type.
Message Subset ID (UNH0501)	Coded identification of a message subset, assigned by its controlling agency. **Note:** This parameter is mandatory for EDIFACT version 4.
Message Subset Version Number (UNH0502)	Version number of this message subset.
Message Subset Release Number (UNH0503)	Release number within the message subset version number.
Message Subset Controlling Agency (UNH0504)	Code identifying the controlling agency.
Message Implementation ID (UNH0601)	Code identifying the message implementation guideline identification. **Note:** This parameter is mandatory for EDIFACT version 4.
Message Implementation Version Number (UNH0602)	Version number of this message implementation guideline.
Message Implementation Release Number (UNH0603)	Release number within the message implementation guideline version number.
Message Implementation Controlling Agency (UNH0604)	Code identifying the controlling agency.
Scenario ID (UNH0701)	Code identifying the scenario. **Note:** This parameter is mandatory for EDIFACT version 4.
Scenario Version Number (UNH0702)	Coded identification of the scenario's version number, assigned by its controlling agency.
Scenario Release Number (UNH0703)	Release number within the scenario's version number.
Scenario Controlling Agency (UNH0704)	Code identifying the controlling agency.

Outbound VDA Envelope Dialog Box

Use the Outbound VDA Envelope dialog box to assign values to be used with specific headers in VDA messages.

Use the Outbound VDA Envelope dialog box when you want to provide information to be included in the outbound interchange envelope using the Trading Partner information, rather than through the application file.

This diagram illustrates the Outbound VDA Envelope.

This table describes the fields on the Outbound VDA Envelope dialog box, as well as the length of each field.

Field Name	Field Length	Description
Supplier Number	9	An identification number assigned to a supplier by a customer. All fields of a record structure that contain the field Supplier Number are subject to data privacy protection. Data entries are left justified.
Customer Number	9	An identification number assigned to a customer by a supplier. All fields of a record structure that contain the field Customer Number are subject to data privacy protection. Data entries are left justified.
Sender Number	9	An identification number that the data sender arranges with the data receiver.
Receiver Number	9	An identification number that the data receiver arranges with the data sender.
Data Sender	9	An identification number that the data sender arranges with the data receiver.
Data Source Number	9	An identification number that the data source arranges with the data receiver.
Sub Suppliers	9	An identification number that is assigned to a sub supplier by a customer.
Sales Tax ID Recipient	20	An identification number of the national tax office for the recipient. This field is mandatory for delivery of goods within the European Union. Data entries are left justified.
Sales Tax ID Sender	20	An identification number of the national tax office for the sender. This field is mandatory for delivery of goods within the European Union. Data entries are left justified.
Payment Indication Number	6	A link between data transmission payment notification and real payments received. This includes the Check number and remittal number. Data entries are left justified.

Field Name	Field Length	Description
Comp. Reg. Number	25	An identification of the National Register of Business Names (Commercial Register) for the supplier. This field is mandatory for some European countries.
Carrier Number	9	The carrier data number of VDA message 4920. If relevant, the contents of this field will be identical to the contents of the field in record type 712, position 13.
Warehouse Keeper Code	1	A code that identifies the person who created the interchange.
Purpose Code	2	Not used in this release.

This table shows the fields of the Outbound VDA Envelope and the VDA message headers that the field is used with. An X indicates that the field is used with that VDA message and is required on the Outbound VDA Envelope dialog box.

Field Name	Message/Release Date						
	4905/ 1088	4905/ 0496	4906/ 0593	4907/ 0893	4908/ 0596	4913/ 1094	4915/ 1189
Supplier Number	X	X	X	X	X		X
Customer Number	X	X	X	X	X		X
Sender Number							
Receiver Number							
Data Sender						X	
Data Source Number						X	
Sub Suppliers						X	
Sales Tax ID Recipient			X		X		
Sales Tax ID Sender			X		X		
Payment Indication Number				X			
Comp Reg. Number					X		
Carrier Number						X	
Warehouse Keeper Code						X	
Purpose code							

Chapter 12. Acknowledgements

Defining Inbound Acknowledgement Criteria

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

About this task

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

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

To define criteria to generate acknowledgements, complete the following steps.

Procedure

1. Define document acknowledgement criteria when you set up the partner relationship. Select the Advanced options on the Inbound Relationship Dialog Box.

   Note: If you select Immediate acknowledgement processing, acknowledgement reconciliation occurs during the inbound break session. If you select Deferred acknowledgement processing (the default), reconciliation occurs at its scheduled interval.
2. Define functional group acknowledgement criteria when you set up the Inbound Group Entry. Select the Advanced options on the Inbound Group Entry Dialog Box.
3. Define interchange acknowledgement criteria when you set up the Inbound Interchange Entry. Select the Advanced options on the Inbound Interchange Entry Dialog Box.

Defining Outbound Acknowledgement Criteria

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

About this task

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

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

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

Procedure

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

Procedure

1. Set the requirement for receiving interchange acknowledgements in the Advanced section of the Outbound Interchange Entry Dialog Box.

   Note: Do not change the translation objects in the Interchange Transl. Obj. and Acknowledge Transl. Obj. lists, unless you are certain of the result.
2. Set the requirement for receiving functional group acknowledgements in the Advanced section of the Outbound Group Entry Dialog Box.

   Note: If the acknowledgement is overdue (it is not received within the number of hours designated in the Hours Overdue box), it is indicated with a status of Overdue on the Interchanges Browser.
3. Set the requirement for receiving transaction set acknowledgements in the Advanced section of the Outbound Relationship Dialog Box, as illustrated below.

Manually Acknowledging Documents

The Acknowledge function does not generate an acknowledgement; it merely changes the status of the outbound document.

About this task

The status of a document in the Out Drawer browser may need to be manually set to Acknowledged for many reasons. For example, you have contacted a partner about an overdue document, and that partner verified that it was received but they are not sending you an acknowledgement.

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

Procedure

1. From the appropriate area of The Desk, select **Out Drawer**.

   The Out Drawer Summary dialog box is displayed.
2. Select the type of document for the appropriate partner and click **View**.

   The system displays the Out Drawer Browser.
3. Select an unacknowledged document that needs to be acknowledged.

   Note: Unacknowledged documents are marked with one of these states:
   - Overdue
   - Waiting

- Sent
- OnNet
- PickedUp
- NetErr
- NetWarn

4. Click **Ack**.

   The system sets the status of the document to "Ack'd."

Checking for Overdue Acknowledgements

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

About this task

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

To check for overdue acknowledgements, complete the following steps.

Procedure

Select **Commands > Overdue Check**.
The system checks if any interchange, group, or document that requires an acknowledgement is overdue (the system has not received an acknowledgement for it and the specified time to do so has expired). For any overdue interchange, group, or document, the system sets the status to Overdue on the Interchanges Browser.

Obtaining the Sender ID and Receiver ID (for EDIFACT)

About this task

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

Procedure

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

   The system displays the Partner Editor Dialog Box.
2. Select the **Outbound Control Build** relationship from the Select a Partner list and click **Outbound**.

   The system displays the Outbound Relationship Dialog Box for that partner.
3. On the Outbound Relationship dialog box, click **Translation**.

   The system displays the Outbound Translation Object Dialog Box.
4. From the Import list, select **ACKBUILD_CONTRL_DLL**.

   Note: The default translation object selected for the Outbound Control Build relationship is the ACKBUILD_CONTRL.
5. Click **Save** to save your selections and return to the Outbound Relationship dialog box.

Chapter 13. Document Tracking

Tracking Inbound Information

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

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

Process File Process

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

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

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

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

Mailbox Process File Process

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

Stage	Description
1	Your trading partner creates a data file (in which ContentType is set to Application/EDI. An associated message ID is created in the Outbox.

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

Export Process

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

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

Tracking Outbound Information

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

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

Import Process

Data is imported using the following process:

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

Mailbox import process

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

Stage	Description
1	When outbound data flows through the system, the Collection Mailbox creates a data file and an associated message ID in its Outbox (with ContentType set to Application/Import).
2	The Collection Mailbox sends it to your Application Inbox, creating a new target message ID. **Note:** For a Mailbox Import, you must specify the UNC path and file name on the System Configuration Imports tab. This specification must exactly match the path you set for the TRANSIN directory on the System Configuration Directories tab.
3	The CommMgr recognizes the content type as Application/Import and initiates the import of this file.
4	The CommMgr stores the external data reference in the ExtData_tb and then builds the unattended processing session file (with the new GDW_MBImport command) to import the data into Sterling Gentran:Server.
5	After the session file is created, unattended processing creates the IPC file and writes the external data information that the Translator needs to perform an import.
7	The Translator runs the import map stores tracking information in the ExtDataXref_tb.

Send Process

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

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

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

Viewing and Printing Data Audit Information

Typically, you view data audit (document tracking information that is available for a single document) to get information to help resolve a problem with a document. These records can be viewed from any of the document browsers.

About this task

To view or print data audit information, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select the desired browser.
2. To access the browser containing those documents, select the type of document for the appropriate partner and click **View**.
3. Select a single document and select **Commands > View**.

   The system displays the View Choice Dialog Box.
4. Select **Data Audit** and click **OK**.

   The system displays a Document Audit window for that document.

   Note: The Document Audit window contains the audit messages specific to the selected document. The information in this window includes the severity of the message, event ID, event name, audit number, user name, machine name, and message.
5. To print the displayed data audit information, select **File > Print**.
6. Click **Close** to exit the Tracking window.

Viewing and Printing Tracking Information

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

About this task

To view or print tracking information, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select the desired browser.
2. To access the browser containing those documents, select the type of document for the appropriate partner and click **View**.
3. Select a single document and select **Commands > View**.

   The system displays the View Choice Dialog Box.
4. Select Tracking Information and click **OK**.

   The system displays a Tracking Information window for that document.

   Note: The Tracking Information window contains an entry for each set of correlated files. If there are more events than can be displayed in the window, a scroll bar enables you to view the remaining records.
5. To print the displayed tracking information, select **File > Print**.
6. Click **Close** to exit the Tracking window.

Chapter 14. Archive and Restore

Archiving Data

About Archiving

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

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

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

The Archive feature enables you to archive the following types of data:
- Inbound and outbound interchanges (Sterling Gentran:Server EDI)
- Mailbox messages (and any corresponding attachments)
- External data

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

Archive Definitions

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

See Creating an Archive Definition for more information.

The Archive Process

The following table describes the archive process:

Stage	Description	
1	Define the archiving parameters (*.ARD file). The archive parameters available depend on the type of data you are archiving.	
	If you archive	**Then the available archive parameters are**
	Sterling Gentran:Server EDI	- partner profile ID - whether the interchange is inbound or outbound - age - processed status - network status - acknowledgement status
	Mailbox messages	- mailbox (a particular mailbox or all mailboxes) - location (Inbox, Outbox, or both) - age - status - content type
	external data	- action taken - age
2	Execute the archive process, which creates the archive files (*.ARV) in the Archive folder. **Note:** This definition can be run interactively or on a scheduled basis via Process Control.	
3	In the archive process, the system copies (or removes) data both from the database tables and the system data store.	

Archive Manager

The Archive Manager is the facility through which you archive and restore data.

The Archive Manager enables you to view the following.
- archive definition files
- summary data about the control information that was archived
- the detailed contents of the data stored in the archive data file

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

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

Archived Information

The Archive Manager retains extensive data for the information you archive and enables you to easily view it. The user interface uses a tree structure that displays the hierarchical levels of the archived data. This table lists the information available for each level of the archive entry for Sterling Gentran:Server EDI, mailbox, and external data.

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

If you select the	Then you can view
archive file at the Sterling Gentran:Server EDI, mailbox, or external data level	summary information, including the following: • date and time the archive started • date and time the archive ended • number of items archived • number of items deleted (if any)
interchange	summary information, including the following: • partner profile ID • direction • date and time • interchange control number
	data audit
	tracking information
group	summary information, including the following: • group control number • functional group ID • group control key
document	summary information, including the following: • transaction ID • transaction control number • document name
	data audit
	tracking information
mailbox	N/A
Inbox/Outbox	N/A
message	summary information, including the following: • series ID • message ID • source ID • content type • sender ID/recipient ID • sender name/recipient name • sender mailbox e-mail/recipient mailbox e-mail • subject • status • time message created
	data audits

If you select the	Then you can view
attachment	summary information, including the following: • attachment ID • content type • filename
	data audits
	file, which is viewed either in an external viewer (the default viewer is Notepad) or on screen in the Archive Manager. **Note:** When viewing raw-EDI or external data, you can switch from text to hex format by selecting the appropriate command from the View menu.
external data	any one of the following: • external data type • external data key • action • date and time of action • original filename
	data audits
Upper-right pane	any one of the following, depending on the level and type of the selection: • file information (start, end, number of items archived, and if any items were deleted) • interchange information • group information • document information • message information • attachment information • external data information • data audit information • tracking information
Lower-right pane	the content of the selected attachment.

The Archive Manager Dialog Box

The following illustrates the Archive Manager, shown with the Archive tree expanded and a Mailbox message selected:
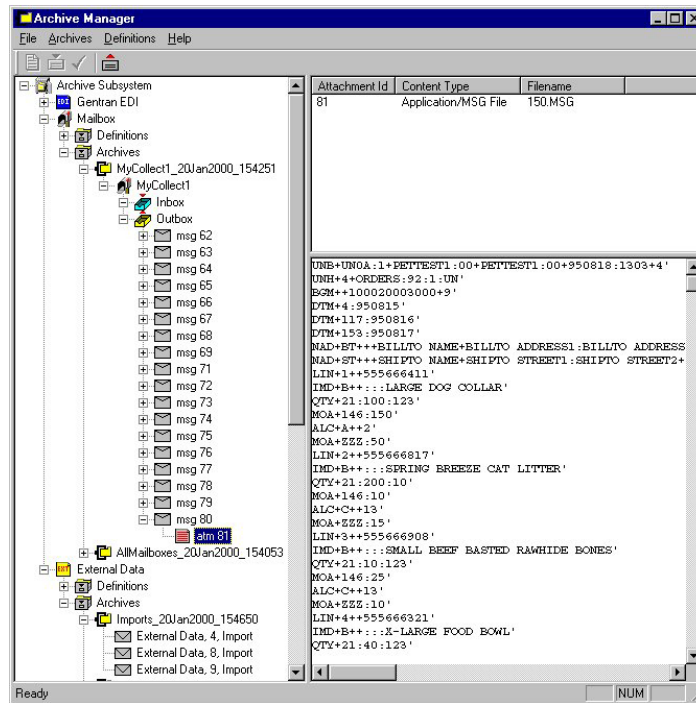
The following describes the parts of the Archive Manager.

Part	Function
File menu	Exit Archive Manager.
Archives menu	Contains the following options: • Restore data. • Mark data for restoration (single item or all items). • Unmark data (single item or all items). • Refresh (archive-level). • View data audits at the interchange, document message, or external data level. • View data audits and data at the interchange, document, attachment, or external data level. • Delete archive files. • Search for specific archived data. • Select how you want the Archive data sorted.
Definitions menu	Contains the following options: • Create new archive definition. • Edit or delete archive definition. • Archive data.
Help menu	Access Archive Help and information about the Archive Manager.
(icon)	Create new archive definition.
(icon)	Archive data.
(icon)	Mark selected item to be restored to the system.

Part	Function
	Restore marked data to the system.
Left pane	Archive, view, and restore data.
Upper right pane	The display depends on the level and type of the selection, but may contain any one of the following: • file information (start, end, number of items archived, and if any items were deleted) • interchange information • group information • document information • message information • attachment information • external data information • data audit information • tracking information
Lower right pane	Displays the content of the selected interchange, document, attachment, or external data file.

EDI Archive Definition Dialog Box

Use the EDI Archive Definition dialog box to create archive definitions for EDI data.

The following illustrates the Sterling Gentran:Server EDI Archive Definition dialog box:
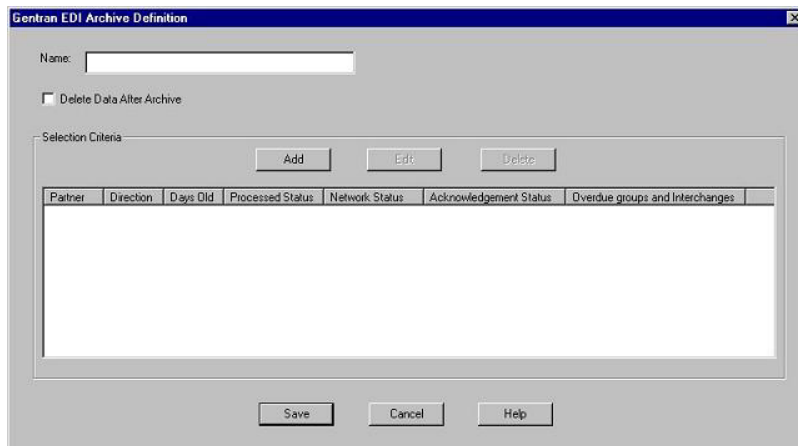
The following describes the parts of the EDI Archive Definition dialog box.

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

Part	Function
Edit	Accesses the Mailbox Selection Criteria Dialog Box for the selected criteria and enables you to modify the archive criteria.
Delete	Deletes the selected EDI criteria from the system. **Important:** The system removes the criteria without prompting you to confirm the deletion.
Partner	Displays the partner profile ID.
Direction	Displays the direction of the interchanges.
Days Old	Displays the age of the interchanges.
Processed Status	Displays the processed status of the interchanges. The default is All.
Network Status	Displays the network status of the interchanges. The default is All.
Acknowledgement Status	Displays the acknowledgement status of the interchanges. The default is All.
Overdue groups and Interchanges	Displays whether overdue groups and interchanges are archived. The default is No.

Interchange Selection Criteria Dialog Box

Use the Interchange Selection Criteria dialog box to specify which interchanges should be archived.

The following illustrates the Interchange Selection Criteria dialog box:

The following describes the parts of the Interchange Selection Criteria dialog box.

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

Part	Function
Processed Status	Select the processed status of the interchanges that are to be archived. Valid values: • All (default) • Received • Sent • ReadyToSend • Queued • Held • SendFailed
Network Status	Select the network status of the interchanges that are to be archived. Valid values: • All (default) • NotSent • ReceivedOK • ReceivedWarning • ReceivedError • PickedUp • ThirdParty
Ack Status	Select the acknowledgement status of the interchanges that are to be archived. Valid values: • All (default) • ReconcileNotRequired • ReconcileWaiting • ReconciledOK • ReconciledErrors • ReconciledPartial • ReconciledReject • ReconcileOverdue

Interchange Search Dialog Box

You can use the Interchange Search dialog box to search for interchanges, including those that have been archived.

The following illustrates the Interchange Search dialog box:

The following describes the parts of the Interchange Search dialog box.

Part	Function
Partner	Select a partner profile ID (default is All).
Direction	Choose Both (inbound and outbound), Inbound, or Outbound.
Control No.	Specify a control number.
Inbound Criteria	
Received Between	Define a range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format) for received interchanges.
Outbound Criteria	
Processed Status	Select the processed status of the interchanges to search for. Valid values: • All (default) • Received • Sent • ReadyToSend • Queued • Held • SendFailed
Network Status	Select the network status of the interchanges to search for. Valid values: • All (default) • NotSent • ReceivedOK • ReceivedWarning • ReceivedError • PickedUp • ThirdParty

Part	Function
Ack Status	Select the acknowledgement status of the interchanges to search for. Valid values: • All (default) • ReconcileNotRequired • ReconcileWaiting • ReconciledOK • ReconciledError • ReconciledPartial • ReconciledReject • ReconcileOverdue
Sent Between	Define a range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format) for sent interchanges. **Note:** Click the arrow to access the calendar control.
Find	Finds the appropriate interchanges based on the criteria you selected and displays them in the Search Results Dialog Box.

Group Search Dialog Box

You can use the Group Search dialog box to search for groups, including those that have been archived.

The following illustrates the Group Search dialog box:
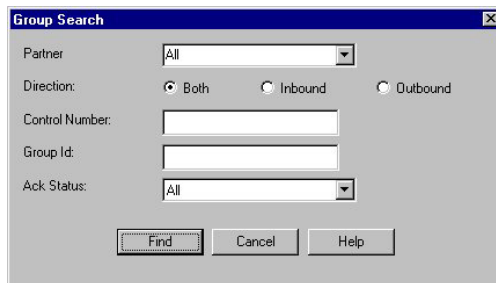
The following describes the parts of the Group Search dialog box.

Part	Function
Partner	Select a partner profile ID (default is All).
Direction	Choose Both (inbound and outbound), Inbound, or Outbound.
Control No.	Specify control number.
Group ID	Specify group identifier.
Ack Status	Select the acknowledgement status of the groups to search for. Valid values: • All (default) • ReconcileNotRequired • ReconcileWaiting • ReconciledOK • ReconciledErrors • ReconciledPartial • ReconciledReject • ReconcileOverdue

Part	Function
Find	Finds the appropriate groups based on the criteria you selected and displays them in the Search Results Dialog Box.

Document Search Dialog Box

You can use the Document Search dialog box to search for interchanges, including those that have been archived.

The following illustrates the Document Search dialog box:

The following describes the parts of the Document Search dialog box.

Part	Function
Partner	Select a partner profile ID (default is All).
Direction	Choose both (inbound and outbound), Inbound, or Outbound.
Control Number	Specify a control number.
Trans ID	Specify a transaction identifier.
Ref Data	Specify the reference data from the translation object.
Document Name	Specify the document name established for the translation object.
Ack Status	Select the acknowledgement status of the documents to search for. Valid values: • All (default) • Received • ReconcileWaiting • ReconciledOK • ReconciledErrors • ReconciledPartial • ReconciledReject • ReconcileOverdue
Exact Match	Searches for an exact match of the field, instead of a partial match (the default).
Find	Finds the appropriate documents based on the criteria you selected and displays them in the Search Results Dialog Box.

Mailbox Archive Definition Dialog Box

You can use the Mailbox Archive Definition dialog box to specify what messages in a mailbox should be archived.

The following illustrates the Mailbox Archive Definition dialog box:

The following describes the parts of the Mailbox Archive Definition dialog box.

Part	Function
Name	Specify the name of the archive definition file. **Note:** This name must be unique.
Delete Data After Archive	Tell the system to remove the message data after archiving it.
Add	Accesses the Mailbox Selection Criteria Dialog Box and enables you to define new archive criteria.
Edit	Accesses the Mailbox Selection Criteria Dialog Box for the selected mailbox criteria and enables you to modify the archive criteria.
Delete	Deletes the selected mailbox criteria from the system. **Important:** The system removes the criteria without prompting you to confirm the deletion.
Mailbox	Displays the mailbox name.
Location	Displays the location of the messages.
Days Old	Displays the age (in days) of the messages to be archived.
Status	Displays the status of the messages that are to be archived. The default is All.
Content type	Displays the content type of the messages. The default is Any.

Mailbox Selection Criteria Dialog Box

Use the Mailbox Selection Criteria dialog box to specify which mailbox data should be archived.

The following illustrates the Mailbox Selection Criteria dialog box:

The following describes the parts of the Mailbox Selection Criteria dialog box.

Part	Function
Mailbox	Select a mailbox (default All).
Location	Choose Both (Inbox and Outbox), Inbox, or Outbox.
Days old	Specify the age (in days) of the messages to be archived.
Status	Select the status of the messages that are to be archived. Valid values: • All (default) • Delivered • Picked Up • Read • Sent • Sent Third Party
Content type	Select the content type of the messages. Valid values: • Any (default) • Application/EDI • Application/Document-EDI • Application/Import • Application/RosettaNet-agent (only if Sterling Gentran:Server for RosettaNet is installed) **Note:** This edit box allows you to enter any content type you created.

Mailbox Search Dialog Box

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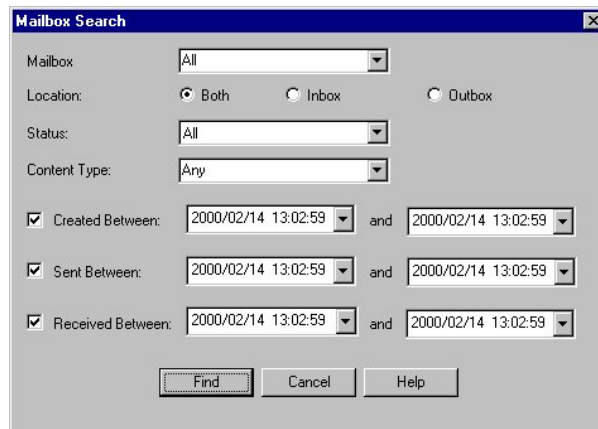
The following lists the parts of the Mailbox Search dialog box and their functions:

Part	Function
Mailbox	Select a mailbox (default is All).
Location	Choose Both (Inbox and Outbox), Inbox, or Outbox

Part	Function
Status	Select the status of the messages to be archived. Valid values: • All (default) • Sent • Read • Delivered • Picked Up • Sent Third Party
Content type	Select the content type of the messages. The default is Any, but you can type in any content type you have created.
Created Between	Define a created between range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format). **Note:** Click the arrow to access the calendar control.
Sent Between	Define a sent between range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format). **Note:** Click the arrow to access the calendar control.
Received Between	Define a received between range of dates and times to search (in YYYY/MM/DD and HH:MM:SS format). **Note:** Click the arrow to access the calendar control.
Find	Finds the appropriate messages based on the criteria you selected and displays them in the Search Results Dialog Box.

External Data Archive Definition Dialog Box

Use the External Data Archive Definition dialog box to create archive definitions for external data.

The following illustrates the External Data Archive Definition dialog box:
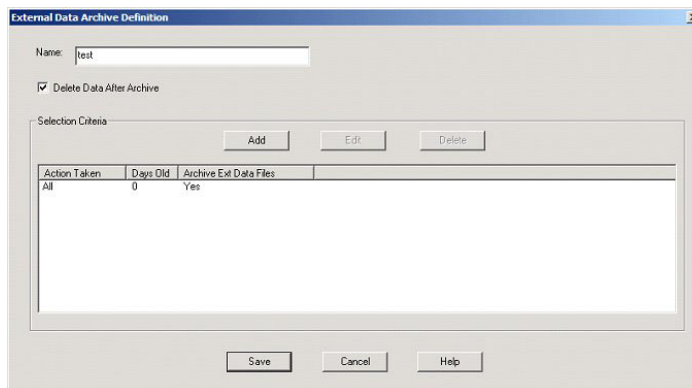
The following describes the parts of the External Data Archive Definition dialog box.

Part	Function
Name	Specify the name of the archive definition file. **Note:** This name must be unique.
Delete Data After Archive	Tell the system to remove the message data after archiving it. This is selected by default.
Add	Accesses the External Data Selection Criteria Dialog Box and enables you to define new archive criteria.

Part	Function
Edit	Accesses the External Data Selection Criteria Dialog Box for the selected mailbox criteria and enables you to modify the archive criteria.
Delete	Deletes the selected external data criteria from the system. **Important:** The system removes the criteria without prompting you to confirm the deletion.
Action Taken	Displays the action taken on the external data file. Value values: • All (default value) • ProcessFile • MBProcessFile • Import • MBImport • Send • Export
Days old	Displays the age (in days) of the external data files to be archived.
Archive Ext Data Files	Displays the archived external data files.

External Data Selection Criteria Dialog Box

The following illustrates the External Data Selection Criteria dialog box:

The following describes the parts of the External Data Selection Criteria dialog box.

Part	Function
Action Taken	Select the action to be taken on the external data file. Value values: • All (default value) • ProcessFile • MBProcessFile • Import • MBImport • Send • Export
Days old	Specify the age (in days) of the external data files to be archived.
Archive Files	Indicate that the external data files will be archived.

External Data Search Dialog Box

The following illustrates the External Data Search dialog box:

The following describes the parts of the External Data Search dialog box.

Part	Function
Action Taken	Select the action to be taken on the external data file for which to search. Value values: • All (default) • ProcessFile • MBProcessFile • Import • MBImport • Send • Export
Action Performed Between	Define a range of dates and times on which to search, defining when the action was performed on the external data file (in YYYY/MM/DD and HH:MM:SS format). **Note:** Click the arrow to access the calendar control.
Original Filename	Specify the original name of the external data file for which to search.
External Data Key	Specify the external data key for which to search.
Exact Match	Searches for an exact match of the field, instead of a partial match (the default).
Find	Finds the appropriate messages based on the criteria you selected and displays them in the Search Results Dialog Box.

Search Results Dialog Box

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

Search Results

Archive Name	Mailbox	Message Id	Location	Time Created	
\\RTETTENH...	MyCollect1	62	Outbox	01/06/00 15:15:04	
\\RTETTENH...	MyCollect1	63	Outbox	01/06/00 15:15:05	
\\RTETTENH...	MyCollect1	64	Outbox	01/06/00 15:15:06	
\\RTETTENH...	MyCollect1	65	Outbox	01/06/00 15:15:09	
\\RTETTENH...	MyCollect1	66	Outbox	01/06/00 15:15:14	
\\RTETTENH...	MyCollect1	67	Outbox	01/06/00 15:15:16	
\\RTETTENH...	MyCollect1	68	Outbox	01/06/00 15:15:17	
\\RTETTENH...	MyCollect1	69	Outbox	01/06/00 15:15:18	
\\RTETTENH...	MyCollect1	71	Outbox	01/06/00 15:15:25	
\\RTETTENH...	MyCollect1	72	Outbox	01/06/00 15:15:26	
\\RTETTENH...	MyCollect1	73	Outbox	01/06/00 15:15:27	
\\RTETTENH...	MyCollect1	74	Outbox	01/06/00 15:15:28	
\\RTETTENH...	MyCollect1	75	Outbox	01/06/00 15:15:33	
\\RTETTENH...	MyCollect1	76	Outbox	01/06/00 15:15:34	
\\RTETTENH...	MyCollect1	77	Outbox	01/06/00 15:15:35	
\\RTETTENH...	MyCollect1	78	Outbox	01/06/00 15:15:36	
\\RTETTENH...	MyCollect1	79	Outbox	01/06/00 15:15:45	
\\RTETTENH...	MyCollect1	80	Outbox	01/06/00 15:15:47	
\\RTETTENH...	MyCollect1	62	Outbox	01/06/00 15:15:04	
\\RTETTENH...	MyCollect1	63	Outbox	01/06/00 15:15:05	
\\RTETTENH...	MyCollect1	64	Outbox	01/06/00 15:15:06	
\\RTETTENH...	MyCollect1	65	Outbox	01/06/00 15:15:09	
\\RTETTENH...	MyCollect1	66	Outbox	01/06/00 15:15:14	
\\RTETTENH...	MyCollect1	67	Outbox	01/06/00 15:15:16	
\\RTETTENH...	MyCollect1	68	Outbox	01/06/00 15:15:17	
\\RTETTENH...	MyCollect1	69	Outbox	01/06/00 15:15:18	
\\RTETTENH...	MyExtract1	70	Inbox	01/06/00 15:15:04	
\\RTETTENH...	MyCollect1	71	Outbox	01/06/00 15:15:25	
\\RTETTENH...	MyCollect1	72	Outbox	01/06/00 15:15:26	
\\RTETTENH...	MyCollect1	73	Outbox	01/06/00 15:15:27	

[Mark All] [Previous] [Next]

[Mark\Unmark] [Help] [Close]

The following describes the parts of the Search Results dialog box.

Part	Function
(list)	Displays context-specific information, depending on whether you searched for interchanges, groups, documents, messages, or external data.
Mark All	Marks all items in the Search Results dialog box to be restored.
Previous	Selects the previous item in the list. **Note:** This button is only enabled if you select an archive file.
Next	Selects the next item in the list. **Note:** This button is only enabled if you select an archive file.
Mark/Unmark	Flags the selected item to be restored (or deselect a previously selected item). **Note:** This button is only enabled if you select an archive file.

Archive Preferences Dialog Box

The archive Preferences dialog box allows you to select the sort order of the data in the Archive tree view and to defer the delete phase of the archive process.

To access the archive Preferences dialog box, select Preferences from the Archive Manager menu.

Note: Also, see "Creating an Archive Definition" on page 176.

The following diagram shows the archive Preferences dialog box:

The following table describes the parts of the archive Preferences dialog box:

Part	Function
Select how you want your archives sorted in the display	Select one of the following methods for sorting: • Date/Time • Filename
Set Archive Wait Timer	When you have selected **Delete** in the archive definition, the system attempts to suspend Process Control events to ensure that there are no conflicts with any database activity. This parameter allows you to delay only the deletion of the data and only if an active event is running. If the system cannot suspend all events, it will wait for the specified time and try again. Only one re-attempt will occur. If the system still cannot suspend the events, a message displays stating that the delete could not be performed because the Process Control events could not be suspended. In addition, a message is written to the audit log. However, the archive session will complete. **Note:** This option is not activated by default.
Time Interval (minutes)	Specify a time between 1 and 1440 minutes (24 hours) that the archive process waits to delete data. **Notes:** • This option is only available when the Set Archive Wait Timer is selected. • If you enter a number outside the range, the system will display an error message.

Creating an Archive Definition

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

About this task

To create an archive definition file, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Archive**.

   The system displays the Archive Manager.

2. Expand the Archive tree.

   Note: This is necessary to create a new archive definition.

3. Depending on what type of archive definition you want to create, right-click **Definitions** under EDI, Mailbox, or External Data, and select **New**.

   The system displays the EDI Archive Definition Dialog Box, the Mailbox Archive Definition Dialog Box, or the External Data Archive Definition Dialog Box.

4. In the Name box, type the name of the archive definition.

5. To remove the data from the system after archiving it, select **Delete Data After Archive**.

   Note: You can specify a wait timer for the archive process to delay the delete action. See "Archive Preferences Dialog Box" on page 175 for details.

6. Click **Add**.

   The system displays the appropriate Selection Criteria dialog box.

7. Complete the appropriate parameters.

   See the following for more information:

   - Interchange Selection Criteria Dialog Box
   - Mailbox Selection Criteria Dialog Box
   - External Data Selection Criteria Dialog Box

   Note: All elements on the Selection Criteria dialog boxes are automatically set to the defaults, which results in the archival of all data.

8. Click **Save**.

   The system exits the Selection Criteria dialog box.

   To create additional archive criteria, repeat Steps 6 through 8.

9. Click **Save** on the appropriate Archive Definition dialog box.

   The system creates an archive definition file that contains the archive parameters. The definition file is stored with an .ARD extension.

10. To edit the archive criteria, select the item on the appropriate Archive Definition dialog box and click **Edit**.

11. To delete archive criteria, select the item on the appropriate Archive Definition dialog box and click **Delete**.

Archiving Data
Before you begin

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

Use your company's computer backup process to back up the Sterling Gentran:Server system before executing the archive process.

About this task

Note: The system naming convention for creating the archive files uses the same name of the archive definition file, plus the unique date and time of archival, with an .ARV file extension.

To archive data, complete the following steps:

Procedure

1. From the appropriate area of The Desk, select **Archive**.

   The system displays the Archive Manager.
2. Expand the archive tree and open the appropriate Definitions folder.
3. Right-click the appropriate archive definition and select **Archive Data**.
   * The system executes the archive process. An interactive progress dialog box displays the current state of the archive process and enables you to cancel the archive, if necessary.
   * The system archives the data by the parameters you specified and creating a new file in the Archives folder.
4. When the archive process is complete, right-click the appropriate Archive folder in the Archive Manager tree view and select **Refresh**.

   The system displays the archive file along with the date and time on which the archive data file was created.

Viewing Archived Data
About this task

To view archived information, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Archive**.

   The system displays the Archive Manager.
2. Expand the archive tree and open the appropriate Archives folder.
3. In the Archive folder, locate the archive data file for which you want to view the contents (summary or detailed) or search for a specific piece of data, and click the **+** to the left of that file.

   The system displays the archived files. When you select an archive file, the system displays summary information for each item.
4. Select **Archive > Preferences**, choose how you want your archive data sorted in the Archive tree view, and click **OK**.
5. To view additional information, select the appropriate level of the tree and do one of the following:
   * To view the archive file information, select the archive file.
   * To view the interchange information, select the interchange.
   * To view the interchange data audit, right-click the interchange and select **View > Data Audits**.
   * To view the interchange tracking information, right-click the interchange and select **View > Tracking Info**.
   * To view the interchange file, right-click the interchange and select **View > Data > External Viewer**.

- To view the interchange file, right-click the interchange and select **View > Data > Screen**.
- To view the group information, select the group.
- To view the document information, select the document.
- To view the document data audit, right-click the document and select **View > Data Audits**.
- To view the document tracking information, right-click the document and **View > Tracking Info**.
- To view the document file, right-click the document and select **View > Data > External Viewer**.
- To view the document file, right-click the document and select **View > Data > Screen**.
- To view the message information, select the message.
- To view the message data audit, right-click the message and select **View > Data Audits**.
- To view the attachment information, select the attachment.
- To view the attachment data audit, right-click the attachment and select **View > Data Audits**.
- To view the attachment file, right-click the attachment and select **View > Data > External Viewer**.
- To view the attachment file, right-click the attachment and select **View > Data > Screen**.
- To view the external data information, select the external data file.
- To view the external data audit, right-click the external data file and select **View > Data Audits**.
- To view the external data file, right-click the external data file and select **View > Data > External Viewer**.
- To view the external data file, right-click the external data file and select **View > Data > Screen**.

Searching Archived Data

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

About this task

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

Procedure

1. From the appropriate area of The Desk, select **Archive**.

   The system displays the Archive Manager.

2. From the Archive Subsystem tree, select the appropriate Archives folder (Gentran EDI, Mailbox, or External Data).

3. From the **Archives** menu, select **Search** and then select one of the following:
   - Message
   - Interchange
   - Group

- Document
- External Data

4. Select the appropriate parameters.

   Note: If you do not change any parameters on a search dialog box, the system finds the default (all items).

5. Click **Find** to execute the search.

   The system displays the Search Results Dialog Box.

6. Click **Close** to exit the Search Results dialog box.

Restoring Archived Data

About Restoring Archived Data

The Restore feature enables you to view and reprocess data via the Restored Interchanges browser. This feature copies data from an archive data file back to the active system.

When data is restored, the archive data file (*.ARV file) is not altered. You can restore data from the same archive file again, if you wish. For restored interchanges, you can then view the data in the Restored Interchange browser and reprocess it, if necessary.

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

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

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

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

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

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

Restoring Archived Data
About this task

To restore archived data, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Archive**.

   The system displays the Archive Manager.

2. Expand the archive tree and locate the item that you want to restore.

3. Right-click the item and select **Mark\Unmark**.

The system flags that item for restoration.

4. Click **Restore Data**.

   The marked data is restored to your system.

   Note: If the system is unable to restore data, you are prompted to view the Audit Log for detailed information about why the failure occurred.

5. Do one of the following:
   - You can view a restored interchange in the Restored Interchanges browser.
   - You can view a restored message in the mailbox subsystem.
   - You can view a restored external data file in the External Data Summary viewer.

Restored Interchanges Browser

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

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

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

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

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

The following illustrates the Restored Interchanges browser:
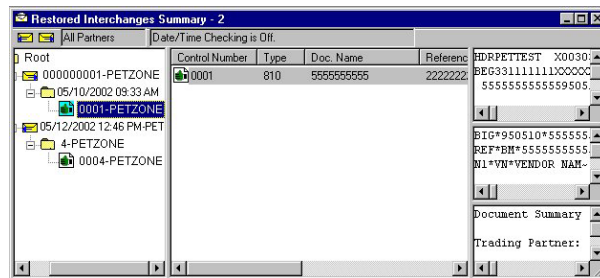
The following describes the parts of the Restored Interchanges browser.

Part	Function
Status bar	Reflects the filer specifications from the Interchange Filter Dialog Box. **Note:** The Electronic Commerce Manager status bar is updated when you select a single item from the middle pane.

Part	Function
left pane - Interchanges tree	Displays a list of all the restored interchanges, groups, and documents. Also displays the time created and partner name. **Note:** To refresh the display of the Restored Interchanges browser, press F5.
middle pane - detailed list	Displays detailed information about the document, group, or interchange selected. The information displayed depends on the level. **Notes:** • To select multiple items, press and hold the CTRL key while selecting the items. • To refresh the display of the Interchanges browser, right-click the middle pane and select Refresh from the shortcut menu (or press F5).
upper right pane - External Data	Displays the data file used in translation (when selected from the View > Restored Interchanges menu). **Notes:** • This option only available if a single item is selected from the detailed list. • This option is not available if the external data file used in translation does not exist. • When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
middle right pane - Gentran Data	Displays the data in EDI format when selected from the View > Restored Interchanges menu). **Notes:** • This option only available if a single item is selected from the detailed list. • When viewing raw-EDI or External Data, you can switch from Text to Hex format by selecting the appropriate command from the View menu.
lower right pane - Translator Report	Displays a report of the actions the translator took on this document and lists any EDI- or translation object-based compliance errors (when selected from the View > Restored Interchanges menu). **Note:** This option only available if a single item is selected from the detailed list. See Error Messages in the *IBM Sterling Gentran:Server for Microsoft Windows Administration Guide*, for a detailed explanation of translator reports.

Interchanges Hierarchy

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

Level	How to access	Information displayed (in middle pane)⌂(all information may not appear)
Interchange	Open Restored Interchanges browser	• direction of the interchange • date and time the interchange was created • partner name • control number • interchange process status • network status • interchange acknowledgement status • message status **Note:** If any of these components are missing or not appropriate for a particular interchange, they are not displayed.
Group	Double-click an interchange	• group control number • group type • group acknowledgement status **Note:** If any of these components are missing or not appropriate for a particular group, they are not displayed.
Document	Double-click a group	• document compliant status • document control number • document type • document name • reference data • document compliant status • transaction acknowledgement status **Note:** If any of these components are missing or not appropriate for a particular document, they are not displayed.
document data	Double-click a document **Note:** A screen entry translation object for that document must available on your system.	document data

Document Level Status Icons

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

Status	Icon	Description
OK		(green) - Indicates that the documents are fully compliant with the EDI standard and are eligible for further processing.

Status	Icon	Description
NotOK		(red) - Indicates one of the following: • The document failed to comply with the EDI standard. If this is the cause of the error, the errors will be indicated on a translator report associated with the document. Although the document is not fully compliant, it is eligible for further processing. • The received document could not be associated with a specific trading partner. If this is the case, the partner listed for the document will be Unknown. To associate this document and the other documents received in the interchange with a partner, attach the documents from the Interchange browser. • A suitable trading relationship or translation object could not be associated with the document. Detailed information concerning what information was used to locate the relationship and/or the translation object will be listed in the audit log. To correct this problem, a valid relationship must be established using the Partner Editor, and a valid export, print, or turn-around translation object must be defined for that relationship. • A major error occurred while processing the interchange, functional group, or transaction level enveloping structures. This error may include header and trailer control numbers that do not match, an invalid trailer control count, or a control number sequence checking error. If any of these errors occur, they will be listed on the translator report for the interchange containing the document
Duplicate		(yellow) - Indicates the document has the same name as another document on the system.

Viewing Restored Interchanges
About this task

To view restored interchanges, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Restored Interchanges**.

   The system displays the Restored Interchanges Browser.

2. To filter the display of interchanges by status, see Filtering the Display of Restored Interchanges.

   Note: The Filter function enables you to filter the display of restored interchanges by date, partner, and direction (inbound and outbound).

3. Select an interchange.

4. To view the content of a single selected interchange in raw EDI data format, select **View > Restored Interchanges > Gentran Data**.

   Note: When viewing raw-EDI or external data, you can switch from text to hex format by selecting the appropriate command from the View menu.

5. To view the corresponding external data file, select **View > Restored Interchanges > External Data**.

Note: When viewing raw-EDI or external data, you can switch from text to hex format by selecting the appropriate command from the View menu.

6. To view the translator report for a single selected interchange, select **View > Restored Interchanges > Translator Report**.

7. To print a selected interchange or a summary of interchanges, select **File > Print**.

8. To delete a selected interchange and all associated documents, select **Document > Delete**.

   Notes:
   - If you delete an interchange with a status of Queued, you receive a warning that you must remove specified messages from Out Documents and from your trading partner's Inbox. If you proceed, you are warned that if your partner bases processing results on control number sequencing, you should modify the transaction, group, and interchange control numbers.
   - If you delete an interchange with a status of Ready to send, you are warned that if your partner bases processing results on control number sequencing, you should modify the transaction, group, and interchange control numbers.

Filtering the Display of Restored Interchanges
About this task

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

Procedure

1. From the appropriate area of The Desk, select **Restored Interchanges**.

   The system displays the Restored Interchanges Browser.

2. Select **Commands > Filter**.

   The system displays the Interchange Filter Dialog Box.

3. To filter the display of interchanges by date and time, clear the No Date/Time Checking check box. Otherwise, select **No Date/Time Checking** and proceed with step 6.

4. Use the Date From slide bar to select the beginning of the date range from which the system should filter the display of interchanges.

5. To set the end date for the date range to the current system date and time, select **Always Current**. Otherwise, clear the Always Current check box and move the Date To slide bar to the end of the date range.

6. To filter the display of restored interchanges by partner, select the partners that you want displayed from the Partner list (which contains a list of all the partner profiles on your system).

   Note: The default display is all partners, but you can click partner profiles to unselect them and change the display. Alternately, you can click Unselect All Partners to clear all the partner profiles. You can then click one or more profiles to select them. At least one partner must be selected.

7. Specify the direction in which you want to filter the interchange.

   The default display is both inbound and outbound interchanges.

   Note: At least one of the Direction check boxes must be selected.

8. Click **OK**.

The system filters the restored interchange display based on the criteria you selected.

Viewing Restored Documents

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

About this task

To view the documents within a restored interchange, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Restored Interchanges**.

   The system displays the Restored Interchanges Browser.

2. Double-click a document to view it.

   Note: You must have a screen entry translation object for this document available on your system.

3. To view a translator report of the actions the translator took on this document, select **View > Interchanges > Translator Report**.

4. To view the content of a single selected interchange in raw EDI data format, select **View > Interchanges > Gentran Data**.

   Note: When viewing raw-EDI or external data, you can switch from text to hex format by selecting the appropriate command from the View menu.

5. To view the related external data of a single selected interchange, select **View > Interchanges > Related External Data**.When viewing raw-EDI or external data, you can switch from text to hex format by selecting the appropriate command from the View menu.

6. To print a selected document or translation report, select **File > Print**.

7. To delete a selected document, select **Document > Delete**.

8. To copy the document to the appropriate browser, select **Document > Copy**, then select the appropriate browser from the submenu. ?In Documents Browser or In Documents Browser for compliant Inbound documents. Workspace Browser for outbound documents.

Reprocessing Restored Documents

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

About this task

To reprocess data, complete the following steps.

Procedure

1. From the appropriate area of The Desk, select **Restored Interchanges**.

   The system displays the Restored Interchanges Browser.

2. Select the documents that you wish to copy to the Workspace Browser, In Documents Browser, or ?In Documents Browser so you can reprocess and/or resend them.

3. Select **Document > Copy**.
4. Select the appropriate browser from the cascading menu to copy the restored interchanges to that browser.

Resending Restored Interchanges

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

About this task

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

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

Stage	Description
1	The restored interchange is listed in the Restored Interchanges Browser.
2	When the resend command is executed, the system first determines if it is a TRADACOMS interchange. If the interchange is TRADACOMS, the system increments the current version number in the FIL segment by one. After this update, the interchange is resent in the same manner as all other interchanges.
3	Communication is established with the remote end. The status of the message is updated based on the success or failure of the communications session. • If the communication fails because there is no mailbox set up or because the Mailbox service is not started, the interchange and documents are left in a Ready to send status. • If communication fails because there is no modem, the interchange and documents are left in a Queued status. **Note:** No user action is required at this point. Interchanges that failed to send are automatically sent as part of the next transmission session.
4	After communication is successful, the documents are moved to the Out Drawer Browser and the interchange status is set to Sent.

To resend restored outbound interchanges, complete the following steps:

Procedure

1. From the appropriate area of The Desk, select **Restored Interchanges**.
   The system displays the Restored Interchanges Browser.
2. Select the outbound interchange that needs to be resent.
3. Select **Document > Resend**.
4. Click **Yes** to start the transmission session.

Chapter 15. Process Control

About Process Control

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

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

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

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

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

Stage	Description
1	Create a process control session. See Creating Sessions for more information.
2	Create a process control calendar (if necessary). See Creating and Editing Calendars for more information.
3	Create the process control event. See Creating New Events for more information.
4	Activate the event. See Activating and Suspending Events for more information.

Sessions

About Sessions

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

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

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

Commands

The following lists the script commands and their actions:

Command	Action
Exec_Program	Indicates a program for the system to run. **Note:** When this command is executed, the system writes an informational message to the Audit Log indicating which program (command line in working directory) was run.
Exec_Program_Ex	Indicates a program for the system to run and for which the system will pass the Event ID and controller name. **Note:** This function is used by the Sterling Gentran:Server for RosettaNet install program.
File_Copy	Copies a file. **Note:** When this command is executed, the system writes an informational message to the Audit Log indicating that the file copy was successful.
File_Rename	Changes the name of a file.
File_Delete	Removes a file from the system. **Note:** When this command is executed, the system writes an informational message to the Audit Log indicating that the deletion of the file was successful.
GDW_Archive	Performs the archive command according to the specifications of a selected archive definition file.
GDW_Audit_Rpt	Copies the audit records to a specified file.
GDW_Audit_Purge	Deletes all audit records in the system. **Note:** The purged Audit Log entries are removed from the database and appended to a text file. To ensure that the text file does not grow unchecked, you may want to use a File_Delete command prior to this command.
GDW_Audit_Write	Writes a processing user audit message to the Audit Log, based on the specified parameters.
GDW_Document_ Purge	Removes document records from the Sterling Gentran:Server database according to the specified age/date, location, partner name, transaction, and/or status.
GDW_Document_Rpt	Creates a specified file that contains document data (as well as group and interchange data, if applicable) for documents in the Sterling Gentran:Server database according to the specified status, location, and/or age/date.
GDW_Export	Performs the Export function and can perform the send mailbox function to enable the output of an inbound translation to be delivered back to the Mailbox Server Manager. **Note:** You must have an export translation object registered with the system.
GDW_ExtData_Delete	Deletes external data references based on the action taken on the external data and/or age.

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

The following lists the script conditions and their actions:

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

Process Control Dialog Box - Sessions Tab

The following illustrates the Sessions tab of the Process Control dialog box:
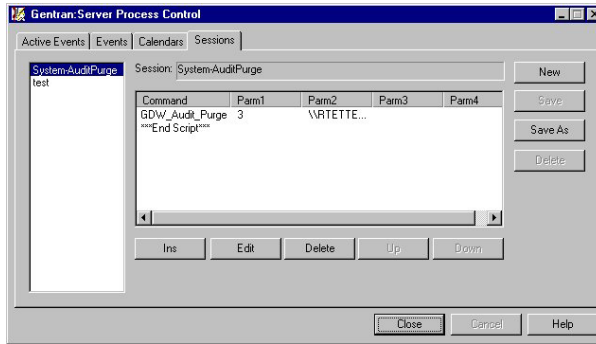
The following describes the parts of the Process Control dialog box Session tab.

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

Action Setup Dialog Box

The following illustrates the Action Setup dialog box:
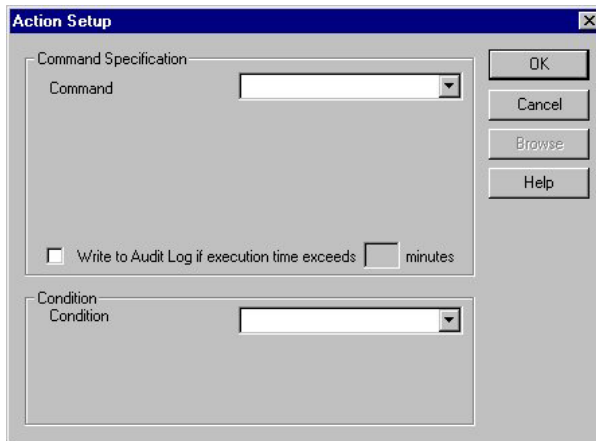
The following describes the parts of the Action Setup dialog box.

Part	Function
Command Specification	Select which command you want to add to the script. **Note:** Selecting a command allows you to access the parameters for that command, which the system displays in the Command Setup section.

Part	Function
Write to Audit Log if execution time exceeds	Specify that the system write an audit message if the command execution time exceeds the specified number of minutes (next field). **Note:** If a command exceeds the allotted time, the system writes a warning message to the Audit Log and the command continues to run until it completes.
minutes	Specify the number of minutes after which the system writes a message to the Audit Log if the command has not finished processing.
Condition	Select conditions for the command. These conditions determine whether or not the command is executed within the session. **Notes:** • Each script command can have an associated condition. These conditions are evaluated just prior to execution of the command and can be used to control the processing flow of your session. • If you select the "If file Below Exists" condition, you can use a wildcard (*) to specify the name of the file for which you want the system to check. • In the Result list, if you select **True**, you are indicating that the command should be executed only if there are documents in the specific location or if the file is present. If you select **False**, you are indicating that the command should be executed only if there are no documents in the specific location or if the specified file does not exist.

Creating and Editing Sessions

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

About this task

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

Procedure

1. On The Desk, click **Process Control**.

   The system displays the Process Control dialog box.
2. Click the **Sessions** tab.
3. To create a new session, do the following:
   a. Click **New**.
   b. In the Session Name box, type in the new session name, using alphanumeric characters.
   c. Click **OK** to add the new session.
4. Select your session and click **Ins** to insert a command above the current line.

   The system displays the Action Setup dialog box. This dialog box allows you to create script commands.
5. In the Command Specification section, do the following:
   a. From the Command list, select a command.
   b. Complete the boxes with the appropriate values.

c. To specify a limit on how long this command should process before the system writes a message to the Audit Log, select the check box and type the number of minutes in the box.

6. If you want to apply a condition, in the Condition section do the following:

   a. Select a condition from the list.

   b. Complete the boxes with the appropriate values.

7. Select **True** or **False** from the Result list.

8. Click **OK**.

   The command is saved and you return to the Process Control dialog box.

   Repeat Steps 1 through 13 until you finish adding commands to the session script.

   Notes:
   - If you need to resequence the commands in the script, use **Up** and **Down**.
   - If you need to edit a command in the script, select that command and click **Edit**.
   - If you need to delete a command from a script, select that command and click **Delete**.

9. Click **Save** to save the new session script.

10. Click **OK** to exit the Process Control dialog box.

Deleting Sessions

If an event calls a session that is currently processing or is activated, you are unable to delete the session until the event has either finished processing or you suspend the event.

About this task

To delete a session, complete the following steps.

Procedure

1. On The Desk, click **Process Control**.

   The system displays the Process Control dialog box.

2. Click the **Sessions** tab.

3. Select a session and click **Delete**.

4. Click **Yes** to delete the current selection.

5. Click **OK** to exit the Process Control dialog box.

Events

About Events

The Process Control enables you to process an event at a specified time, every day. Additional options enable you to restrict processing to certain days of the week or a specific date. In addition, you can define calendars to exclude specific holidays or days of the week from the processing schedule.

Events are a combination of the following:
- A time or day to execute or a filename for which the system checks
- The controller on which the event is processed

- A session definition

The Process Control runs events based on whether they are timed or polled. You define the events in a session definition.

You manage events by using the following dialog boxes:
- Process Control dialog box (Events tab)
- Event Setup dialog box
- Process Control dialog box (Active Events tab)

You must have already defined the session definition to be executed before creating an event.

When a timed event is activated, the Sterling Gentran:Server Scheduler initiates that event at the correct time on the appropriate day or date.

When a polled event is activated, the Sterling Gentran:Server Poller polls the controller for the presence or absence of a defined file (depending on what is indicated in the event definition), and initiates the event when the specified file either exists or does not exist (based on the event definition).

Process Control Dialog Box - Events Tab

The Sterling Gentran:Server Process Control dialog enables you to view all the events defined in your system.

On the Events tab, the following specifications are listed for each event:
- Event description
- Time
- Parameters (day of week if timed or result if polled)
- Controller on which the event runs
- Time started
- Time ended
- Session name
- Calendar name (timed events only)
- File name (polled events only)

You can filter the display of events on the Events tab by the controller on which the events are scheduled to run. You can also sort the events by description, controller, and status.

The Events tab enables you to change the status of an event by activating or suspending the event. The indicator in the far left column of the list on the Events tab registers the status of the event. The indicator can be one of the following colors:
- Red - The event is currently executing and you are not able to edit the event until processing completes.
- Yellow - The event is suspended (and is not processed until activated).
- Green - The event is activated for processing.
- Green with red x - The event is activated for processing but is currently blocked because the number of currently processing events is equal to the limit of events that may concurrently execute.

The following illustrates the Events tab of the Process Control dialog box:
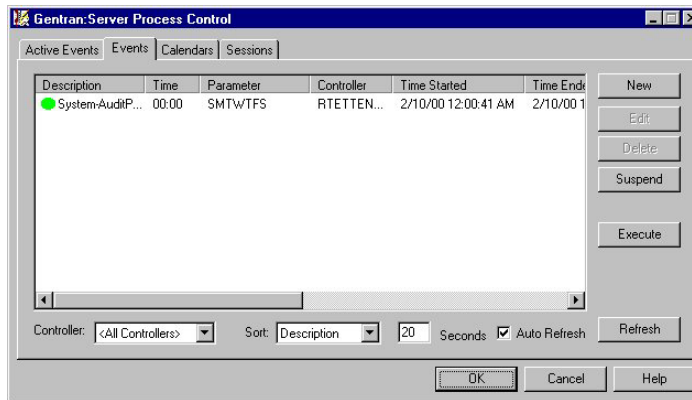
The following describes the parts of the Process Control dialog box Events tab.

Part	Function	
(list)	Displays all scheduled events.	
Controller	Select the controller whose events you want filtered.	
Sort	Select how you want the list of events sorted:	
	If you sort by...	**Then the events are listed...**
	description (the default)	in alphabetic order of the event descriptions.
	controller	in alphabetic order by controller. **Note:** For each controller, the events are listed in alphabetic order by event description.
	status	by currently processing events first (red indicator), activated events second (green indicator), and suspended events third (yellow indicator). **Note:** Within each status, the events are listed in alphabetic order by event description.
Seconds	Specify the interval (in seconds) at which you want the system to refresh the dialog box (default is 20 seconds).	
Auto Refresh	Indicate whether you want the Process Control dialog box to automatically refresh (so you do not have to click Refresh).	
Activate/Suspend	• If a selected event is suspended (yellow indicator), the Activate/Suspend toggle button reads Activate. • If a selected event is activated (green indicator), the Activate/Suspend toggle button reads Suspend.	

Part	Function
Execute	Executes the selected event immediately, which allows you to manually invoke an unattended session. This also enables you to test a new event or an event that failed. **Notes:** • Executing an event immediately using this button does not replace the next scheduled run of the event. • When you click this button, an informational message box is displayed. • If the selected event is scheduled to execute within the next 30 minutes, you are notified when the event is scheduled to run and prompted to specify whether you want to run it now (click OK) or cancel the request (click Cancel). • If the selected event is not scheduled to execute within the next 30 minutes, you are prompted to either confirm the request to execute it immediately (click OK) or cancel the request (click Cancel).
Refresh	Refreshes the display of the Events tab.

Event Setup Dialog Box

The following illustrates the Event Setup dialog box:

The following describes the parts of the Event Setup dialog box.

Part	Function
Description	Enter a description of the event.
Session	Select one of the sessions you defined on the Sessions tab.
Controller	Specify the name of the controller on which the event is run.
Notification Type Event	Designate this event as a "notify type," which means that the system executes it based on parameters set in the Notification Log. **Note:** Selecting this check box deactivates the Timed and Polled tabs.
Timed tab	
Start	Indicate the beginning run time of a session. **Note:** You must enter the time in 24-hour HH:MM format. If you do not enter the time in this format, the system attempts to determine the correct 24 hour time from what you entered.

Part	Function
Until	Specify a stop time for the event. **Notes:** • You can either use 24-hour HH:MM format or 12-hour HH:MM or H:MM format with the designator "a" (am) or "p" (pm). • An event will always execute on its end time regardless of the interval that is set. To have an event execute once, do not enter an end time or interval.
Minutes	Specify an interval of time after which the event is to be executed. For example, if you specify "15" minutes, the event is executed every 15 minutes.
Calendar	Select one of the calendars you defined on the Calendars tab that you want the system to check against when scheduling this session. **Notes:** • A calendar allows you to specify days in each month that you do *not* want the selected session to be run. • If you use the Date box, you cannot use the Calendar box.
Sun/Mon/Tue/Wed/Thu/Fri/Sat	Indicate which days of the week the event is to be executed. **Note:** By default, every day of the week is selected. If any days are selected in this section, then the schedule is executed only on those days. If you select days from this section, you cannot use the Date box.
Date	Specify a date on which the event is to be executed. **Notes:** • This enables you to specify a date on which this session should run one time only. The system then removes the session from the database. • You can enter this date in any format, but the sequence of the date you enter must correspond to the international Windows date formats (for example, in the United State, dates must be entered in month/day/year format). • If you select a calendar from the Calendar box or days of the week, you cannot use the Date box.
Polled tab	
File name	Specify the name of the file for which the system checks. **Note:** You can use a wildcard (*) to specify the name of the file.
Browse	Accesses the Choose Network Server dialog box so you can browse for the file for which you want the system to check.
Result	Indicate whether the event should be executed if the result is True or False. **Notes:** • If you select True, you are indicating that the event should be executed only when the specified file is present. • If you select False, you are indicating that the event should be executed only when the specified file does not exist.

Process Control Dialog Box - Active Events Tab

The Active Events tab enables you to view only the events that are currently processing. This feature also allows you to view currently processing system events (such as temporary communication sessions).

On the Active Events tab, all currently processing events and the controller on which each event are being processed are listed in the Event list (on the left side of the dialog).

The Session list (on the right side of the Active Events tab) displays the session script for the event that is currently selected in the Events list. The Session list also contains all of the parameters for each command. This detailed view enables you to see which programs are currently being executed by the Sterling Gentran:Server Executive. The session command that is currently being processed is indicated with a green arrow.

The following illustrates the Active Events tab of the Process Control dialog box:
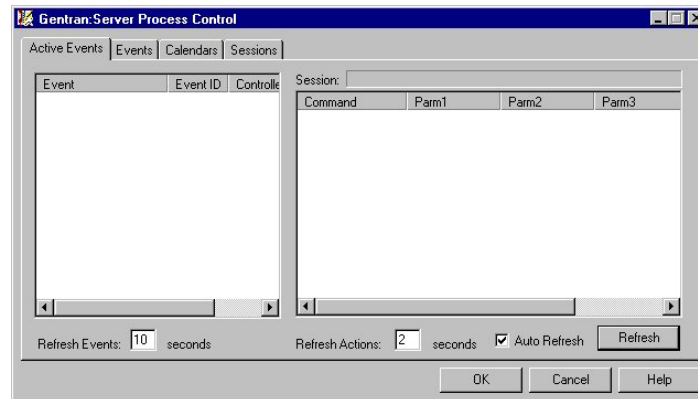
The following describes the parts of the Process Control dialog box Active Events tab.

Part	Function
(Event list)	Displays the events that are currently processing.
(Session list)	Lists each command and the associated parameters for the session script for the event that is currently processing.

A green arrow indicates which command the system is currently processing. |
| Refresh Events seconds | Specify the default interval (10 seconds) for refreshing the Active Events list. Valid values are 2 –300 seconds.
• This value is saved when you change focus on the dialog box (click another box).
• The Auto Refresh check box must be selected (checked) for the Seconds boxes to be available. |
| Refresh Actions seconds | Specify the default interval (2 seconds) for refreshing the Sessions list. Valid values are 2 seconds – 300 seconds.
• This value is saved when you change focus on the dialog box (click another box).
• The Auto Refresh check box must be selected (checked) for the Seconds boxes to be available. |
| Auto Refresh | Indicate whether you want automatic refresh enabled. The default is Enabled, which means that you do not have to click Refresh. |

Part	Function
Refresh	Manually refreshes the Active Events display. If the Active Events tab has not been refreshed after an event has expired (is no longer active), the system continues to display the event on the Active Events tab (even though it is inactive), until the Active Events tab is refreshed.

Creating and Editing Events

You can specify that the event runs as timed or as polled. You are not able to edit an event unless the event is suspended.

About this task

If the event is running as **timed**, you must specify a time, a pre-defined calendar and/or days of the week to run, or a date to run one time only. When it is time for the event to be run, the Sterling Gentran:Server Scheduler service initiates the processing of the event.

If the event is running as **polled**, you can specify a file name and whether the event should run if the file exists or not. The Sterling Gentran:Server Poller service polls the process controller.

* If you specified that the file must exist, the Poller initiates the processing of the event when the file appears.
* If you specified that the file must not exist, the Poller initiates the processing of the event when the file no longer exists on the controller.

To create a new event, complete the following steps:

Procedure

1. On The Desk, click **Process Control**.

   The system displays the Process Control dialog box.
2. Click the **Events** tab.
3. Click either **New** or **Edit**.

   The system displays the Event Setup dialog box so you can create a new event entry.
4. In the Description box, type a description of the event.
5. From the Session list, select the session that you want to be executed.
6. In the Controller box, type or select the machine name of the controller on which you want this event to be run.
7. For notification events, select the **Notification Type Event** check box and continue with Step 17. Otherwise, continue with the next step.
8. For timed events, you must specify times and days that the event should run. Do the following:
   a. Enter a starting time.
   b. If you want to specify a stop time for the event, type that time in the Until box.
   c. To specify an interval of time after which the event is run, type the number of minutes after which you want the event to be executed.
   d. To use a predefined calendar, select that calendar from the Calendar list.

> **Note:** If you select a calendar, you cannot use a specific date.

  e. Select a day or days of the week on which you want this session to be scheduled

> **Note:** If you select days of the week, you cannot use a specific date.

  f. To specify a date on which you want this session to run *one time only*, type that date in the Date box.

> **Note:** If you use a specific date, you cannot select from the days of the week.

9. For polled events, do the following:

  a. Click the **Polled** tab.

  b. Navigate to or type the path and name of the file for which you want the system to check.

  c. From the Result list, select **True** or **False**.

10. Click **OK**.

  The event is saved and you exit the Event Setup dialog box.

11. Click **OK**.

  The system exits the Process Control dialog box.

Deleting Events

You are not able to delete an event unless the event is suspended.

About this task

To delete an event, complete the following steps.

Procedure

1. On The Desk, click **Process Control**.

  The system displays the Process Control dialog box.

2. Click the **Events** tab.

3. Select an event and click **Delete**.

4. Click **OK** to confirm the deletion.

5. Click **OK**.

  The system exits the Process Control dialog box.

Viewing All Events
About this task

To view all events, complete the following steps.

Procedure

1. On The Desk, click **Process Control**.

  The system displays the Process Control dialog box.

2. Click the **Events** tab.

3. If you want to filter events by the controller on which the events are run, select that controller from the Controller list.

4. You can sort by any of the following options:

  • Description (default)

- Controller
- Status - Events are listed by:
  - currently processing events (red indicator)
  - blocked events (green indicator with red X)
  - activated events (green indicator)
  - suspended events (yellow indicator)
5. If necessary, change the Refresh options:
   - If you want to change the interval in which the dialog box is automatically refreshed, in the Seconds box, type the interval (in seconds) at which you want to refresh the dialog box (the default is 20 seconds). Valid values are 2 – 300 seconds.

     Note: This value is saved when you change focus on the dialog box (click another box). The Auto Refresh check box must be selected (checked) for the Seconds box to be available.
   - If you do not want the Events tab to automatically refresh, click the **Auto Refresh** check box to deselect it.

     Note: The default for automatic refresh (so you do not have to click Refresh) is enabled (checked).
6. Click **OK**.

   The system exits the Process Control dialog box.

Viewing Active Events
About this task

To view active events, complete the following steps.

Procedure

1. On The Desk, click **Process Control**.

   The system displays the Process Control dialog box.
2. From the Event list, select the event for which you want to view further detail.

   The system displays each command and its associated parameters in the session script for that event in the Session list. The session command currently being processed is indicated with a green arrow.
3. If necessary, change the Refresh options:
   - If you want to change the interval in which the dialog box is automatically refreshed, in the Seconds box, type the interval (in seconds) at which you want to refresh the dialog box (the default is 20 seconds). Valid values are 2 – 300 seconds.

     Note: This value is saved when you change focus on the dialog box (click another box). The Auto Refresh check box must be selected (checked) for the Seconds box to be available.
   - If you do not want the Events tab to automatically refresh, click the **Auto Refresh** check box to deselect it.

     Notes:
   - The default for automatic refresh (so you do not have to click Refresh) is enabled (checked).
   - The default interval for refreshing the Event list is 10 seconds.

- The default for refreshing the display of the Session list is 2 seconds.
- If the Active Events tab has not been refreshed after an event has expired (is no longer active), the system displays the event on the Active Events tab (even though it is inactive), until the Active Events tab is refreshed.

4. Click **OK**.

The system exits the Process Control dialog box.

Activating an Event

About this task

To activate an event, complete the following steps.

Procedure

1. On The Desk, click **Process Control**.

The system displays the Process Control dialog box.

2. Click the **Events** tab.
3. Select the suspended event that you want to activate and click **Activate**.
4. Click **OK**.

The system exits the Process Control dialog box.

Suspending an Event

About this task

To suspend an event, complete the following steps.

Procedure

1. On The Desk, click **Process Control**.

The system displays the Process Control dialog box.

2. Click the **Events** tab.
3. Select the activated event that you want to suspend and click **Suspend**.

Note: If an event is currently processing, you are not able to suspend it until processing has terminated.

4. Click **OK**.

The system exits the Process Control dialog box.

Executing an Event Immediately

The Events tab of the Sterling Gentran:Server Process Control dialog enables you to execute the selected event immediately. This function allows you to manually invoke an unattended session and also enables you to test a new event or an event that failed.

About this task

To execute an event immediately, complete the following steps.

Procedure

1. On The Desk, click **Process Control**.

The system displays the Process Control dialog box.

2. Click the **Events** tab.

3. Select the suspended event that you want to execute immediately and click **Execute**.

4. Either click **OK** to run the event immediately or click **Cancel** (the event will execute at its scheduled time).

5. Click **OK**.

   The system exits the Process Control dialog box.

Calendars

Process Control Dialog Box - Calendars Tab

The process control Calendar feature enables you to configure system calendars that excludes specific dates (such as holidays) or days of the week from processing.

Like session definitions, these calendars are defined independently from the event, so that they can be "attached" to multiple event entries. The calendar begins with the current month and year.

The following illustrates the Calendars tab of the Process Control dialog box:
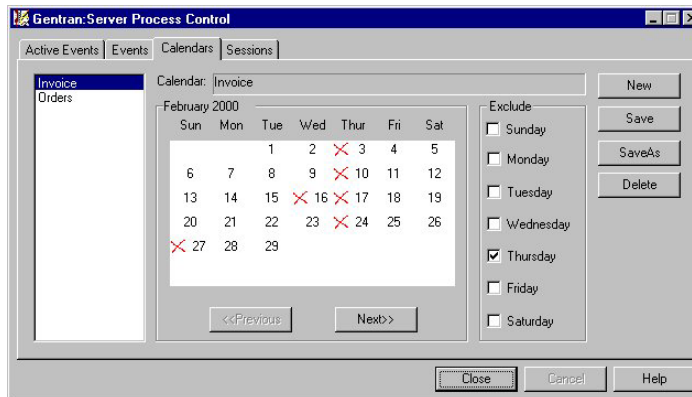
The following describes the parts of the Process Control dialog box Calendars tab.

Part	Function
(Calendars list)	Displays a list of all defined calendars.
(Calendar)	Displays the current month of the selected calendar.
Previous	Displays the previous month in the calendar. **Note:** This button is only activated if a calendar is selected and a previous month exists for the calendar.
Next	Displays the next month in the calendar. **Note:** This button is only activated if a calendar is selected.
Exclude	Select which days of the week to exclude from processing. These are displayed with red Xs through them.
New	Accesses the New Calendar dialog box so you can create a new calendar.
Save	Saves the current calendar. **Note:** The Save command is only active if a calendar is displayed in the middle of the dialog box.
Save As	Saves the current calendar under another name. **Note:** The Save As command is only active if a calendar is displayed in the middle of the dialog box.

Part	Function
Delete	Deletes the selected calendar.

Creating and Editing Calendars
About this task

To create or edit a calendar, complete the following steps.

Procedure

1. On The Desk, click **Process Control**.

   The system displays the Process Control dialog box.
2. Click the **Calendars** tab.
3. To create a new calendar, click **New**. Otherwise, select the calendar that you want to edit and continue with Step 6.
4. In the Calendar Name box, type the new calendar name using up to 8 alphanumeric characters.
5. Click **OK** to add the new calendar.

   The system displays the new calendar in the middle of the Calendars tab.
6. To exclude a specific date from processing, click that date on the calendar.

   Note: The system displays a mark for that date on the calendar to signify that it is excluded from processing. Click **Previous** or **Next** to access the preceding or succeeding calendar months in the calendar.
7. To exclude a specific day or days of the week, select the check box in the Exclude section for each day of the week that you want to exclude from processing.

   Notes:
   - You can select one or more days of the week on which you never want processing to occur.
   - The system allows you to exclude all seven days of the week, if that is your intention. In this situation, processing never occurs.
   - To deselect a day, clear the check box.
8. Click **Save** to save the new calendar.
9. Click **OK**.

   The system exits the Process Control dialog box.

Deleting Calendars
About this task

To delete a calendar, complete the following steps.

Procedure

1. On The Desk, click **Process Control**.

   The system displays the Process Control dialog box.
2. Click the **Calendars** tab.
3. Select a calendar and click **Delete** to delete the current selection.
4. Click **Yes** to delete the current selection.

5. Click **OK**.

    The system exits the Process Control dialog box.

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