Gentran Integration Suite™

Trading Partner and Community Management

Version 4.2

Sterling Commerce
An IBM Company

Contents

Contents

Introduction to Trading Partners and Community Management

Trading Partners

A *trading partner* is an organization that conducts e-business with other organizations. Gentran Integration Suite must have certain information about trading partners in order to automate a secure exchange of business documents with them. Gentran Integration Suite stores this information in a trading partner profile, which is know as a *trading profile*.

The trading profile:

✦ Links the trading partner with the business processes created to exchange business documents and transactions

✦ Describes the role of a trading partner in those business processes as a producer of messages, consumer of messages, or both

✦ Determines what documents are allowed into and out of Gentran Integration Suite

Gentran Integration Suite offers three types of trading partner profiles:

✦ Basic - provides a much shorter input method, which requires less information to get started.

✦ Advanced - provides separate records for profile, identity, document exchange, transport method, delivery method, and packaging

✦ AS2 - provides records specific to AS2 trading partners

Community Management

A *community* is a collection or grouping of trading partners for the purpose of achieving a common goal. The goal is defined and enforced by the creator of the community (the host). For example, you can create a group of partners (manufacturers) from whom the host (a retailer) wishes to purchase items. The host may create a separate community for each department (toys, hardware, clothing, groceries, home and garden), or one for purchasing resale items (all departments), one for purchasing maintenance items and services (third-party in-store subretailers, facilities maintenance, janitorial services). Community Management tools allow you to quickly and easily create trading partner relationships, including contracts.

You can set up and manage all of your trading partners and trading partner communities using the Gentran Integration Suite Admin Console or Community Management.

Using Trading Partners and Community Management

To order to successfully conduct e-business using Gentran Integration Suite, you will need to:

✦ Create your own trading partner communities

✦ Enter your own organization trading partner information

✦ Set up a trading partner profiles or import the trading partner profiles

✦ Invite your business partners to join your communities

✦ Decide what security methods you and your trading partners will employ (digital certificates, etc)

✦ Define contracts for your trading partners

✦ Once trading partners have joined your community, you can create a business process that describes your e-business transactions and run the business process

Before You Create Trading Partner Profiles

You will need to gather some information and make some decisions prior to creating your trading partner profiles. They are:

✦ Determine if you and your trading partner are going to use digital certificates for secure data transport.

✦ Determine if you are going to enter the trading partner in a basic profile or an advanced profile.

✦ Create your community

✦ Collect the following information about you and your trading partner:

- ◆ Name and address

- ◆ Sending and receiving protocols and settings

- ◆ IP addresses and port numbers

- ◆ Enveloping properties

- ◆ Passwords

Note: If you are exchanging EDI documents using a value-add network (VAN), you may not need to set up trading profiles. When using a VAN, you may need only to create document envelopes, which sufficiently completes information requirements that Gentran Integration Suite needs to exchange the EDI documents.

Basic Trading Partner Profile

For some businesses, they need a simplified method of entering trading partner data quickly. The basic trading partner profile option enables you to:

✦ Provide contact information about your trading partner

✦ Set up communication properties to exchange documents with your trading partners.

You will need to collect the following information from your trading partner, before you can add the trading partner to your community:

✦ Name

✦ Address

✦ City

✦ State

✦ Zip Code

✦ Protocol used by the trading partner (FTP, SMTP, HTTP, or File Transfer)

Note: Depending on the protocol used, there will be some additional information that you will need to enter.

If after you have entered the basic trading partner information, you find that you need to make an update to any of the information, you can use the same procedure to update basic or advanced trading partner records.

Advanced Trading Partner Profile

Gentran Integration Suite offers an advanced trading profile set up option. Which includes separate records for each of the following:

✦ Identity

✦ Transport

✦ Document exchange

✦ Delivery channel

✦ Packaging

✦ Profile

Identity Record

Every trading partner is represented by at least one record, called an identity. An *identity record* describes the trading partner and contains information referenced when a business process involving the trading partner is run. A trading partner can have more than one identity to represent the different ways it does business. For example, a company's central office procurement organization might be radically different from its manufacturing supplies procurement organization. In such cases, you need a separate identity record for each organization.

A *base identity* is a regular identity that you can use as a starting point to create a new identity. The base identity maintains a link to the identity that inherited its properties. If you modify the base identity, all related identities (that is, ones that inherited the base identity properties) change, as well. When you create an identity record using a base identity, everything in the new identity is the same as in the base identity, except the identity name, description, and other unique parameters, such as unique identification numbers.

Note: If you plan to create many identities using the base identity, do not use the base identity in production. You should record the identities that are related to the base identity.

You must create an identity before you can create a transport, document exchange, delivery channel, packaging, profile, and a contract when necessary. Each of these components references an identity.

Transport Record

The *transport record* describes the document delivery protocol. It identifies the protocol, such as HTTP, FTP, or SMTP. In addition, the transport record provides details about the use of the protocol, such as HTTP configured with SSL for secure data exchange. Each identity can have more than one transport record. When an identity has more than one transport record, you must create corresponding profile records.

Document Exchange Record

A *document exchange record* describes the properties of the documents and messages passed between trading partners. These properties include the messaging services and message envelopes selected by a trading partner. For example, digital enveloping properties include the trading partner digital signature and

encryption required when using the SMIME protocol. To describe properties of the documents and messages passed between trading partners, you must create a document exchange record.

Delivery Channel Record

A *delivery channel record* links a document exchange record and a transport record. The combination of these two records provides a complete description of how a trading partner expects to receive documents. A delivery channel record eliminates re-entry of document exchange information for every transport protocol.

Packaging Record

A *packaging record* describes the organization of a document and its contents, including a message:

✦ Header or envelope that contains identifying metadata

✦ Body or payload that contains the business content

A packaging record can be shared among trading partners. In addition, a packaging record provides details about protocol-specific security, as well as envelope fields like a MIME content type or an XML namespace.

Profile Record

A *profile record* is a type of document exchange record that links a delivery channel record and a packaging record to a business process. A profile links a delivery channel and packaging records of a trading partner to a business process.

Importing and Exporting Trading Partner Data

Gentran Integration Suite provides several utilities to help you:

✦ Convert and import trading partner data.

✦ Import a file containing document envelopes or control numbers (or both) from the command line.

✦ Import document envelopes without control numbers so you can keep your test and production systems synchronized. The document envelopes are imported but the sequential control numbers from the production system (the system to which the envelope is being imported) are used.

✦ Export trading partner data

Gentran Integration Suite uses two types of control numbers: *local,* in which the control number is contained in the partner envelope, and *global,* which references a control number outside of the envelope (a control number that many envelopes can reference).

 You can import trading partner data into Gentran Integration Suite by using any of the following:

✦ Resource Manager (Administration Menu > Deployment > Resource Manager)

✦ Basic Import Utility (Command Line)

You can export trading partner data using a command line script. This is the preferred method when exporting large amounts of data, as it exports the data directly to the file system instead of saving the output file in memory.

Resource Manager

The Import/Export feature supports many different resource types, including trading partner data. When you use the Resource Manager to export an envelope that uses a **global control number,** the export file uses the global control number and you need to have configured a global control number on the import system.

When you import a file that contains envelopes or control numbers (or both), the Import option converts an XML file or installable bundle to Gentran Integration Suite resources format.

Depending on the type of export you used (standard or advanced, default or all versions), the Import option performs the following functions:

✦ Creates and checks in new versioned envelopes (assigns time/date of the import)

✦ Updates or preserves existing non-versioned envelopes

✦ Preserves or appends existing checked-in envelopes

Caution: To prevent the loss or corruption of existing records, preserve and download the backup file of all imports that you conduct.

The standard import:

✦ Appends to existing versioned resources

✦ Sets the default according to imported records

Some important general information about importing resources:

✦ You must manually update imported resources that contain hard-coded, computer-specific information. For example, system paths in scripts must be manually changed to use the new path after importing resources to their new location.

✦ During import, Gentran Integration Suite creates a backup file containing records as they existed prior to import. After you import the resources, you can download and preserve the backup file, which is named backup.xml by default. You can change the name of the backup file so that you do not overwrite an existing backup file.

The import process creates a new record where none exists. If you are importing envelopes to an environment that already contains the same envelopes, you have the option to update the existing envelope or to preserve the existing envelope.

Basic Import Utility

You can use the Basic Import Utility to quickly and easily create new trading partner identities, by importing the trading partner data into Gentran Integration Suite.

This tool enables you to import a CSV file containing trading partner identity information from the command line. The utility converts the CSV file to XML and imports the file, and then provides the status when it has completed or when a time-out has occurred (whichever comes first).

You will need to configure the Basic Customer Import File System adapter (BasicCustomerImport_FSA) to create the appropriate adapter configuration for use with the Basic Import utility. You must specify field settings in Gentran Integration Suite to set up how often and when the adapter checks the file collection folder for CSV files to translate to XML and import to Gentran Integration Suite

Before you import the CSV file, you should you should compare trading partner names between the CSV file and Gentran Integration Suite, to be sure you are not overwritten information you need.

Note: Using a text editor, you can view the **BasicImport.rpt** file, a report of the conversion from CSV to XML and status of importing the CSV file into Gentran Integration Suite located in the *install_dir*/**tp_import** directory.

As part of this functionality, Gentran Integration Suite also provides you with the following:

✦ The basicimport.sh utility (used for UNIX), located in the *install_dir*/**tp_import** directory

✦ The basicimport.cmd utility (used for Windows), located in the *install_dir*/**tp_import** directory

✦ A map (BasicCustomerImport.map)

Caution: It is possible for you to change the BasicCustomerImport.map, but you are strongly cautioned not to change the right hand side of the map (the output side) that was generated from the schema. If you were to change a mandatory element to conditional, and then did not have the data present when you attempted to import the data, the import will fail.

✦ A translation object (BasicCustomerImport.txo) that is automatically checked in to Gentran Integration Suite

✦ An instance of the File System Adapter (BasicCustomerImport_FSA)

✦ A predefined business process (BasicCustomerImport.bp). This business process is used by Gentran Integration Suite to implement the Basic Import utility: BasicCustomerImport.bp. This predefined

business process is initiated by the Basic Customer Import File System adapter during basic import utility processing and does not require you to modify it.

♦ A report of the conversion from CSV to XML and status of importing the CSV file into Gentran Integration Suite (BasicImportReport.rpt, in XML format), located in the *install_dir*/**tp_import** directory after the Basic Import utility is run

♦ The XML file containing the converted CSV file (basicimport.XML), located in the *install_dir*/**tp_import** directory after the Basic Import utility is run

♦ A folder (*install_dir*/**tp_import**), where the files needed to use the Basic Import utility are located

♦ A subfolder (*install_dir*/**tp_import/basic_customer_import_collect**), where you can drop CSV files to be automatically picked up by the Basic Customer Import File System adapter

This table describes how Gentran Integration Suite supports the Basic Import Utility:

Functionality	Enhancements	Action You Need to Take to Implement the Basic Import Utility
Service	♦ New Basic Customer Import Service File System Adapter added (BasicCustomerImport_FSA).	Configure BasicCustomerImport_FSA.
Predefined business processes	♦ Predefined Basic Customer Import business process (BasicCustomerImport.bp) added.	None.
Map Editor	♦ New map (BasicCustomerImport.map) and translation object (Basic CustomerImport.txo).	Modify the Basic Customer Import map to correspond to your CSV file layout or ensure that your CSV file layout corresponds to the necessary file layout.
Basic Import Utility	♦ New utility to enable you to import CSV files (basicimport.sh for UNIX or basicimport.cmd for Windows). ♦ New report in XML format of the conversion from CSV to XML and status of importing the CSV file into Gentran Integration Suite (BasicImport.rpt).	♦ Use the Basic Import Utility (basicimport.sh or basicimport.cmd) to import your CSV files into Gentran Integration Suite. ♦ View the BasicImport.rpt file (in the *install_dir*/**tp_import** directory) using a text editor.

Synchronize Trading Partner Information

You can use the automatic synchronization feature to retrieve trading partner and community update information from hosted communities you have joined or trading partners who have joined your community. In order for this process to execute, connectivity information must be shared between your system and any communities you have joined, or have joined you, remotely. The synchronization feature is not available for trading partners who were added manually.

Caution: If you delete a protocol from an existing community that has been joined by other trading partners, that community can no longer be synchronized.

You can use the automatic update feature to get updated community and trading partner information. In order for this process to execute, connectivity information must be shared between your system and any communities you have joined, or have joined you, remotely. The synchronization feature is not available for trading partners who were added manually.

Broadcast Messages to Your Trading Partner

You can send broadcast messages to any or all registered trading partners in a community. You cannot send the same message at the same time to multiple communities. Only one community message can be sent at one time.

Examples of when you should send a broadcast message include scheduled or unscheduled system outages, or if you have made changes to your community profile that affect your trading partners.

Community Management

Gentran Integration Suite Community Management allows you to quickly and easily organize your trading partners into groups (communities). In addition, when you create a community, you determine what protocols and document types are acceptable. Data from these transactions are then grouped in Gentran Integration Suite for easy identification and tracking.

With Community Management provides you can:

✦ Create communities

✦ Join communities using Onboarding, manually, or by importing data

✦ Broadcast messages to your trading partners and communities

✦ Assign community access codes (for trading partners who do not use onboarding)

✦ Monitor community activities

✦ Sync up community and trading partner data

Before You Create a Community

Before you set up a community, consider the following items:

✦ You will need to collect the following information about your organization:

   ◆ Sending/receiving protocols and settings

   ◆ IP addresses and port numbers

   ◆ Enveloping properties

✦ You will need to think about Community Access codes.

✦ How will your trading partners join your community? Will they use Onboarding, will it be a manual process or will you need to import some data?

Onboarding

Onboarding enhances B2B visibility and management by providing a means for your trading partners to join your trading partner community. This feature not only enhances the trading partner's experience by providing an online platform for them to manage their profile, but also removes the manual setup and ad-hoc invite process required previously of community hosts for their trading partners.

Onboarding offers the following benefits:

✦ Allows for easier onboarding of trading partners by using an online interface exposed outside of your firewall.

✦ Replaces a manual process for adding non-Gentran Integration Suite trading partners.

✦ Provides clear information for the community host about the status of a trading partner in the process of joining a community.

✦ Automates the invite process for bringing trading partners onto a community.

Information About Onboarding for Gentran Integration Suite Customers Who Are Upgrading

If you are a Gentran Integration Suite customer who is upgrading, the trading partner profiles already added to a community are not affected. However, upgrading customers can use the new invitation process and onboarding functionality going forward to quickly add new trading partners whether they use Gentran Integration Suite or not.

Security is built into the invitation process so that only the trading partner who receives your invitation can access the Onboard page and register for your community. Community Access Codes are no longer necessary. Your trading partner can only join the community he was invited to join. If you maintain several different communities, you do not need to worry about trading partners joining other communities if you do not invite them to join those communities.

Note: In the My Joined Communities portlet, for Gentran Integration Suite 4.0/SP3 or greater trading partners, the dashboard ping status will be red while registration is pending, changing to green once the registration is accepted. For Gentran Integration Suite 4.0/SP2 trading partners, the dashboard ping status will always display green regardless of actual state.

Note: In the My Hosted Communities portlet, the dashboard ping status for Gentran Integration Suite trading partners will be red while registration is pending, turning to green once accepted. For non-Gentran Integration Suite trading partners, the status will always be yellow.

Invite a Trading Partner to Join Your Community Using Onboarding

The first step to allowing your trading partner to join your community is to send them an e-mail invitation. Use the Invite option on the View Trading Partners page to send an e-mail message to the designated contact person for your trading partner. The e-mail contains a URL where your trading partner can access an external site to register for your community. The e-mail invitation process is the same whether your trading partner also uses Gentran Integration Suite or not.

Once you have invited a trading partner to join your community, their name appears under the Invited tab on the View Trading Partner page. When your trading partner registers for your community using Onboarding, their name is removed from the Invited tab and appears on the Pending tab, awaiting your approval.

How Your Trading Partners Use Onboarding to Join Your Community

Your trading partners can use Onboarding to join a community whether or not they have Gentran Integration Suite installed. Once they receive an e-mail invitation to join a community, they are directed to an external site to register.

If they have Gentran Integration Suite installed, they are given your Discovery Profile URL and are instructed to join your community using that method. If your trading partner does not have Gentran Integration Suite installed, they are instructed to complete registration using the online forms.

Accept or Reject a Trading Partner Registration Request

Once your trading partner registers for your community, their information is added to the Pending tab on the View Trading Partner page. In order to activate their registration, thus enabling their trading profile in Gentran Integration Suite, you must accept it.

When you click Accept, the trading partner name is removed from the pending tab and appears on the Registered tab. A registration confirmation e-mail is sent to the trading partner reminding them of their login ID and password (selected at registration) and providing the URL where they can log in and view their account information as it pertains to the community they joined.

If you reject the registration, the profile is removed from Gentran Integration Suite and a rejection notification e-mail is sent to the trading partner. The trading partner name is removed from the Pending tab and appears on the Rejected tab. If you reject a trading partner in error, you can restore the request by clicking Restore next to the trading partner name on the Rejected tab.

Join a Trading Partner's Hosted Community Using Onboarding

You can join a community hosted by one of your trading partners using Community Onboarding. You are still able to join a hosted community using the Discovery Point, Manual, or File Input methods. However, Onboarding is an automated notification and response system that makes it easier for you to get the information you need to join a hosted community. This is also how your trading partners who have Gentran Integration Suite installed can join your hosted communities.

Join a Community

Gentran Integration Suite provides multiple ways for you and your trading partners to join communities:

✦ Onboarding
✦ Manually
✦ File Import/Export.

Use Onboarding to Join a Community

Community Onboarding allows non-Gentran Integration Suite trading partners to join a community using an online form. This Onboarding feature not only enhances the trading partner's experience by providing an online platform for them to manage their profile, but also removes the manual setup and ad-hoc invite process required previously of community hosts for their trading partners.

Manually Join a Community

If you or your trading partner's business processes or firewall configurations prohibit using federation to link your systems in order to join a community, or if your system is temporarily unable to connect with your trading partner's system, you must join their community manually.

Note: Because you are manually entering your trading partner's information into your system, and there is no synchronization of profile information, your trading partner must also add your trading partner profile information on their side to correspond with yours.

File Import/Export to Join a Community

If you or your trading partner's business processes or firewall configurations prohibit using federation to link your systems in order to join a community, or if your system is temporarily unable to connect with your trading partner's system, you can use the file import method to join their community.

Note: If you use the file import method to join a community, and there is no synchronization of profile information, your trading partner must also add your trading partner profile information on their side to correspond with yours, and create a contract for this trading relationship.

Join Trading Partner Communities that are Hosted by Others

You can remotely join a community that your trading partner created. They will send you a Discovery Point URL and access code that you need in order to join. By joining a trading partner's community you can begin trading documents with them.

The following options are available:

✦ Discovery Location (recommended), Using Discovery Location to join a community is the preferred, automated choice.
✦ Manually Enter Community

✦ File Import

Note: You cannot join a community that represents a trading partner already in your system. You can select only available trading partners. If your trading partner information is invalid and cannot be sent to the hosted community, an error message is displayed.

Community Access Codes

A community access code is required for your trading partner to join your community remotely and begin exchanging documents with your system if they do not use Onboarding. Gentran Integration Suite comes with a default access code which is assigned to all of your hosted communities unless you change it. The default code is 1234-5678 and is part of the Trading Partners permission group.

Note: If your trading partner does not use Gentran Integration Suite and cannot use Community Onboarding, or is not able to remotely join your community, you need to add them to your community manually. An access code is not necessary.

You can assign a community a different access code. If you add multiple communities, you can create multiple access code groups so that each community has a different access code. This allows you to control access to the communities your trading partners can join.

Once you add or update access codes for a community, you need to share it with your trading partners. However, only trading partners who use Gentran Integration Suite can join a community remotely. In addition, if you are joining a trading partner's community remotely, you need that trading partner's access code to join their community as a trading partner.

Contracts

A contract is an agreement between trading partners. It details how they will conduct business transactions. Contracts are useful when you want a customized process for a specific customer that does not apply to any of your other customers. Or perhaps you have a specific arrangement with a customer that is not the same as the arrangement you have with a second customer. A single trading partner can be associated with more than one contract.

The following figure shows a typical contract negotiation process between two trading partners:
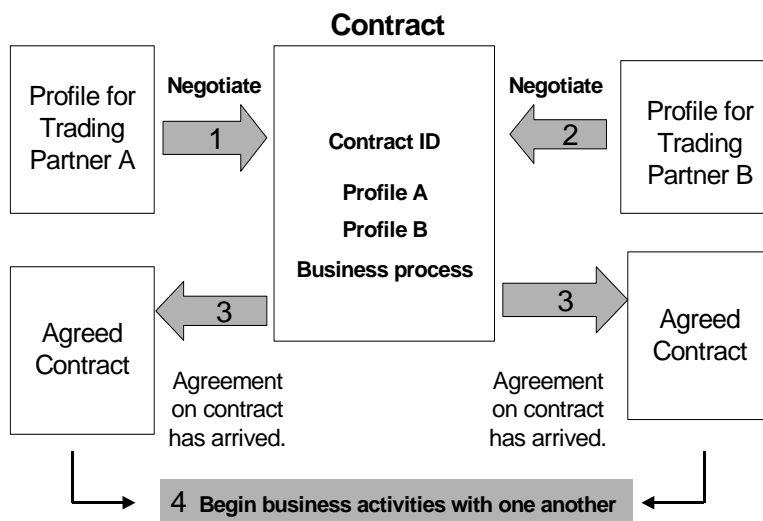
When you use Community Management to add a community or to join a hosted community remotely, Gentran Integration Suite automatically creates a contract for you. However, if you use the Advanced Trading Partner options on the Admin Console to create a trading partner profile, you need to add a contract manually.

Before You Create a Contract

Before creating a contract, here are some items to consider:

✦ Create a trading profile for each trading partner or identity that will be participating.

✦ Determine business requirements and, if necessary, create a business process based on the requirements to associate with the contract.

✦ Determine if you are going to have a code list associated with the contract.

✦ If this trading partner uses RosettaNet, then the contracts require specific configurations. For information on creating a RosettaNet contract, see the Documentation Library.

✦ If this trading partner uses ST or UNH inbound envelopes, you cannot create a standard rule to perform a process data lookup during translation. To perform a process data lookup in a standard rule, specify the contract on the ST or UNH inbound envelopes, and then run a separate translation following the deenveloping process.

Code Lists

Gentran Integration Suite uses code pairs in code lists to identify items in transactions between two or more trading partners. A trading partner *code list* consists of one or many pairs of code values containing a sender code and a receiver code. Each code pair has one description and up to four additional codes relating to the pair. Code lists are dynamic and are stored in a database.

From the Trading Partner menu, you can create, edit, copy, create versions, and enable and disable code lists. In the Map Editor when you use Select standard rule, you can change the content of a field using a code list. Gentran Integration Suite uses the code list name, sender identity, receiver identity, and either the sender code or the receiver code to determine the correct code list for a map to use, according to what the map is processing.

Caution: Attempting to view a very large code list (over 100,000 entries) may fail with an Out of Memory error displayed. See Performance and Tuning for information on how to increase the memory allocated to Gentran Integration Suite.

If you have a code list for the same sender and receiver that has several different sets of code pairs, you can create a new version of the code list for each code pairs set. In addition, you can also create different versions of individual code pairs contained within a code list.

Monitor Community Activities

Gentran Integration Suite provides several features for tracking and monitoring community and trading partner activity.

You can also synchronize your profile information with your trading partners and track documents. Tracking features include:

✦ Searching for trading partners

✦ Checking pending invitations

You can use the reports function to view trend information related to your trading partner activities.Gentran Integration Suite provides the following community management reports:

✦ Document Tracking

✦ Document Activity

✦ Community Registration

✦ Trading Partner

Note: If no data matches the requested report criteria, the report displayed is blank.

Document Tracking Report

The Document Tracking feature allows you to create an online report of documents processed selected by any combination of select criteria.

Document Activity Report

The Document Activity report displays documents related to the specified trading partner. You can select to display specific trading partner documents or all trading partner documents. The default selection date is the past 30 days but you can enter any time frame.

Community Registration Report

The Community Registration report displays new trading partner registration information alphabetically by name, including registration date, phone number, and e-mail address. You can select to display specific trading partners or all trading partners. The default selection date is the past 30 days but you can enter any time frame. This report might be useful if you wanted to verify that a new trading partner successfully registered with one of your communities.

Trading Partner Report

The Trading Partner report displays trading partner information alphabetically by name, including phone number, mailing address, e-mail address, and EDI ID. You can select to display specific trading partners or all trading partners. Use this report to verify that a new trading partner successfully registered with your community.

Monitor Your Registration

Use Gentran Integration Suite to monitor your registration process using the View Trading Partners page. Communities you have registered with but have not been accepted to are listed under My Profile(s) on the Pending tab. When a community accepts your registration, your information is removed from the Pending tab and appears under the Registered tab. You are ready to begin exchanging documents with your trading partner. Information for this community is also displayed on the Dashboard.

Introduction to B2B Services

The B2B services simplify sophisticated decisions, run business subprocesses, and send documents to trading partners through the appropriate transport protocol. B2B services are preconfigured and installed as part of Gentran Integration Suite. Therefore, you do not need to configure these services to use them.

B2B services are dynamic services, independent of transport protocols or adapters, trading profiles, and contracts, that determine how to exchange data between trading partners. By using these services in a business process, you can eliminate the need to configure many of the details necessary to define this data exchange.

To communicate with trading partners, you must define a trading partner record and use at least one of the following B2B services in every business process (unless you are using the EDIINT Message service):

- ✦ B2B Lookup Service
- ✦ B2B Send Service
- ✦ B2B Respond Service
- ✦ B2B Request-Response Service

B2B Service Example

You are a reseller for several suppliers who update their inventory levels periodically and a single customer who purchases items from you. When an inventory level is updated, you receive a notification from a supplier. When you receive the notification, you must request the new inventory listing from the supplier, merge it with your existing inventory report, and send it to your customer.

Assuming your supplier is the producer and you are the consumer in a contract, the steps in the business process for the example are:

1. Translate the notification of an inventory change to a request for an inventory change report.

2. Use the B2B Request-Response service to request the inventory level report from the trading partner that sent the notification.

3. Create a complete report for the customer using various services.

4. Send the report to the customer using the B2B Respond service.

For the sample business process, the following roles would perform the indicated tasks:

Role	Task
Business analyst	Define a business process that requests an inventory listing from a trading partner, format it properly and merge it with existing inventory reports, and send the resulting inventory to the customer.
System administrator	Configure the communications protocol adapters to start the business process correctly.
Trading partner administrator	Type all the trading profile information for the producers and consumers of the data. This information includes contracts between the producers and Gentran Integration Suite.

B2B Lookup Service

The B2B Lookup service is a system service that is used by other services and business processes to retrieve trading partner contract records and profile information. The B2B Lookup service runs automatically when the B2B Send, B2B Respond or B2B Request-Response service, or the B2B_LOOKUP system business process is used. Therefore, for many of your business processes, you do not need to include the B2B Lookup Service.

Note: You must configure the trading profile and contract before the B2B Lookup service runs.

How the B2B Lookup Service Works

The B2B Lookup service uses two parameters defined within a business process:

✦ B2B Contract ID

✦ B2B Message Mode

1. The B2B Lookup service retrieves the profile associated with the contract and message mode.

   Depending on the B2B Message Mode, the B2B Lookup service performs one of the following actions:

   ◆ If the B2B Message Mode is Respond, the service uses the production (sending) profile of the contract.

   ◆ If the B2B Message Mode is Send, the service uses the consumption (receiving) profile of the contract.

   ◆ If the B2B Message Mode is Request-response, the service uses the production (sending) profile of the contract.

2. The B2B Lookup service retrieves the business process referenced in the transport record associated with the contract.

B2B Send Service

The B2B Send service sends messages to a consumption (receiving) trading partner using trading profile information in the contract.

Note: You must configure the trading profile and contract before using B2B Send service.

How the B2B Send Service Works

When a business process includes the B2B Send service:

1. The service runs as part of the business process.

2. This service starts the B2B Lookup service.

3. The B2B Lookup service locates:

   ◆ The consumption profile of the contract

   ◆ The transport protocol of the consumption profile

   ◆ The appropriate transport business process for the transport protocol of the profile, or the business process associated with the Send message mode in the consumption profile, if specified.

4. The B2B Lookup service either runs the default business process if none was specified in the profile, or runs the business process specified in the consumption profile for Send message mode.

5. The B2B Lookup service starts the appropriate communications adapter.

6. The communications adapter sends a message to the consumption profile transport server.

Using the B2B Send Service

To use the B2B Send service:

1. In your business process, precede the B2B Send service with the Assign service and configure it to assign the contract ID to b2b-contract-id or the contract name to b2b-contract-name.

2. Include the B2B Send service in the business process.

After a business process is created that uses the B2B Send service, the same business process can be associated with any number of contracts to send messages to the consumption profile of the contract.

The B2B Lookup service looks up the trading partner transport information and uses the specified transport protocol, such as HTTP, SMTP, or FTP, to send the message.

B2B Respond Service

The B2B Respond service responds to messages from a production (sending) trading partner using trading profile information in the contract. Thus, after creating and executing a business process that includes the B2B Respond service, the business process responds to a message received from the trading partner by sending a message.

Note: You must configure the trading profile and contract before using this service.

How the B2B Respond Service Works

1. The service runs as part of the business process.

2. The B2B Respond service starts the B2B Lookup service.

3. The B2B Lookup service locates:

   ◆ The production profile of the contract

   ◆ The transport protocol of the production profile

♦ The appropriate transport business process for the transport protocol of the profile, or the business process associated with the Respond message mode in the production profile, if specified

4. The B2B Lookup service either runs the default business process if none was specified in the profile, or runs the business process specified in the production profile for Respond message mode.

5. The B2B Lookup service starts the appropriate communications adapter.

6. The communications adapter sends a message to the production transport server of the trading partner.

Using the B2B Respond Service

To use the B2B Respond service:

1. In your business process, precede the B2B Respond service with the Assign service and configure it to assign the contract ID to b2b-contract-id or the contract name to b2b-contract-name.

2. Include the B2B Respond service in the business process.

B2B Request-Response Service

The B2B Request-Response service uses the production (sending) profile of a contract to send a request to, and to retrieve a response from, the production trading partner.

How the B2B Request-Response Service Works

When a business process includes the B2B Request-Response service:

1. The service runs as part of the business process.

2. The B2B Request-Response service starts the B2B Lookup service.

3. The B2B Lookup service locates:

♦ The production profile of the contract

♦ The transport protocol of the production profile

♦ The appropriate transport business process for the profile's transport protocol, or the business process associated with the Request-Response message mode in the production profile, if specified

4. The B2B Lookup service either runs the default business process if none was specified in the profile, or runs the business process specified in the production profile for Request-Response message mode.

5. The B2B Lookup service starts the appropriate communications adapter.

6. The communications adapter sends a message to the transport server of the production profile.

Using the B2B Request-Response Service

To use the B2B Request-Response service:

1. In your business process, precede the B2B Respond service with the Assign service and configure it to assign the contract ID to b2b-contract-id or the contract name to b2b-contract-name.

2. Include the B2B Request-Response service in the business process.

Implementing Business Process Specification Schemas (BPSS)

About BPSS

Gentran Integration Suite enables you to implement an ebXML *Business Process Specification Schema* (BPSS), which provides a standard structure for defining a business process. The BPSS contains the specification of business activities within a business process, which enables Gentran Integration Suite to assemble the activities according to business agreements among trading partners.

The BPSS uses trading partner information and ebXML *Collaboration Protocol Agreement* (*CPA*) specifications to show the relationship among trading partners, a business process, and Gentran Integration Suite. Trading partner information and a CPA reference the BPSS and serve as configuration files for running business processes to exchange data with trading partners.

Implementing a BPSS and a CPA in Gentran Integration Suite

To implement a BPSS, you must complete the following steps in order:

1. Create an XML version of the BPSS using the text editor in Gentran Integration Suite or any text editor.
2. Check the BPSS (.xml file) in.
3. Create an XML version of the CPA using the text editor in Gentran Integration Suite or any text editor.
4. Check in the CPA (.xml file) in.

Checking in a BPSS

There are two ways to check in a BPSS:

✦ You can check in an XML version (.xml file) of a BPSS that you have previously created.
✦ You can use the text editor in Gentran Integration Suite to either type or copy XML to create an XML version of the BPSS and then check in the .xml file.

Using an XML Version

To check in an XML version (.xml file) of a BPSS that you have previously created:

1. From the **Deployment** menu, select **EBXML** > **BPSS**.
2. Next to Check in new BPSS schema, click **Go!**
3. In the **Name** field, type the name located in the BPSS Process Specification element.
4. Under **Select an input mode for defining the new BPSS schema**, select **Check-in BPSS Schema** and click **Next**.

5. In the **BPSS schema filename (.xml)** field, type or click **Browse** to select the file name of the BPSS.

6. In the **Check-in Comments** field, type a comment that helps identify the BPSS.

7. In the **Encoding Type** field, select the character encoding type for the BPSS and click **Next**.

8. Verify that **Enable for Business Processes** is selected and click **Finish** to check the BPSS in.

Using the Text Editor

To use the text editor in Gentran Integration Suite to create and check in an XML version of a BPSS:

1. From the **Deployment** menu, select **EBXML** > **BPSS**.

2. Next to Check in new BPSS schema, click **Go!**

3. In the **Name** field, type the name located in the BPSS Process Specification element.

4. Under **Select an input mode for defining the new BPSS schema**, select **BPSS Schema Text Editor** and click **Next**.

5. In the **Description** field, type a description that helps identify the BPSS.

6. In the **BPSS Schema** field, either type or copy and paste the XML code that makes up the BPSS, and click **Next**.

7. Verify that **Enable for Business Processes** is selected and click **Finish** to check the BPSS in.

Importing and Exporting a BPSS

To import or export a BPSS:

1. From the **Deployment** menu, select **Resource Manager > Import/Export**.

2. Depending on whether you want to import or export a BPSS, next to the appropriate heading, click **Go!**

3. Type a file name or click **Browse** to locate the file you want to import or export, then click **Next**.

4. The import/export process completes.

Creating a BPSS Extension

Create a BPSS extension to assign any business processes to the requesting or responding activities in the schemas.

To create a BPSS extension:

1. From the **Deployment** menu, select **EBXML** > **BPSS Extension**.

2. Next to Create new BPSS Extension, click **Go!**

3. Complete the following fields and click **Next**:

Field	Description
CPA Id	CPA ID. Optional.
BPSS Name	Name of BPSS schema. Optional.
BPSS Version	Schema version. Optional.
BPSS Extension Name	Name for the new extension. Required.

4. Select a Binary Collaboration and an internal process for all requesting or responding activities. Click **Next**.

5. Verify your changes and click **Finish** to create the extension.

You are now ready to check in a CPA for the BPSS.

Checking in a CPA

After checking in a BPSS, you can check in a CPA. The process to check in a CPA is similar to the process to check in a BPSS. There are two ways to check in the CPA:

✦ You can use an XML version (.xml file) of the CPA that you have previously created and check it in.

✦ You can use the text editor in Gentran Integration Suite to either type or copy XML to create an XML version of the CPA and check in the .xml file.

Using an XML Version of the CPA

To check in an XML version (.xml file) of the CPA that you have previously created:

1. From the **Deployment** menu, select **EBXML** > **CPA**.

2. Next to Check in new CPA specification, click **Go!**

3. In the **Name** field, type a value defined as the cpaid attribute, under the CollaborationProtocolAgreement element of the CPA.

4. Under **Select an input mode for defining the new CPA specification**, select **Check-in CPA Specification** and click **Next**.

5. In the **CPA Specification filename (.xml)** field, type or click **Browse** to select the file name of the CPA.

6. In the **Check-in Comments** field, type a comment that helps identify the CPA.

7. From the **Encoding Type** list, select the character encoding type for the CPA and click **Next**.

8. Verify that **Enable for Business Processes** is selected and click **Finish** to check the CPA in.

Using the Text Editor

To use the text editor in Gentran Integration Suite to either type or copy XML to create an XML version of the CPA and check in the .xml file:

1. From the **Deployment** menu, select **EBXML** > **CPA**.

2. Next to Check in new CPA specification, click **Go!**

3. In the **Name** field, type a value defined as the cpaid attribute, under the CollaborationProtocolAgreement element of the CPA.

4. Under **Select an input mode for defining the new CPA specification**, select **CPA Specification Text Editor** and click **Next**.

5. In the **Description** field, type a description that helps identify the CPA.

6. In the **CPA Specification** field, either type or copy and paste the XML code that makes up the CPA, and click **Next**.

7. Verify that **Enable for Business Processes** is selected and click **Finish** to check the CPA in.

About ebXML

When implementing ebXML, consider that ebXML fails to retrieve dsig key cert from CPA because the XPath in the BPML is wrong and fails to test Ping/Pong.

To correct this, you must edit the following two business processes:

✦ ebXMLMessaging
✦ ebXMLInbound

Editing ebXMLMessaging

To edit ebXMLMessaging:

1. Search for the text "signCertificateIdentifier." This text is the *to* attribute of the assign tag within the ebXMLDSig service.

2. Edit the xpath of the 'from' attribute to "cpa/tp:CollaborationProtocolAgreement/tp:PartyInfo[1]/tp:Certificate[@tp:certId/text() = //ProcessData/cpa/tp:CollaborationProtocolAgreement/tp:PartyInfo[1]/tp:DocExchange/tp:ebXMLSenderBinding/tp:SenderNonRepudiation/tp:SigningCertificateRef/@tp:certId/text()]/ds:KeyInfo/ds:KeyName/text()"

ebXMLInbound

To edit ebXMLInbound:

1. Search for the text "signCertificateIdentifier". This text is the 'to' attribute of the assign tag within the ebXMLDSig service.

2. Edit the xpath of the 'from' attribute to
   "request/tp:CollaborationProtocolAgreement/tp:PartyInfo[1]/tp:Certificate[@tp:certId/text() =
   //ProcessData/request/tp:CollaborationProtocolAgreement/tp:PartyInfo[1]/tp:DocExchange/tp:ebXM
   LSenderBinding/tp:SenderNonRepudiation/tp:SigningCertificateRef/@tp:certId/text()]/ds:KeyInfo/ds
   :KeyName/text()"

3. To enable ebXML to test Ping/Pong, search for the text "isAcknowledgement"

4. Add two conditions into this rule:

   "or
   IboundMIME/mime:message/mime:body/mime:message[1]/mime:body/SOAP-ENV:Envelope/SOAP
   -ENV:Header/eb:MessageHeader/eb:Action/text() = 'Ping'"

   and

   "or
   InboundMIME/mime:message/mime:body/mime:message[1]/mime:body/SOAP-ENV:Envelope/SOA
   P-ENV:Header/eb:MessageHeader/eb:Action/text() = 'StatusRequest'"

ebXML CPA Lookup

Because ebXML CPA Lookup does not output a unique service name, you must edit the ebCPALookup.xslt
business process.

To edit ebCPALookup.xslt business process:

1. Search for the text "tp:Service."

2. Replace the following paragraph:

```
<xsl:choose>
<xsl:when test="$action!=''">
<tp:ServiceBinding>
<xsl:copy-of elect="tp:CollaborationRole/tp:ServiceBinding/tp:Service"/>
<xsl:if test="($flag='outgoing' and tp:PartyId/text() = $partyId) or
($flag='incoming' and tp:PartyId/text() != $partyId)">
<xsl:copy-of
select="tp:CollaborationRole/tp:ServiceBinding/tp:CanSend[tp:ThisPartyActionBinding/
@tp:action=$action] |
tp:CollaborationRole/tp:ServiceBinding/tp:CanReceive/tp:CanSend[tp:ThisPartyActionBi
nding/@tp:action=$action]"/>
</xsl:if>
<xsl:if test="($flag='outgoing' and tp:PartyId/text() != $partyId) or
($flag='incoming' and tp:PartyId/text() = $partyId)">
<xsl:copy-of
select="tp:CollaborationRole/tp:ServiceBinding/tp:CanReceive[tp:ThisPartyActionBindi
ng/@tp:action=$action] |
tp:CollaborationRole/tp:ServiceBinding/tp:CanSend/tp:CanReceive[tp:ThisPartyActionBi
nding/@tp:action=$action]"/>
</xsl:if>
</tp:ServiceBinding>
</xsl:when>
<xsl:otherwise>
```

```
<tp:ServiceBinding>
<xsl:copy-of select="tp:CollaborationRole/tp:ServiceBinding/tp:Service"/>
<xsl:if test="($flag='outgoing' and tp:PartyId/text() = $partyId) or
($flag='incoming' and tp:PartyId/text() != $partyId)">
<xsl:copy-of
select="tp:CollaborationRole/tp:ServiceBinding/tp:CanSend[tp:ThisPartyActionBinding/
tp:ActionContext/@tp:binaryCollaboration=$binaryCollaboration and
tp:ThisPartyActionBinding/tp:ActionContext/@tp:businessTransactionActivity=$business
TransactionActivity and
tp:ThisPartyActionBinding/tp:ActionContext/@tp:requestOrResponseAction=$requestOrRes
ponseAction] |
tp:CollaborationRole/tp:ServiceBinding/tp:CanReceive/tp:CanSend[tp:ThisPartyActionBi
nding/tp:ActionContext/@tp:binaryCollaboration=$binaryCollaboration and
tp:ThisPartyActionBinding/tp:ActionContext/@tp:businessTransactionActivity=$business
TransactionActivity and
tp:ThisPartyActionBinding/tp:ActionContext/@tp:requestOrResponseAction=$requestOrRes
ponseAction]"/>
    </xsl:if>
    <xsl:if test="($flag='outgoing' and tp:PartyId/text() != $partyId) or
($flag='incoming' and tp:PartyId/text() = $partyId)">
    <xsl:copy-of
select="tp:CollaborationRole/tp:ServiceBinding/tp:CanReceive[tp:ThisPartyActionBindi
ng/tp:ActionContext/@tp:binaryCollaboration=$binaryCollaboration and
tp:ThisPartyActionBinding/tp:ActionContext/@tp:businessTransactionActivity=$business
TransactionActivity and
tp:ThisPartyActionBinding/tp:ActionContext/@tp:requestOrResponseAction=$requestOrRes
ponseAction] |
tp:CollaborationRole/tp:ServiceBinding/tp:CanSend/tp:CanReceive[tp:ThisPartyActionBi
nding/tp:ActionContext/@tp:binaryCollaboration=$binaryCollaboration and
tp:ThisPartyActionBinding/tp:ActionContext/@tp:businessTransactionActivity=$business
TransactionActivity and
tp:ThisPartyActionBinding/tp:ActionContext/@tp:requestOrResponseAction=$requestOrRes
ponseAction]"/>
    </xsl:if>
    </tp:ServiceBinding>
    </xsl:otherwise>
</xsl:choose>
```

with this paragraph:

```
<xsl:choose>
   <xsl:when test="$action!=''">
   <tp:ServiceBinding>
   <tp:Service><xsl:value-of select="$service"/></tp:Service>
   <xsl:if test="($flag='outgoing' and tp:PartyId/text() = $partyId) or
($flag='incoming' and tp:PartyId/text() != $partyId)">
   <xsl:copy-of
select="tp:CollaborationRole/tp:ServiceBinding/tp:CanSend[tp:ThisPartyActionBinding/
@tp:action=$action] |
tp:CollaborationRole/tp:ServiceBinding/tp:CanReceive/tp:CanSend[tp:ThisPartyActionBi
nding/@tp:action=$action]"/>
   </xsl:if>
   <xsl:if test="($flag='outgoing' and tp:PartyId/text() != $partyId) or
($flag='incoming' and tp:PartyId/text() = $partyId)">
   <xsl:copy-of
select="tp:CollaborationRole/tp:ServiceBinding/tp:CanReceive[tp:ThisPartyActionBindi
ng/@tp:action=$action] |
```

```
tp:CollaborationRole/tp:ServiceBinding/tp:CanSend/tp:CanReceive[tp:ThisPartyActionBi
nding/@tp:action=$action]"/>
    </xsl:if>
    </tp:ServiceBinding>
    </xsl:when>
    <xsl:otherwise>
    <tp:ServiceBinding>
    <xsl:if test="($flag='outgoing' and tp:PartyId/text() = $partyId) or
($flag='incoming' and tp:PartyId/text() != $partyId)">
    <tp:Service><xsl:value-of
select="tp:CollaborationRole/tp:ServiceBinding[tp:CanSend/tp:ThisPartyActionBinding/
tp:ActionContext/@tp:binaryCollaboration=$binaryCollaboration and
tp:CanSend/tp:ThisPartyActionBinding/tp:ActionContext/@tp:businessTransactionActivit
y=$businessTransactionActivity and
tp:CanSend/tp:ThisPartyActionBinding/tp:ActionContext/@tp:requestOrResponseAction=$r
equestOrResponseAction]/tp:Service/text() |
tp:CollaborationRole/tp:ServiceBinding[tp:CanReceive/tp:CanSend/tp:ThisPartyActionBi
nding/tp:ActionContext/@tp:binaryCollaboration=$binaryCollaboration and
tp:CanReceive/tp:CanSend/tp:ThisPartyActionBinding/tp:ActionContext/@tp:businessTran
sactionActivity=$businessTransactionActivity and
```

Creating a Basic Trading Partner Profile using FTP

To set up a basic trading partner profile using FTP:

1. From the **Administration** menu, select **Trading Partner > Basic**.

2. Under Create Trading Partner, Select Type of Exchange, select **General Document** and click **Next.**

3. On the Identity page, enter the following **trading partner information** and click **Next**:

Trading Partner Information Fields	Description
Name	Name of the trading partner for which you are creating the identity record. Required.
Identifier	Primary ID that identifies this trading partner. It could be a DUNS (Data Universal Numbering System) number, EDI interchange ID, e-mail address, or another unique string. Gentran Integration Suite uses the identifier to identify the trading partner for message protocols like AS2. Required.
Address Line 1	Conventional mailing address of this trading partner organization. Required.
Address Line 2	Conventional mailing address of this trading partner organization. Optional.
City	City where this trading partner is located. Required.
State or Province	State or province where the organization of this trading partner represented by the identity is located. Optional.
Zip or Postal Code	ZIP Code® or postal code where this trading partner is located. Required.
E-mail Address	E-mail address for the trading partner. Optional.
Telephone Number	Telephone number for the trading partner. Optional.
Time Zone	Select one of the timezones from the list. Optional.
Country	Select one of the countries from the list. Optional.

4. On the Protocol page, select **FTP** and click **Next**:

5. On the Communications page, enter the following information and click **Next**:

Communications Fields	Description
End Point IP	IP port that the server monitors for incoming sessions. Valid value is a valid IP port number. Optional.
End Point Port	Port number. Optional.
Directory	Name of a directory on the server of the trading partner where outbound data is stored and awaits pickup by the trading partner. Used for outbound sessions. Optional.

Communications Fields	Description
Protocol Mode	Mode or method that will be used by the protocol (FTP). Required. Valid values are: ◆ PUT – Send data to the remote party when making an FTP connection. ◆ GET – Receive data from the remote party.
Document	Document to be retrieved for selected protocol mode. Optional, if PUT is selected. **Note:** If you selected GET as the protocol mode, the document you specified must exist on the remote trading partner FTP server.
User ID	Unique ID associated with a transport record. Required for FTP.
Password	Password that authenticates the user ID. Required for FTP.

6. On the Confirm page, review the trading partner information and click **Finish** to add this trading profile.

7. Review the following defaulted information and click **Return** to continue:

   ◆ Transport Name

   ◆ Document Exchange Name

   ◆ Delivery Channel Name

   ◆ Packaging Name

   ◆ Profile Name

Creating a Basic Trading Partner Profile using HTTP

To set up a basic trading partner profile using HTTP:

1. From the **Administration** menu, select **Trading Partner > Basic**.

2. Under Create Trading Partner, Select Type of Exchange, select **General Document** and click **Next.**

3. On the Identity page, enter the following **trading partner information** and click **Next**:

Trading Partner Information Fields	Description
Name	Name of the trading partner for which you are creating the identity record. Required.
Identifier	Primary ID that identifies this trading partner. It could be a DUNS (Data Universal Numbering System) number, EDI interchange ID, e-mail address, or another unique string. Gentran Integration Suite uses the identifier to identify the trading partner for message protocols like AS2. Required.
Address Line 1	Conventional mailing address of this trading partner organization. Required.
Address Line 2	Conventional mailing address of this trading partner organization. Optional.
City	City where this trading partner is located. Required.
State or Province	State or province where the organization of this trading partner represented by the identity is located. Optional.
Zip or Postal Code	ZIP Code$^{®}$ or postal code where this trading partner is located. Required.
E-mail Address	E-mail address for the trading partner. Optional.
Telephone Number	Telephone number for the trading partner. Optional.
Time Zone	Select one of the timezones from the list. Optional.
Country	Select one of the countries from the list. Optional.

4. On the Protocol page, select **HTTP** and click **Next**:

5. On the Communications page, enter the following information and click **Next**:

Communications Fields	Description
End Point	Address where you can contact the server. Valid value is a valid IP address. Required.

6. On the Confirm page, review the trading partner information and click **Finish** to add this trading profile.

7. Review the following defaulted information and click **Return** to continue:

   ◆ Transport Name

   ◆ Document Exchange Name

- ◆ Delivery Channel Name
- ◆ Packaging Name
- ◆ Profile Name

Creating a Basic Trading Partner Profile using SMTP

To set up a basic trading partner profile using SMTP:

1. From the **Administration** menu, select **Trading Partner > Basic**.

2. Under Create Trading Partner, Select Type of Exchange, select **General Document** and click **Next.**

3. On the Identity page, enter the following **trading partner information** and click **Next**:

Trading Partner Information Fields	Description
Name	Name of the trading partner for which you are creating the identity record. Required.
Identifier	Primary ID that identifies this trading partner. It could be a DUNS (Data Universal Numbering System) number, EDI interchange ID, e-mail address, or another unique string. Gentran Integration Suite uses the identifier to identify the trading partner for message protocols like AS2. Required.
Address Line 1	Conventional mailing address of this trading partner organization. Required.
Address Line 2	Conventional mailing address of this trading partner organization. Optional.
City	City where this trading partner is located. Required.
State or Province	State or province where the organization of this trading partner represented by the identity is located. Optional.
Zip or Postal Code	ZIP Code$^{®}$ or postal code where this trading partner is located. Required.
E-mail Address	E-mail address for the trading partner. Optional.
Telephone Number	Telephone number for the trading partner. Optional.
Time Zone	Select one of the timezones from the list. Optional.
Country	Select one of the countries from the list. Optional.

4. On the Protocol page, select **SMTP** and click **Next**:

5. On the Communications page, enter the following information and click **Next**:

Communications Fields	Description
Mailbox Name	Mailbox name, alias, or ID number for a mail server. Required.
From	E-mail address of the sender. Required.
To	E-mail address of the receiver. Same as Mail To. Required

6. On the Confirm page, review the trading partner information and click **Finish** to add this trading profile.

7. Review the following defaulted information and click **Return** to continue:

- Transport Name
- Document Exchange Name
- Delivery Channel Name
- Packaging Name
- Profile Name

Creating a Basic Trading Partner Profile using AFT

To set up a basic trading partner profile using Advanced File Transfer (AFT):

1. From the **Administration** menu, select **Trading Partner > Basic**.

2. Under Create Trading Partner, Select Type of Exchange, select **File Transfer** and click **Next.**

3. On the Add Community Profile page, enter the following **information** and click **Next**:

Trading Partner Information Fields	Description
Community Name	Enter the community name for the files your are going to transfer. Optional.
Secret key for PGP signing	Select from the list. Optional.
Secret Key for PGP decryption	Select from the list. Optional.

Creating an Advance Trading Partner Profile

To set up an advanced trading profile, you must perform the following tasks, in this order:

1. Create an Identity Record
2. Create a Transport Record
3. Create a Document Exchange Record
4. Create a Delivery Channel Record
5. Create a Packaging Record
6. Create a Profile Record

Creating an Identity Record

To create an identity record:

1. From the **Administration menu**, select **Trading Partner > Advanced** > **Identities**.

2. Under Create, next to New Identity, click **Go!**

3. On the Identities page, do one of the following:

   ◆ To create an identity record that inherits all the components of an existing trading profile, select an identity record from **Select Base Identity**, and click **Next**.

   ◆ To specify properties, leave **Select Base Identity** blank, and click **Next**.

4. On the Information page, complete the following fields and click **Next**:

Information Fields	Description
Name	Name for the identity record to create for this trading profile. Required.
Reference URL	Uniform Resource Locator (URL) is the Internet address of the trading partner. Optional.
DUNS	Data Universal Numbering System (DUNS) is a unique nine-character company identification number issued by Dun & Bradstreet Corporation. Optional.
Identifier	Primary ID of this identity record. It could be a DUNS number, EDI interchange ID, e-mail address, or another unique string. Gentran Integration Suite uses the identifier to identify the trading partner for message protocols like AS2. Required.
Address Line 1	Conventional mailing address of the trading partner organization. Required.
Address Line 2	Additional mailing address information of the trading partner organization. Optional.
City	City where the trading partner is located. Required.
State or Province	State or province where the organization of the trading partner represented by the identity is located. Optional.
Zip or Postal Code	ZIP Code or postal code where the trading partner is located. Required.
E-mail Address	E-mail address of the trading partner. Optional.
Telephone Number	Telephone number of the trading partner. Optional.
Time Zone	Time zone where the trading partner is located. Optional.
Country	Country where the trading partner is located. Optional.
Federation Peers	Discovery point URL for the trading partner you want to associate this identity with. Optional.

5. Click **Finish** to add the identity.

6. Click **Return** to continue.

Creating a Transport Record

To create a transport record:

1. From the **Administration** menu, select **Trading Partner > Advanced** > **Transport**.

2. Under Create, next to New Transport, click **Go!**

3. On the Transports page, complete the following fields and click **Next**:

Information Fields	Description
Name	Name for the transport record to create for this trading profile. Required.
Identity	In order to link the transport record to the identity record, select the identity record name from the list. Required.

4. On the Communications page, complete the following fields and click **Next**:

Communication Fields	Description
Receiving Protocol	Communications protocol supported by this transport when receiving data. Valid values are FTP, HTTP, and SMTP. Required.
Sending Protocol	Communications protocol supported by this transport when sending data. Valid values are FTP, HTTP, SMTP, and blank. Optional.
End Point IP	IP address to contact the server. Valid value is a valid IP address. Optional.
End Point Port	Port that the server monitors for incoming sessions. Valid value is a valid port number. Optional.

5. In step 4, if you selected:

   ◆ FTP as the receiving protocol, go to *Specifying FTP Settings* on page 49.

   ◆ HTTP as the receiving protocol, go to *Specifying HTTP Settings* on page 52.

   ◆ SMTP as the receiving protocol, go to *Specifying SMTP Settings* on page 54.

Specifying FTP Settings

To specify FTP settings as part of a transport record:

1. On the Transfer Settings page, complete the following fields and click **Next**:

Transfer Settings Fields	Description
Transfer Mode	Which party initiates an FTP session through a network firewall. The default transfer mode, ACTIVE, indicates that Gentran Integration Suite makes the connection to clients. PASSIVE transfer mode indicates that clients make the connection. Required.

Transfer Settings Fields	Description
Directory	Name of a directory on the server of the trading partner where outbound data is stored and awaits pickup by the trading partner. Used for outbound sessions. Optional.
Local Data Port Range	Local control port numbers to be used on the server of the trading partner to establish an FTP connection for data transfers. Valid value is any positive number that is optimal for your system. Zero (0) enables the operating system to select a port number. Optional.
Local Control Data Port Range	Local control port number to use for control/command connections for the control channel. Used for outbound sessions. Select a port that is not used by another application on the system. Zero (0) enables the operating system to select a port number. Optional.

2. On the Protocol Settings page, complete the following fields and click **Next**:

Protocol Settings Fields	Description
Response Timeout (sec)	Number of seconds to wait for remote response to an outbound queue. Used for outbound sessions. Valid value is number of seconds. Zero (0) indicates wait indefinitely. Optional.
Firewall Proxy	IP address, port number, login ID, and password of the remote firewall. Used for outbound sessions. Separate values with a comma. If used, you must specify both login ID and password. Optional.
Firewall Connect Count	Number of seconds that Gentran Integration Suite attempts to contact the transport port address before timing out. Optional.
Socket Timeout (sec)	Number of seconds to wait for remote response to a command. Valid value is any positive number that is optimal for your system. Zero (0) indicates wait indefinitely. Optional.

3. On the Security page, complete the following fields and click **Next**:

Security Fields	Description
SMIME Encryption User Certificate	Encryption certificate of the trading partner. The EDIINT Message service uses the certificate to encrypt messages. Optional.
SMIME Decryption Certificate (System Store)	Optional. Valid values are: ◆ B2BHttp ◆ UIKey ◆ OpsDrv ◆ OpsKey

Security Fields	Description
SSL	Whether Secure Sockets Layer (SSL) must be active. Required. Valid values are: ◆ NONE – SSL is not used by the transport. ◆ OPTIONAL – FTP handles SSL encryption appropriately if present. ◆ MUST – Transport uses this protocol configured for SSL encryption (default). **Note:** If OPTIONAL or MUST is specified, the asset protection key must allow SSL for the appropriate protocol.
Key Certificate Passphrase	Passphrase that protects the server key certificate. Required, if SSL value is anything other than NONE.
Cipher Strength	Strength of the algorithms used to encrypt data. Optional. Valid values are: ◆ ALL ◆ WEAK – Required for international e-business if government regulations prohibit STRONG encryption from being exported. ◆ STRONG – Required if SSL value is anything other than NONE (default).
Key Certificate (System Store)	Private key and certificate for the component. Used to encrypt and decrypt messages. Also used by the EDIINT Message service as the key for decrypting encrypted messages. Required, if SSL value is anything other than NONE.
CA Certificates	Certificate used to validate the certificate of the trading partner. This is the public key. Required if the Server SSL value is Must or Optional.

4. On the Protocol Mode page, complete the following fields and click **Next**:

Protocol Mode Fields	Description
Protocol Mode	Mode or method that will be used by the protocol (FTP). Required. Valid values are: ◆ PUT – Send data to the remote party when making an FTP connection. ◆ GET – Receive data from the remote party.
Document	Document to be retrieved for selected protocol mode. If mode is GET, can leave the field blank. Optional if PUT is selected. **Note:** If you selected GET as the protocol mode, the document you specified must exist on the remote trading partner FTP server.

5. On the Transport Account page, complete the following fields and click **Next**:

Transport Account Fields	Description
User ID	Unique ID associated with a transport record. Optional.
Password	Password that authenticates the user ID. Optional.
Confirm Password	Password typed in the Password field. Optional.

6. Click **Finish** to add the transport record.

7. Click **Return** to continue.

Specifying HTTP Settings

To specify HTTP settings as part of a transport record:

1. On the End Point Settings page, complete the following fields and click **Next**:

End Point Fields	Description
End Point	HTTP address of the transport. It can be a URL. For AS2, the end point must be the complete URL to send messages. Required.
End Point Type	Purpose of this end point. Required. Valid values are: ◆ Login – Address where the initial HTTP session is established. ◆ Request – Address to which HTTP request messages are sent. ◆ Response – Address to which response messages are sent. ◆ Error – Address to which HTTP error messages are sent. ◆ All Purpose – End port can be used for login, request, response, or error messages.

2. On the Protocol Settings page, complete the following fields and click **Next**:

Protocol Settings Fields	Description
Response Timeout (seconds)	Number of seconds to wait for remote response to an outbound queue. Used for outbound sessions. Valid value is number of seconds. Zero (0) indicates wait indefinitely. Optional.
Firewall Proxy	IP address, port number, login ID, and password of the remote firewall. Separate values with a comma. If used, you must specify both login ID and password. Used for outbound sessions. Optional.
Firewall Connect Count (seconds)	Number of seconds that Gentran Integration Suite attempts to contact port address of the transport before timing out. Optional.
Socket Timeout (seconds)	Number of seconds to wait for remote response to a command. Valid value is any positive number that is optimal for your system. Zero (0) indicates wait indefinitely. Optional.

3. On the Security page, complete the following fields and click **Next**:

Security Fields	Description
SMIME Encryption User Certificate	Encryption certificate of the trading partner. The EDIINT Message service uses the certificate to encrypt messages. Optional. **Note:** After receiving a trusted certificate from the trading partner and checking it in, you can select the certificate from this field.

Security Fields	Description
SMIME Decryption Certificate (System Store)	Optional. Valid values are: ◆ B2BHttp ◆ UIKey ◆ OpsDrv ◆ OpsKey
SSL	Whether Secure Sockets Layer (SSL) must be active. Optional. Valid values are: ◆ None – SSL is not used by the transport. ◆ Optional – FTP handles SSL encryption appropriately if present. ◆ Must – Transport uses this protocol configured for SSL encryption (default). **Note:** If Optional or Must is specified, the asset protection key must allow SSL for the appropriate protocol.
Key Certificate Passphrase	Passphrase that protects the server key certificate. Required if SSL value is anything other than None.
Cipher Strength	Strength of the algorithms used to encrypt data. Optional. Valid values are: ◆ ALL ◆ WEAK – Required for international e-business if government regulations prohibit STRONG encryption from being exported. ◆ STRONG – Required if SSL value is anything other than None (default).
Key Certificate (System Store)	Private key and certificate for the component. Used to encrypt and decrypt messages. Also used by the EDIINT Message service as the key for decrypting encrypted messages. Required, if SSL value is anything other than NONE. **Note:** After receiving a public key certificate from the trading partner and checking it in, you can select the certificate from this field.
CA Certificates	Certificate used to validate the certificate of the trading partner. This is the public key. Required, if the SSL value is Must or Optional.

4. On the Protocol Mode page, complete the following fields and click **Next**:

Protocol Mode Fields	Description
Protocol Mode	Mode or method that will be used by the protocol (FTP). Required. Valid values are: ◆ PUT – Send data to the remote party when making an FTP connection. ◆ GET – Receive data from the remote party.
Document	Document to be retrieved for selected protocol mode. If mode is GET, can leave the field blank. Optional if PUT is selected. **Note:** If you selected GET as the protocol mode, the document you specified must exist on the remote trading partner FTP server.

5. On the Transport Account page, complete the following fields and click **Next**:

Transport Account Fields	Description
User ID	Unique ID associated with a transport record. Optional.
Password	Password that authenticates the user ID to the system. Optional.
Confirm Password	Password typed in the Password field. Optional.

6. Click **Finish** to update the transport record.
7. Click **Return** to continue.

Specifying SMTP Settings

To specify SMTP settings as part of a transport record:

1. On the Security page, complete the following fields and click **Next**:

Security Fields	Description
SMIME Encryption User Certificate	Encryption certificate of the trading partner. The EDIINT Message service uses the certificate to encrypt messages. Optional.
SMIME Decryption Certificate (System Store)	Optional. Valid values are: ◆ B2BHttp ◆ UIKey ◆ OpsDrv ◆ OpsKey
SSL	Whether Secure Sockets Layer (SSL) must be active. Required. Valid values are: ◆ NONE – SSL is not used by the transport. ◆ OPTIONAL – FTP handles SSL encryption appropriately if present. ◆ MUST – Transport uses this protocol configured for SSL encryption (default). **Note:** If OPTIONAL or MUST is specified, the asset protection key must allow SSL for the appropriate protocol.
Key Certificate Passphrase	Passphrase that protects the server key certificate. Required if SSL value is anything other than NONE.
Cipher Strength	Strength of the algorithms used to encrypt data. Optional. Valid values are: ◆ ALL ◆ WEAK – Required for international e-business if government regulations prohibit STRONG encryption from being exported. ◆ STRONG – Required if SSL value is anything other than NONE (default).

Security Fields	Description
Key Certificate (System Store)	Private key and certificate for the component. Used to encrypt and decrypt messages. Required if SSL value is anything other than NONE. Also used by the EDIINT Message service as the key for decrypting encrypted messages.
CA Certificates	Certificate used to validate the certificate of the trading partner. This is the public key. Required if the Server SSL value is Must or Optional.

2. On the SMTP Settings page, complete the following fields and click **Next**:

SMTP Settings Fields	Description
Mailbox Name	Mailbox name, alias, or ID number for a mail server. Required.
From	E-mail address of the sender. Required.
To	E-mail address of the receiver. Same as Mail To. Required.
CC	Carbon copy e-mail address. Optional.
BCC	Blind carbon copy e-mail address. Optional.

3. On the Transport Account page, complete the following fields and click **Next**:

Transport Account Fields	Description
User ID	Unique ID associated with a transport record. Optional.
Password	Password that authenticates the user ID. Optional.
Confirm Password	Password typed in the Password field. Optional.

4. Click **Finish** to update the transport record.
5. Click **Return** to continue.

Creating a Document Exchange Record

To create a document exchange record:

1. From the **Administration** menu, select **Trading Partner > Advanced** > **Document Exchange**.

2. Under Create, next to New Document Exchange, click **Go!**

3. On the Information page, complete the following fields and click **Next**:

Information Fields	Description
Name	Name for the document exchange record to create for this trading profile. Required.
Identity	Unique ID associated with the identity that links this document exchange record to the identity record. The ID must match the Name field of the identity record. Required.

4. On the Retry Settings page, complete the following fields and click **Next**:

Retry Setting Fields	Description
Number of Retries	Number of times that Gentran Integration Suite tries to contact the trading partner before timing out. Zero (0) is invalid. Required.
Retry Interval (sec)	Number of seconds that Gentran Integration Suite waits before trying again to contact the trading partner after the previous attempt timed out. Zero (0) is invalid. Required. **Note:** To avoid overwriting this Document Exchange portion of trading profile, manually set the Retry Interval field in an inherited document exchange every time you modify the same field in the base document exchange.
Persist Duration (sec)	Number of seconds that a message received is kept before being passed to the integration engine. Zero (0) is invalid. Required.

5. On the Enveloping Properties page, complete the following field and click **Next.** If you select None, go to step 7:

Enveloping Properties Fields	Description
Protocol	Used only by the EDIINT Message service. The security protocol to be used. Valid values are SMIME and NONE (default). Required.

6. On the Security page, complete the following fields and click **Next**:

Security Fields	Description
Encryption Algorithm	Used only by the EDIINT Message service if a payload type requiring encryption is selected. Identifies the encryption algorithm to be used. Required if Protocol value is anything other than None. Required.
	Supported algorithms are:
	◆ Triple DES 168 CBC with PKCS5 padding
	◆ 56-bit DES CBC with PKCS5 padding
	◆ 128-bit RC2 CBC with PKCS5 padding
	◆ 40-bit RC2 CBC with PKCS5 padding
Signing Algorithm	Used only by the EDIINT Message service to transfer data to the trading partner. Identifies the fixed-length of compressed representation of signed messages.Required.
	Valid values are:
	◆ MD5 – Message digest algorithm that verifies the integrity of data through a 128-bit message digest.
	◆ SHA1 – Secure hash algorithm that verifies the integrity of data through a 160-bit (20 byte) message digest. Transmission is a bit slower that MD5; however, the larger message digest size offers a more secure data transference.
Signing Key Certificate	Used only by the EDIINT Message service. The key certificate for the encryption key of the identity, if available, that is used to encrypt the message when using SMIME. Required if Message Symmetric Algorithm Strength is selected.
	Note: This is also the private key the EDIINT Message Service uses to sign messages it builds. A signing key certificate is not required if encryption is selected.
	Note: To guarantee that messages are signed, you must also select non-repudiation of origin when creating a delivery channel record.
Signing User Certificate	Used only by the EDIINT Message service. The trusted certificate for the signing certificate of the trading partner. Required if Signing Algorithm is selected.
	Note: This is also a trusted certificate that the EDIINT Message service uses to verify signatures on messages it receives.

7. Click **Finish** to add the document exchange record.

8. Click **Return** to continue.

Creating a Delivery Channel Record

To create a delivery channel record:

1. From the **Administration** menu, select **Trading Partner > Advanced** > **Delivery Channels**.

2. Under Create, next to New Delivery Channel, click **Go!**

3. On the Information page, complete the following fields and click **Next**:

Information Fields	Description
Name	Name for the delivery channel record to create for this trading profile. Required.
Identity	Unique ID that links the delivery channel record to the identity record. It must match the Name field of the identity record. Required.

4. On the Channel Definition page, complete the following fields and click **Next**:

Channel Definition Fields	Description
Transport	Name of the transport that links this delivery channel record to the transport records. It must match the Transport Name field of the transport record. Required.
Document Exchange	Name of the document exchange associated with this delivery channel record. It must match the Document Exchange Name field of the document exchange record. Required.

5. On the Security page, complete the following fields and click **Next**:

Security Fields	Description
Sync Reply Mode	What the receiving application expects in a response when bound to a synchronous communications protocol, such as HTTP. Required. Valid values are: ◆ Response Only – Only the business response message is returned. ◆ Signals and Response – Application returns the business response message in addition to one or more business signals. ◆ Signals Only – Response includes one or more business signals as defined in the ebXML Business Process Specifications Schema (ebBPSS), but not a business response message. ◆ msh Signals Only – Response includes errors or acknowledgments only. Business response messages or business signals must be returned asynchronously. ◆ NONE – No business response messages, business signals, or msh signals are returned (default).
Non Repudiation of Origin	Whether the message sender must sign the message with a digital certificate. Valid values are Yes and No. Required.

Security Fields	Description
Non Repudiation of Receipt	Whether the message receiver must sign the message with a digital certificate. Valid values are Yes and No. Required.
Secure Transport	Whether the delivery channel record uses a secure transport protocol such as SSL or IPSEC. Valid values are Yes and No. Required.
Confidentiality	Whether the message must be encrypted. Valid values are Yes and No. Required.
Authenticated	Whether the digital signature of the message must be checked to verify that it came from the expected sender and it has not been modified in transit or storage. Valid values are Yes and No. Required.
Authorized	Whether the message sender must be authorized (granted access to a network resource) before the message can be delivered to the application. Valid values are Yes and No. Required.

6. On the Delivery Settings page, complete the following fields and click **Next**:

Delivery Settings Field	Description
Receipt Type	Used only by the EDIINT Message service. The type of receipt to request. Valid values are Message Disposition Notification (MDN) and NONE (default). Required.
Receipt Signature Type	Used only by the EDIINT Message service to transfer data to the trading partner. Identifies the fixed-length of compressed representation of messages requested on receipts. Required. Valid values are: ◆ None ◆ MD5 – Message digest algorithm that verifies the integrity of data through a 128-bit message digest. ◆ SHA1 – Secure hash algorithm that verifies the integrity of data through a 160-bit (20 byte) message digest. Transmission is a bit slower that MD5; however, the larger message digest size offers a more secure data transference. **Note:** Selection of a value other than None prompts the EDIINT Message service to request a signed Message Disposition Notification (MDN) when building messages to the trading partner.
Receipt Timeout	Timeout value for receipt of expected MDNs, in seconds. Optional.
Delivery Mode	Used only by the EDIINT Message service to deliver receipts for messages received. Required. Valid values are: ◆ Asynchronous HTTP – Used for AS2 and RosettaNet if you want an asynchronous receipt. ◆ Asynchronous HTTPS – Used for AS2 if you want an asynchronous receipt. ◆ Asynchronous SMTP – Used for AS1 and AS2 if you want an asynchronous receipt. ◆ Synchronous – Used for AS2 if you want a synchronous receipt.

Delivery Settings Field	Description
Receipt to Address	Used only by the EDIINT Message service. Indicates where a receipt must be sent if it is not going to the e-mail address in the associated identity. Required if you are using EDIINT AS2 requesting asynchronous MDNs. You must type the complete URL where you want the message to be sent. Required.

7. Click **Finish** to add the delivery channel record.

8. Click **Return** to continue.

Creating a Packaging Record

To create a packaging record:

1. From the **Administration menu**, select **Trading Partner > Advanced** > **Packaging**.

2. Under Create, next to New Packaging, click **Go!**

3. On the Information page, complete the following fields and click **Next**:

Information Fields	Description
Name	Name for the packaging record to create for this trading profile. Required.
Message Parsable	Whether the message can be parsed. Valid values are Yes and No. Required.

4. On the Packaging Settings page, complete the following fields and click **Next**:

Packaging Setting Fields	Description
Payload Type	Used only by the EDIINT Message service to create EDIINT messages. The payload is the document at the inner level of the message. The payload type describes the message format for transporting documents. Required. Valid values are: ◆ Plain Text – Payload is not signed and it is not encrypted. ◆ Signed Detached – Payload is signed with a detached signature, according to the EDIINT specifications. ◆ Encrypted – Payload is encrypted according to the EDIINT specifications. ◆ Signed Detached Encrypted – Payload is signed with a detached signature and then encrypted, according to the EDIINT specifications (default).
MIME Type	Used only by the EDIINT Message service. Indicates how to package the lowest level of payload content (the document at the inner level of a message) to be sent. Helps to implement the EDIINT specification correctly, and provides some flexibility, because receiving programs might expect a specified MIME type and sub-type. Required. Valid values are: ◆ Text – For XML or text ◆ Application – For EDI or any other type of data ◆ Message ◆ Audio ◆ Video ◆ Image

Packaging Setting Fields	Description
MIME Sub Type	Used only by the EDIINT Message service. Indicates how to package the lowest level of payload content (the document at the inner level of a message) to be sent. Required. Valid values are: ◆ EDI-X12 (default) ◆ EDIFACT ◆ EDI-Consent ◆ Octet-stream – For any type of data ◆ XML ◆ Plain
Compress Data	Used only by the EDIINT Message service. Specifies whether the payload must be compressed. Required. Valid values are: ◆ None ◆ Low ◆ Medium ◆ High ◆ Default

5. Click **Finish** to add the packaging record.

6. Click **Return** to continue.

Creating a Trading Partner Profile Record

To create a trading partner profile record:

1. From the **Administration** menu, select **Trading Partner > Advanced** > **Profiles**.

2. Next to Create New Profile, click **Go!**

3. On the Information page, complete the following fields and click **Next**:

Information Fields	Description
Name	Name for the profile record to create for this trading profile. Required.
Identity	Unique ID that links this profile to the identity record. It must match the Name field of the identity record. Required.

4. On the Profile Definition page, complete the following fields and click **Next**:

Profile Fields	Description
Profile Type	Type of profile used for data exchanged for this trading profile. Required. Valid values are: ◆ EDI (Electronic Data Interchange) ◆ AS1 (Applicability Statement 1) ◆ AS2 (Applicability Statement 2) ◆ RN (RosettaNet)
GLN	Global location number of this trading partner. Optional.
Delivery Channel	Unique ID that links this profile to the delivery channel record. It must match the Name field of the delivery channel record. Required.
Packaging	Unique ID that links this trading profile to the packaging record. It must match the Name field of the packaging record. Required.
Provider	Any third-party service provider name. Required.

5. If you selected RN for the profile type, you get another page specific to trading partners who use RosettaNet standards. Complete and click **Next** to continue.

6. On the Business Processes page, complete one of the following steps and click **Next**:

   ◆ To enable the predefined business process (default) to communicate with the trading partner for the specified mode, verify that **Not Applicable** is selected from the appropriate message mode list or lists (Send, Respond, Request Response).

◆ To select a business process other than the predefined business process (default) to communicate with the trading partner for the specified mode, select the business process from the appropriate message mode list or lists (Send, Respond, Request Response).

Note: To communicate with a trading partner, the business process must include the B2B Send, B2B Respond, or B2B Request-Response service.

7. Click **Finish** to add the profile record.

8. Click **Return** to continue.

Updating a Basic or Advanced Trading Partner Record

To update a basic or advanced profile trading partner record:

1. From the **Administration** menu, select **Trading Partner > Advanced** > **Record Name**.

Note: Where **Record Name** is one of the following:

- Identities
- Transports
- Document Exchange
- Delivery Channels
- Packages
- Profiles

2. Use Search or List to locate the record you want to change**.**

3. Next to the record name, click **Edit**.

4. On the Information page of the trading partner record, make changes and click **Next** until you reach the Confirm page.

5. Click **Finish** to update the trading partner record.

6. Click **Return** to continue.

Disabling a Trading Partner Record

To disable a trading partner record:

1. From the **Administration** menu, select **Trading Partner > Advanced** > **Record Name**.

Note: Where **Record Name** is one of the following:

- Identities
- Transports
- Document Exchange
- Delivery Channels
- Packages
- Profiles

2. Use Search or List to locate the record you want to disable**.**
3. Next to the record name, deselect the **Enabled** box. The record is disabled.
4. Click **Return** to continue.

Deleting a Trading Partner Record

To delete a trading partner record:

1. From the **Administration** menu, select **Trading Partner > Advanced** > **Record Name**.

Note: Where **Record Name** is one of the following:

- ◆ Identities
- ◆ Transports
- ◆ Document Exchange
- ◆ Delivery Channels
- ◆ Packages
- ◆ Profiles

2. Use Search or List to locate the record you want to delete**.**
3. Next to the record name, click **Delete**.
4. In the confirmation box, click **OK**.
5. On the Summary page click **Next**.
6. On the Confirm page, click **Delete**. The record is deleted.
7. Click **Return** to continue.

Searching for Trading Partners

To search for a trading partner that is related to one of your communities:

Note: To search for trading partners not associated with a community, use the search feature on the Community Management menu by selecting **Trading Partner > Advanced > Profiles**.

1. From the **Community Management** menu, select **Trading Partners > Search Trading Partners**.

2. Type all or none of the search criteria to narrow your search and click **Go!** Search criteria includes:

    ◆ Trading Partner Name

    ◆ Trading Partner EDIID

    ◆ Community Name

    ◆ Document Activity From

    Gentran Integration Suite displays a list of trading partners that meet your search criteria.

3. Click **Return** to continue.

Adding a Trading Partner Manually

To manually add a trading partner:

Note: Before you can add a trading partner, you need to create a community.

1. From the **Community Management** menu, select **Trading Partners > Create Trading Partner**.

2. From the list, select the community you want to add a trading partner to and click **Next**.

3. Type the following trading partner information and click **Next**.

Trading Partner Fields	Description
Trading Partner Name	Name for this trading partner profile (cannot contain spaces). Required.
EDIID	Trading partner EDI ID. Optional.
Address	Trading partner mailing address. Optional.
City	Trading partner city. Optional.
State	Trading partner state. Optional.
Postal Code	Trading partner postal code. Required.
Phone	Trading partner phone number. Required.
Country	Trading partner country. Optional.
Time Zone	Trading partner time zone. Optional.
Email Address	Trading partner e-mail address. Required.

4. Select a communications protocol to be used with this trading partner. The list of protocols is populated by entries made when you created the community this trading partner will join.

5. Additional information is requested based on the protocol (FTP, HTTP, SMTP, AS2) selected. Complete the following information and click **Next**.

    FTP information:

FTP Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
Mode	Direction this profile will accept. Select inbound or outbound. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.
Directory	Location of FTP folder. Optional.
Local Port Range	Port range of the FTP server. Optional.
Control Port Range	Port range of the control/command connections. Optional.

HTTP information:

HTTP Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
Mode	Direction this profile will accept. Select inbound or outbound. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.

HTTP Fields	Description
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.

SMTP information:

SMTP Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.
Mailbox Name	SMTP mailbox name. Optional.
Mailbox ID	SMTP mailbox ID. Optional.
Mailbox Address	SMTP mailbox address. Optional.

AS2 information:

AS2 Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.
Send MDN receipt	When receiving an AS2 transmission, send receipt notify. Optional.
Storage Type	Store AS2 message using filesystem or mailboxing. Required.
System Certificate	Additional authentication when transmitting an AS2message. Optional.

6. Confirm the trading partner information and click **Finish**.

7. Click **Return** to continue.

Adding Your Public Information

Note: You can add only one Discovery Point URL and the URL cannot be used for both inside and outside the firewall connections.

To add your public information:

1. From the **Community Management** menu, select **Options > Discovery Profile**.

2. In the Name field, replace "Local Peer" with a new company name. This is the name that is displayed in your trading partner's federated systems peer list in the Admin Console when you join a hosted community.

   Caution: It is very important that you change this default value to better reflect your company's name. Otherwise, your company will display as "Local Peer" on your trading partner's federated systems peer list.

3. In the General Contact field, type the name of your company's contact person (optional).

4. In the Website field, type the URL for your company's Web site (optional).

5. In the General Information field, type additional information that your trading partners might find helpful (optional).

6. Click **Update**.

Checking Invitation Status

To monitor invitation status:

1. From the **Community Management** menu, select **Trading Partners > View Trading Partner > Pending**.

2. You can review any of the following trading partner invitation status:

   ◆ Click Registered, to review a list of trading partners that have registered for this community

   ◆ Click Invited, to review a list of who you have invited to join this community

   ◆ Click Pending, to review a list of pending invitations

   ◆ Click Rejected, to review the list of trading partners who have rejected an invitation to join.

Responding to the Invitation

After you have received the invitation e-mail to join a community:

1. Go to the URL in the invitation.
2. Select Yes (I have Gentran Integration Suite installed). The information page is displayed.
3. Select and copy the Discovery Point URL.
4. See the Joining a Community Using a Discover Location for further instructions.

Synchronizing Your Trading Partner Information

Note: The synchronization feature is not available for trading partners who were added manually.

Caution: If you delete a protocol from an existing community that has been joined by other trading partners, that community can no longer be synchronized.

To check for trading partner profile updates:

1. From the **Community Management** menu, select **Tools > Synchronize Partner Updates**.

2. The update process starts. The system checks for any changed trading partner or community information. When complete, the system notes if possible updates are available.

3. Click on the link provided to review any trading partner profile update information.

Updating Trading Partner Profiles

To get updated trading partner profile information:

1. From the **Community Management** menu, select **Tools > Get Trading Partner Updates**.

Note: If no updates are found, the following message is displayed "No non-synchronized profiles found."

2. The system lists the trading partners that have updates. Click a trading partner name to update.

3. The system retrieves the most recent updates. Click **Update** to add the changes to your system.

4. Click **Return** to continue.

Sending Trading Partner Messages

To send a message to all or some of your trading partners within a community:

1. From the **Community Management** menu, select **Tools > Send Partner Message**.
2. From the list, select the community you want to send a message to and click **Next**.
3. Check the box next to **Select All Trading Partners** or check individual trading partners to receive the message.
4. In the From Address line, type your company name or ID.
5. In the Subject line, type a descriptive subject for your message.
6. In the Message line, type your broadcast message.
7. When you are ready to send the notification, click **send e-mail**. A confirmation message is displayed.

Creating a New Community

To create a new community:

1. From the **Community Management** menu, select **Communities > Create Community**.

2. On the community information page, complete the following fields and click **Next**.

Community Information Fields	Description
Community Name	New name of the community you are adding. This should be a unique name since you might add more communities. Required.
EDI ID	Your company's EDI ID. Required.
Contact Name	Name of person at your company responsible for this community. Required.
Company's Name	Your company's name. Cannot contain spaces. Required.
Company's Address	Your company's mailing address. Required.
City	Your company's city. Required.
State	Your company's state. Required.
Postal Code	Your company's postal code. Required.
Phone	Your company's phone number. Required.
Country	Trading partner country. Optional.
Time Zone	Trading partner time zone. Optional.
Email	Your company's e-mail address. Required.

3. Select a Protocol Type from the list.

4. Depending on the protocol selected, complete the protocol information page according to the following tables, and click **Next**.

   FTP information:

FTP Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
Mode	Direction this profile will accept. Select inbound or outbound. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.
Directory	Location of FTP folder. Optional.
Local Port Range	Port range of the FTP server. Optional.
Control Port Range	Port range of the control/command connections. Optional.

   HTTP information:

HTTP Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
Mode	Direction this profile will accept. Select inbound or outbound. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.

HTTP Fields	Description
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.

SMTP information:

SMTP Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.
Mailbox Name	SMTP mailbox name. Optional.
Mailbox ID	SMTP mailbox ID. Optional.
Mailbox Address	SMTP mailbox address. Optional.

AS2 information:

AS2 Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.

AS2 Fields	Description
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.
Send MDN receipt	When receiving an AS2 transmission, send receipt notify. Optional.
Storage Type	Store AS2 message using filesystem or mailboxing. Required.
System Certificate	Additional authentication when transmitting an AS2message. Optional.

5. To add another protocol to this community, or the same protocol but different direction (inbound or outbound), click **Add**. Otherwise click **Next**.

    Caution: You can add only one AS2 profile to a community. If you try to add more than one AS2 profile, an error message is displayed. Click **Back** until you reach the Protocols page, then delete all but one AS2 profile. Complete the add community process as normal.

6. You can add a document type to this community for tracking purposes. Otherwise, click **Next** to bypass. Complete the document information page according to the following table and click **Add Document**.

Document Type Fields	Description
Document Name	Name of this document. Required.
Document Type	Document type. Required.
Standard	EDI standard Optional.
Version	EDI version. Optional.
Direction	Document direction - inbound or outbound. Required.

7. Review the document information and click **Next**.

8. You can add more documents at this time. Click **Add**, otherwise, click **Next**.

9. Review and confirm the community information and click **Finish**.

10. Click **Return** to continue.

Viewing Community Information

To view information about a community:

1. From the **Community Management** menu, select **Communities > View Communities**. A list of your communities is displayed.

2. Under My Hosted Communities or My Joined Communities, click **Edit** next to the community you want to view. The community information is displayed.

Updating Community Information

To update community information:

1. From the **Community Management** menu, select **Communities > View Communities**. A list of your communities is displayed.

2. Click **Edit** next to the community you want to make changes to.

3. Click **Edit** next to the information component you want to change.

   Note: You cannot delete a protocol that has been registered for use by a trading partner.

4. Make desired changes and click **Finish**.

5. Click **Return** to continue.

Note: If your changes are significant or affect your trading partners, you should send a broadcast message using Gentran Integration Suite.

Exporting a Community Profile

To export a community profile:

1. From the **Community Management** menu, select **Tools > Export Community Profile**.

2. On the Export Community Profile page, under Community Profile, select the community you want to export information from and click **Go!**

3. From the File Download window, click **Save** to save the generated file to your computer.

4. Click **Return** to continue.

Deleting a Community

To delete a community:

1. From the **Community Management** menu, select **Communities > View Communities**. A list of your communities is displayed.

2. Click **Delete** next to the community you want to delete.

3. Confirm the delete and click **OK**. The community is deleted.

Note: Although you have deleted the community, any trading partners who belonged to that community remain and you can access their information.

Joining a Community Using the Discovery Location

Note: Before you start this procedure, you need to know the Discovery Location URL.

To join a community using the Discovery Location:

1. From the **Community Management** menu, click **Communities > Join Community**.

2. Select **Discovery Location** and click **Next**.

3. Type or paste the Discovery URL and access code provided by your trading partner, then click **Next**.

4. Select the community you want to join, review the community details, then click **Next**.

5. Select the trading partner to use with this community. Only valid trading partners are listed. If one does not exist, you can create one. Click **Next**.

6. Review and confirm the protocol information populated based on what the community sponsor has entered on their system, then click **Nex**t.

7. If you selected AS2 as the protocol in step 6, you are asked how you would like to store the community protocol (mailbox or filesystem). Make a selection and click **Next**.

8. Confirm the summary information and click **Finish**.

9. Click **Return** to continue.

Joining a Community Using File Import

Note: If you use the file import method to join a community, and there is no synchronization of profile information, your trading partner must also add your trading partner profile information on their side to correspond with yours, and create a contract for this trading relationship.

To use a file to join a community:

1. From the **Community Management** menu, click **Communities > Join Community**.

2. Select **File Import** and click **Next**.

3. Browse to select the file to import from the file system and click **Next**.

4. Review community profile information and click **Next**.

5. Select or create the trading partner profile you will use with this community and click **Next**. If you choose to create a new profile, type your information in the following fields and click **Next**.

Trading Partner Profile Fields	Description
Trading Partner Name	Name for this trading partner profile (cannot contain spaces). Required.
EDI ID	Your EDI ID. Optional.
Address	Your mailing address. Optional.
City	Your city. Optional.
State	Your state. Optional.
Postal Code	Your postal code. Required.
Phone	Your phone number. Required.
Country	Your country. Optional.
Time Zone	Your time zone. Optional.
Email Address	Your e-mail address. Required.

6. Select a communications protocol to be used with this trading partner. The list of protocols is populated by entries made when you created the community this trading partner will join.

7. Based on the protocol selected, you might be required to provide additional information. Type any required information and click **Next**.

8. Review and confirm the community information and click **Finish**.

Joining a Community Manually

Note: Because you are manually entering your trading partner's information into your system, and there is no synchronization of profile information, your trading partner must also add your trading partner profile information on their side to correspond with yours, and create a contract for this trading relationship.

To manually join a community:

1. From the **Community Management** menu, click **Communities > Join Community**.

2. Select **Manually Enter Community** and click **Next**.

3. Complete the community information page according to the following table and click **Next**.

Community Information Fields	Description
Community Name	Name of the community you want to join. Must be typed exactly as it appears in the system. Required.
EDI ID	The community host's EDI ID. Required.
Contact Name	Name of person at the community's host responsible for this community. Required.
Company's Name	The community host's company name. Cannot contain spaces. Required.
Company's Address	The community host's mailing address. Required.
City	The community host's city. Required.
State	The community host's state. Required.
Postal Code	The community host's postal code. Required.
Phone	The community host's phone number. Required.
Email	The community host's e-mail address. Required.

4. Select a communications protocol to be used with this trading partner.

5. Based on your protocol selection, complete the protocol information page and click **Next**.

   FTP information:

FTP Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
Mode	Direction this profile will accept. Select inbound or outbound. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.

FTP Fields	Description
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile (optional). Use only if you want to add security. Optional.
Password	Unique password for this profile (optional). Use only if you want to add security to the Join Community process. Optional.
Directory	Location of FTP folder. Optional.
Local Port Range	Port range of the FTP server. Optional.
Control Port Range	Port range of the control/command connections. Optional.

HTTP information:

HTTP Fields	Description
Protocol Type	Protocol this community will accept. Required.
Protocol Name	Unique name for this profile. Required.
Mode	Direction this profile will accept. Select inbound or outbound. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.

SMTP information:

SMTP Fields	Description
Protocol Type	Protocol this community will accept. Required.

SMTP Fields	Description
Protocol Name	Unique name for this profile. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.
Mailbox Name	SMTP mailbox name. Optional
Mailbox ID	SMTP mailbox ID. Optional.
Mailbox Address	SMTP mailbox address. Optional.

AS2 information:

AS2 Fields	Description
Protocol Type	Protocol this community will accept . Required.
Protocol Name	Unique name for this profile. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.
Send MDN receipt	When receiving an AS2 transmission, send receipt notify. Optional.
Storage Type	Store AS2 message using filesystem or mailboxing. Required.
System Certificate	Additional authentication when transmitting an AS2message. Optional.

6. To add another protocol to this community, or the same protocol but different direction (inbound or outbound), click **Add**. Otherwise click **Next**.

7. You can add a document type to this community for tracking purposes. Otherwise, click **Next** to bypass. Complete the document information page according to the following table and click **Add Document**.

Document Type Fields	Description
Document Name	Name of this document. Required.
Document Type	Document type. Required.
Standard	EDI standard. Optional.
Version	EDI version. Optional.
Direction	Document direction (Inbound or Outbound). Optional.

8. Review the document information and click **Next**.

9. You can add more documents at this time. Click **Add**, otherwise, click **Next**.

10. Review and confirm the community information and click **Next**.

11. Select or create the trading partner profile you will use with this community and click **Next**. If you choose to create a new profile, type your information in the following fields and click **Next**.

Trading Partner Profile Fields	Description
Trading Partner Name	Name for this trading partner profile (cannot contain spaces). Required.
EDI ID	Your EDI ID. Optional.
Address	Your mailing address. Optional.
City	Your city. Optional.
State	Your state. Optional.
Postal Code	Your postal code. Required.
Phone	Your phone number. Required.
Country	Your country. Optional.
Time Zone	Your time zone. Optional.
Email Address	Your e-mail address. Required.

12. Select a communications protocol to be used with this trading partner. The list of protocols is populated by entries made when you created the community this trading partner will join.

13. Based on the protocol selected, you might be required to provide additional information. Type any required information and click **Next**.

14. Review and confirm the community information and click **Finish**.

15. Click **Return** to continue.

Joining a Community Using Onboarding

To complete the online registration, do the following:

1. Type your invite information and click **Next**.

Invite Information Fields	Description
User ID	ID you want to use to log in and access your community profile information. Required.
First Name	Your company contact first name. Required.
Last Name	Your company contact last name. Required.
Password	Create a password to use to log in and access your community profile information. Required.
Confirm Password	Type your password again. Required.
Email Address	Your company contact e-mail address. Required.

2. From the drop-down list, select the community you want to join and click **Next**. There might be only one community to choose from.

3. Type your profile information and click **Next**.

Profile Information Fields	Description
Trading Partner Name	Name for this trading partner profile (cannot contain spaces). Required.
EDIID	Trading partner EDI ID. Optional.
Address	Trading partner mailing address. Optional.
City	Trading partner city. Optional.
State	Trading partner state. Optional.
Postal Code	Trading partner postal code. Required.
Phone	Trading partner phone number. Required.
Country	Trading partner country. Optional.
Time Zone	Trading partner time zone. Optional.
Email Address	Trading partner e-mail address. Required.

4. From the drop-down list, select the protocol you want to use. There might be only one protocol to choose from.

5. Depending on the protocol selected, complete the following information and click **Next**.

   FTP information:

FTP Fields	Description
Mode	Direction this profile will accept. Select inbound or outbound. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security. Optional.
Directory	Location of FTP folder. Optional.
Local Port Range	Port range of the FTP server. Optional.
Control Port Range	Port range of the control/command connections. Optional.

   HTTP information:

HTTP Fields	Description
Mode	Direction this profile will accept. Select inbound or outbound. Required.
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security. Optional.

SMTP information:

SMTP Fields	Description
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security. Optional.
Mailbox Name	SMTP mailbox name. Optional.
Mailbox ID	SMTP mailbox ID. Optional.
Mailbox Address	SMTP mailbox address. Optional.

AS2 information:

AS2 Fields	Description
End Point	URL. Optional.
End Point IP	Server IP address. Optional.
End Point Port	Port number. Optional.
Response Timeout	Number of seconds to wait for a response before ending the session. Optional.
Firewall Proxy	IP address of your firewall proxy. Optional.
Firewall Connection Cnt	Timeout of firewall. Optional.
Socket Timeout	Number of seconds to wait for remote response to a command before ending the session. Optional.
User ID	Unique user ID for this profile. Use only if you want to add security. Optional.
Password	Unique password for this profile. Use only if you want to add security to the Join Community process. Optional.
Certificate	Additional authentication when transmitting an AS2message. This option may not be available. Optional.

6. Confirm your profile information and click **Finish**. Registration is complete. You will receive a confirmation e-mail shortly from your community administrator that registration is complete.

7. Click **Return** to continue.

Creating a Trading Partner Contract

To create a trading partner contract:

1. From the **Administration** menu, select **Trading Partner** > **Contracts**.

2. Under Create, next to New Contract, click **Go!**

3. On the Information page, complete the following fields and click **Next**:

Information Fields	Description
Name	Descriptive name of the contract. Required.
Start Date	Start date of the contract. Valid value is any date in the format *yyyy-mm-dd*. Must be less than or equal to End Date. Default value is the current date. Required.
End Date	Expiration date of the contract. Valid value is any date in the format *yyyy-mm-dd*. Must be greater than or equal to Start Date. Default value is one week from the current date. Required.
Status	State of the composition/negotiation process that creates the contract. Default value is SIGNED. Required. Valid values are: ◆ PROPOSED – Contract being negotiated by the parties. The first stage of negotiation. ◆ AGREED – Contract agreed upon by the parties. The next stage of negotiation. ◆ SIGNED – Contract signed by the parties. The final stage of negotiation. The contract is usable.

4. On the Contract Definition page, complete the following fields and click **Next**:

Contract Definition Fields	Description
Production Profile	Unique ID of the profile that acts as the producer in this contract. Values are displayed in format *identity name-profile name*. Required.
Consumption Profile	Unique ID of the profile that acts as the consumer in this contract. It must match the Name field of the profile record. Values are displayed in format *identity name-profile name.* Required*.*
Business Process	Unique ID of the business process for this contract. Optional.

5. Do you plan to use the contract with EDI?

   ◆ If Yes, go to step 6 to select an EDI extension.

   ◆ If No, select **None** and click **Next**. Click **Finish** to complete the contract.

6. On the Extensions page, select one of the following extension types:

✦ X12, complete the following fields and click **Next**:

X12 Extension Fields	Description
Sender ID	Coded identifier of the company or division sending the transaction. Valid value is 12 standard characters. Optional.
Receiver ID	Coded identifier of the company or division receiving the transaction. Valid value is 12 standard characters. Optional.
Interchange Test Indicator	Mode of operation mode to use for this extension. Required. Valid values are: ◆ Test ◆ Production ◆ Information
Group Version Release ID Code	Release identifier for this version of the group. Valid value is 12 standard characters. Required.
Transaction Set ID Code	Coded identifier of transaction set. Valid value is three standard characters. Required.

✦ EDIFACT, complete the following fields and click **Next**.

EDIFACT Extension Fields	Description
Sender ID	Interchange ID as it should appear on the interchange header segment sent to this company or division. Valid value is 12 standard characters. Optional.
Receiver ID	Interchange ID as it should appear on the message group header received from this company or division. Valid value is 12 standard characters. Optional.
Message Type	Transaction message type as determined by the information type in the header of the message group, which includes the message or by the information type in the transaction message. Valid value is six standard characters. Optional.
Message Version Number	Version number of the standard message. Valid value is three standard characters. Optional.
Message Release Number	Release number of the standard message. Valid value is three standard characters. Optional.
Interchange Test Indicator	Mode of operation mode to use for this envelope. Optional.

✦ CII, complete the following fields and click **Next**.

CII Extension Fields	Description
Sender ID	Coded name of the company or division sending the message group. Valid value is 12 standard characters. Optional.
Receiver ID	Coded identifier of the company or division receiving the message group. Valid value is 12 standard characters. Optional.

CII Extension Fields	Description
BPIDOrganization	Code identifier of organization (for example, EIAJ) that manages the standard message types. Valid value is four standard characters. Optional.
BPIDSub Organization	Code identifier of he classification for the message types. Valid value is two standard characters. Optional.
BPIDEdition	Code identifier of the version of the message types. Valid value is two standard characters. Optional.
InformationIDCode	Type of the standard message. Valid value is four standard characters. Required.

✦ ebXML (Electronic Business Extensible Markup Language), complete the following fields and click **Next**:

EbXML Extension Fields	Description
Message Order	Whether to preserve the order in which a trading partner sends messages to another trading partner. Required. Valid values are: ◆ Guaranteed ◆ Not Guaranteed
Ack Requested	Request an acknowledgement that notifies the sender that the receiver has received an interpretable interchange transmission. Required. Valid values are: ◆ Always ◆ Never ◆ Per message
Ack Signature Requested	Whether the trading partner receiving messages needs to sign the acknowledgement before sending messages back to the sender. Required. Valid values are: ◆ Always ◆ Never ◆ Per message
Dup Elimination	Used by the trading partner sending messages to determine whether the receiving MSH must eliminate duplicates. Required. Valid values are Yes and No.

EbXML Extension Fields	Description
Use BPSS	Whether to use Business Process Specification Schema (BPSS), which provides a standard structure for defining a business process, with this extension. Required. Valid values are Yes and No. If you select **Yes**, complete the following fields: ◆ BPSS Name ◆ BPSS Version ◆ Binary Collaboration ◆ Production Profile Role ◆ Consumption Profile Role
BPSS Name	Identifying name of the BPSS to use with this extension. Required.
BPSS Version	Version of the BPSS to use with this extension. Valid value is 1.1. Required.
Binary Collaboration	List of all the binary collaboration in the BPSS chosen above. Valid values are based on the selected BPSS. Required.
Production Profile Role	exBXML role in the profile associated with the message producer for both the receiver (requestor) and sender (provider). Required. Valid values are: ◆ requestor ◆ provider
Consumption Profile Role	exBXML role in the profile associated with the message consumer profile to define the sender (provider). Optional. Valid value is provider.
Time to Acknowledge Receipt (min)	Amount of time, in minutes, within which you must receive an acknowledgment. Optional.
Time to Acknowledge Acceptance (min)	Amount of time, in minutes, within which you must receive an acknowledgment. Optional.
Time to Perform (min)	Amount of time, in minutes, starting from the initiation of RequestingBusinessActivity, that the initiator of the transaction must receive a response. Optional. **Note:** Responses are business documents associated with the RespondingBusinesActivity transaction.
Retry Count	Gentran Integration Suite continues to retry attempts to complete a business transaction before timing out and waiting for receipt acknowledgement. To disable this feature, clear the check box. Optional.

✦ ACH (Automated Clearing House) and complete the following fields and click **Next**:

ACH Extension Fields	Description
DestinationID	Routing number of the ACH Operator or receiving point to which the message is being sent. Required.
OriginID	Routing number of the ACH Operator or sending point that is sending the message. Required.

7. Click **Finish** to add the extension.

8. Click **Return** to continue.

Updating a Trading Partner Contract

To update a trading partner contract:

1. From the **Administration** menu, select **Trading Partner** > **Contracts**.
2. Under List All, click **Go!**
3. Click **Edit** next to the trading partner contract you want to make changes to.
4. Make desired changes and click **Next**, until you have reviewed all of the contract data.
5. Click **Save**.
6. Click **Finish**.
7. Click **Return** to continue.

Deleting a Trading Partner Contract

To delete a trading partner contract:

1. From the **Administration** menu, select **Trading Partner** > **Contracts**.
2. Under List All, click **Go!**
3. Click **Delete** next to the trading partner contract you want to make changes to.
4. Confirm the delete and click **OK**.
5. Click **Next**.
6. Click **Delete**.
7. Click **Return** to continue.

Creating a Code List

To create a code list:

1. From the **Administration** menu, select **Trading Partner** > **Code Lists**.

2. Next to New Code List, click **Go!**

3. In the Naming page, complete the following fields and click **Next**:

Naming Fields	Description
Code List Name	Name of the code list. Required.
Sender Identity	Name of the sender, from the list of identity records. Optional.
Receiver Identity	Name of the receiver, from the list of identity records. Optional.

4. In the Codes page, click **add New Code** to add a new pair of codes.

5. In the Input Code Data dialog box, complete the following fields, and click **Save**:

Input Code Data Fields	Description
Sender Code	Code value of the sender that is cross-referenced to the code value of the receiver (for example, Blue). Required.
Receiver Code	Code value of the receiver that is cross-referenced to the code value of the sender (for example, Green). Required.
Description	Description of what the code of the sender and receiver refers to. Required.
Text1	Description or data relating to the sender and receiver code. Optional.
Text2	Description or data relating to the sender and receiver code. Optional.
Text3	Description or data relating to the sender and receiver code. Optional.
Text4	Description or data relating to the sender and receiver code. Optional.

6. Repeat steps 4 - 5 as needed to create additional code pairs. When you are finished, click **Next**.

7. Click **Finish** to add the code list.

8. Click **Return** to continue.

Updating a Code List

Note: Each time you edit a code list or its code pairs, you create another version of the code list or code pair.

To update a code list or a code pair:

1. From the **Administration** menu, select **Trading Partner** > **Code Lists**.

2. Search for the code list you want to edit.

3. In the Code Lists search results page, click **source manager** next to the name used to identify code lists for a specific sender and receiver.

4. In the Code List Source Manager page, click **edit** next to the code list to lock it.

5. In the Naming page, click **Next**.

6. In the Codes page, click **edit** next to the pair of codes you want to edit.

7. In the Input Code Data dialog box, complete the following fields and click **Save**:

Input Code Data Fields	Description
Sender Code	Code value of the sender that is cross-referenced to the code value of the receiver (for example, Blue). Required.
Receiver Code	Code value of the receiver that is cross-referenced to the code value of the sender (for example, Green). Required.
Description	Description of what the code of the sender and receiver refers to. Required.
Text1	Description or data relating to the sender and receiver code. Optional.
Text2	Description or data relating to the sender and receiver code. Optional.
Text3	Description or data relating to the sender and receiver code. Optional.
Text4	Description or data relating to the sender and receiver code. Optional.

8. In the Codes page, click **Next**.

   Note: Gentran Integration Suite uses the previously indicated pair of codes as the default version for this sender and receiver. If you want to specify this version as the default, select the version from the list under OTHER Versions.

9. Click **Next** to review the code pairs and click **Finish** to update the code list.

10. Click **Return** to continue.

Changing the Default Version of a Code List

To change the default version of a code pair of a code list:

1. From the **Administration** menu, select **Trading Partner** > **Code Lists**.

2. Search for the code list for which you want to create a new version.

3. In the Code Lists search results page, click **version manager** next to the name used to identify code lists for a specific sender and receiver.

4. In the Code List Version Manager page, next to code pair you want to set as the default code pair, click **Default**.

5. Click **Save**. The message "*Schema status has been successfully updated.*" confirms that you have set the new default version of the code pair.

6. Click **Return** to continue.

Searching for a Code List

To search for a code list, do one of the following:

1. From the **Administration** menu, select **Trading Partner** > **Code Lists**.

2. In the Search portion of the Code List page, complete one or more of the following fields, and click **Go!**

Code List Search Fields	Description
Code List Name	Partial or complete name of the code list. Optional.
Sender Identity	Name of the sender, from the list of identity records. Optional.
Receiver Identity	Name of the receiver, from the list of identity records. Optional.

3. Review the code lists that are displayed. Click **Return** to continue.

Enabling a Code List

Note: You must enable a code list to use it in map.

To enable a code list for use:

1. From the **Administration** menu, select **Trading Partner** > **Code Lists**.
2. Search for the code list that you want to view.
3. Next to the code list, click **version manager**.
4. Under Enabled, verify that the check box is selected.
5. Click **Save**.
6. Click **Return** to continue.

Copying a Code List

To copy a code list:

1. From the **Administration** menu, select **Trading Partner** > **Code Lists**.

2. Search for the code list you want to copy.

3. In the Code Lists search results page, click **copy** next to the code list you want to copy.

4. In the Naming page, complete the following fields and click **Next**:

Naming Fields	Description
Code List Name	Partial or complete name of the code list. Optional.
Sender Identity	Name of the sender, from the list of identity records. Optional.
Receiver Identity	Name of the receiver, from the list of identity records. Optional.

5. In the Codes page, click **add New Code** to add a pair of codes to the code list or click **edit** next to the pair of codes you want to edit.

6. In the Input Code Data dialog box, complete or edit the following fields and click **Save**:

Input Code Data Fields	Description
Sender Code	Code value of the sender that is cross-referenced to the code value of the receiver (for example, Blue). Required.
Receiver Code	Code value of the receiver that is cross-referenced to the code value of the sender (for example, Green). Required.
Description	Description of what the code value of the sender and receiver refers to. Required.
Text1	Description or data relating to the sender and receiver code. Optional.
Text2	Description or data relating to the sender and receiver code. Optional.
Text3	Description or data relating to the sender and receiver code. Optional.
Text4	Description or data relating to the sender and receiver code. Optional.

7. Click **Finish** to copy the code list.

8. Click **Return** to continue.

Creating a Version of a Code List

Note: Each time you update a code list or its code pairs, you create another version of the code list or code pair.

To create a version of a code list:

1. From the **Administration** menu, select **Trading Partner** > **Code Lists**.

2. Search for the code list for which you want to create a new code pair.

3. In the Code Lists search results page, click **source manager** next to the name used to identify code lists for a specific sender and receiver.

4. In the Code List Source Manager page, next to **Add New Code List Version**, click **Go!**

5. In the Naming page, click **Next**.

6. In the Codes page, click **add New Code**.

7. In the Input Code Data dialog box, complete the following fields and click **Save**:

Input Code Data Fields	Description
Sender Code	Code value of the sender that is cross-referenced to the code value of the receiver (for example, Blue). Required.
Receiver Code	Code value of the receiver that is cross-referenced to the code value of the sender (for example, Green). Required.
Description	Description of what the code of the sender and receiver refers to. Required.
Text1	Description or data relating to the sender and receiver code. Optional.
Text2	Description or data relating to the sender and receiver code. Optional.
Text3	Description or data relating to the sender and receiver code. Optional.
Text4	Description or data relating to the sender and receiver code. Optional.

8. In the Codes page, click **Next**.

   Note: Gentran Integration Suite uses the previously indicated code list as the default version for this sender and receiver. If you want to specify this version as the default, select the version from the list under OTHER Versions.

9. Click **Next** to review the new code pairs version and click **Finish** to update the code list.

10. Click **Return** to continue.

Deleting a Code List

To delete code list or a code pair:

1. From the **Administration** menu, select **Trading Partner** > **Code Lists**.

2. Search for the code list that contains the code pair to delete.

3. In the Code Lists search results page, click **source manager** next to the name used to identify code pair in a specific code list.

4. Next to the code pair, under Delete, select the check box.

5. Next to Delete Selected Versions, click **Go!**, and then click **OK**.

6. In the Resource Summary page, review the code pair information, and then click **Next**.

7. In the Confirm page, **Delete** to delete the code pair from the code list.

8. Click **Return** to continue.

Deleting Versions of a Code List

Note: You can delete an individual code list version or all versions of a code list.

To delete an individual code list or versions of a code list:

1. From the **Administration** menu, select **Trading Partner** > **Code Lists**.
2. Search for the code list that contains the version or versions you want to delete.
3. Next to the code list, click **source manager**.
4. Do one of the following and click **Next**:
    - ◆ To delete an individual code list version:
    - a. Next the version, under Delete, select the check box.
    - b. Next to Delete Selected Versions, click **Go!**
    - ◆ To delete all versions of this code list, next to Delete All Versions, click **Go!**
5. Click **Delete**.
6. Click **Return** to continue.

Adding Additional Community Access Codes to a Trading Partner Community

To add an additional community access code:

1. From the **Community Management** menu, select **Options > Community Access Codes**.

2. Click **Add**.

3. In the **Access Code** field, type an access code. You can use any combination or amount of letters and numbers.

4. In the **Group Name** field, type a name for this access code group. You can use any combination or amount of letter and numbers.

5. From the list of available communities, select one or more and click the right arrow to assign them to the selected access code.

6. Click **Finish**. A confirmation message is displayed.

7. Click **Return** to continue.

Updating Community Access Codes

To change a community access code:

1. From the **Community Management** menu, select **Options > Community Access Codes**.

2. Under Existing Codes, click **Edit** next to the access code you want to change.

3. Make changes to the access code, group name, or community permissions as desired.

4. Click **Update**. A confirmation message is displayed.

5. Click **Return** to continue.

Configuring the Basic Customer Import File System Adapter

To configure the BasicCustomerImport_FSA:

1. From the **Deployment** menu, select **Services > Configuration**.

2. Next to Service Name, type **Basic** and click **Go!**

3. Next to BasicCustomerImport_FSA, click **Edit**.

4. On the Name page, click **Next**. Do not change the information on this page or the adapter will not work as designed.

5. On the Collection page, click **Next**. Do not change the information on this page or the adapter will not work as designed.

6. On the Business Process page, click **Next**. Do not change the information on this page or the adapter will not work as designed.

7. On the Schedule Type page, configure the parameters to your requirements and click **Next**.

8. On the Schedule Settings page, configure the parameters to your requirements and click **Next**.

    Note: The parameters which are displayed depend on the selections you made for Schedule Type.

9. On the Schedule Exclusions page, configure the parameters to your requirements and click **Next**.

    Note: The parameters which are displayed depend on the selections you made for Schedule Type.

10. On the Extraction page, click **Next**. The fields on this page (listed below for your reference) do not require configuration.

    Note: The field names in parentheses represent the corresponding field names in the Graphical Process Modeler. This information is provided for your reference.

11. On the Confirm page, configure the parameter to your requirements and click **Finish**.

12. Click **Return** to continue.

Importing Trading Partner Data as a File Containing Envelopes and/or Control Numbers

To import a file containing envelopes and/or control numbers:

1. From the **Deployment** menu, select **Resource Manager** > **Import/Export**.

2. On the Import/Export page, next to **Import Resources**, click **Go!**

3. Type the name of the file containing the envelopes or control numbers to import, or use **Browse** to locate and select it by clicking **Open**, and click **Next**. If the import file contains errors, you can either select the file and click **Next** again to continue the import, or click **Cancel** to stop the import process.

4. If the exported file used a resource tag, type a name and description for the new resource tag and click **Next**.

5. Indicate whether you want to update objects that may already exist in Gentran Integration Suite with objects from the import (the default is Yes), and click **Next**.

6. On the TP Envelopes screen, indicate whether you want to **Keep existing control numbers** (the default is No, which specifies that the control numbers in the import file will be imported).

7. From the lists, select resources to import for each resource type, move the resources to the **To be imported list**, and click **Save** when you have selected all the necessary resources. If you select more than one resource type to import, you must repeat this step for each resource type.

    Note: Some resources may require you to type the passphrase (created during export) before completing the import.

8. If you are importing a file or files that contains control numbers, the TP Control Numbers screen is displayed. Select the appropriate options and click **Next**.

    Note: The option that you selected for **Keep existing control numbers** on the TP Envelopes screen will be used for the control numbers as well.

9. To update Gentran Integration Suite with the imported file or files, click **Finish**.

    Note: This process may take several minutes, depending on the number and size of the libraries being imported.

10. When the message, *The system update completed successfully* displays, click **View Import Report** to see the import report.

11. If errors occurred during import, next to **Data which failed to Import**, click **Download** to view the XML file containing the names of the objects that did not import.

    Note: This option displays only when the import completed with errors.

12. To create a backup of the data as it existed prior to import, next to **Data in SI before Import**, click **Download**.

13. In the **Save As** dialog box, change the default filename, backup.xml, to a unique, meaningful name for this backup, and then click **Save**.

14. Click **Return** to continue.

Importing Trading Partner Data Through the Basic Import Utility

To import a file containing document envelopes or control numbers (or both) from the command line:

1. Change to the *install_dir*/**tp_import** directory.

2. Run one of the following commands:

    ◆ `./import.sh -input [input filename]` (UNIX)

    ◆ `import.cmd -input [input filename]` (Windows)

Note: *Input filename* is the name of the XML file you want to import. This is a mandatory parameter used with the Import utility.

    ◆ `./import.sh -batch [input filename]` (UNIX)

    ◆ `import.cmd -batch [input filename]` (Windows)

Note: *Input filename,* when you are running a batch import, indicates that each line in file name is a separate import (XML file) to run. This is a mandatory parameter used with the Import utility.

All the available parameters are listed in the following table:

Option	Description
-input *[input filename]*	Specifies the name of the XML file to import. Mandatory.
	Example: `import.sh -input testEnvelope`
	This parameter is mutually exclusive from the -batch parameter (use either the -input parameter or the -batch parameter). An error will be generated if the input file name is not provided.
-batch*[input filename]*	Specifies the name of the file to import. Mandatory.
	Example: `import.sh -batch testEnvelope`
	This parameter is mutually exclusive from the -input parameter (use either the -input parameter or the -batch parameter). An error will be generated if the input file name is not provided.
-update	Indicates the system will update the existing trading partner profiles. Optional; if not present, the existing records remain unchanged.
-backup *[filename]*	Name of the file in which the backup of the updated records is stored. Optional; if not present, the backup records are not saved.
-errors *[filename]*	Name of the file in which records that Gentran Integration Suite failed to process are stored. Optional; if not present, the errors records are not saved.
-passphrase *[passphrase]*	Password used to import entities into Gentran Integration Suite. Optional. **Note:** This is the passphrase that was used during export.

Option	Description
–pre32passphrase *[passphrase]*	Password used to import some encrypted resources into Gentran Integration Suite, if the file was exported from Gentran Integration Suite prior to version 3.2. Optional. **Note:** This is the system passphrase of the Gentran Integration Suite version prior to version 3.2 from which the file was exported. Example: `import.sh -input [`*`input filename`*`]` `-pre32passphrase [`*`system passphrase from system where`* *`exported`*`] -passphrase [`*`passphrase entered by user`* *`during export`*`]`
-privatecerts	Indicates that private key certificates will be imported if any are found. Optional.
-report *[filename]*	Specifies the path to the report file. The default is **import.rpt** or **batchimport.rpt**. Optional.
-resourcetag *[resource tag]*	Specifies the resource tag for the imported resources. Specify **USETAGININPUTFILE** to apply the resource tag contained in the input file. Optional.
-KeepExistingControlNumbers	Indicates whether you want to keep existing control numbers. If you use this parameter, it specifies that for existing envelopes and control numbers, control number values in the import file will not be imported. If a version of an envelope or control number being imported already exists in the system, the import process will overwrite the value specified in import file with the existing control number value for that envelope or control number. If you do not specify this parameter, the control numbers in the import file will be imported.
-x	Specifies not to return an exit code. Optional. By default, the utility returns an exit code.
-h | -?	Displays the help screen.

Importing Trading Partner Data as a CSV File

Before you import, if you need to import partner information that will cause overwrites, perform the following steps:

1. Export the CSV file.

2. Run **basicimport.sh** or **basicimport.cmd** without the *-import* parameter to create the XML file.

3. Import the XML file into Gentran Integration Suite through the Resource Manager, which will present you with the option to specify whether objects that already exist in Gentran Integration Suite should be overwritten.

To import a CSV file from the command line:

1. Change to the *install_dir*/**tp_import** directory.

2. Run one of the following commands:

    ◆ `./basicimport.sh -import [</path and input CSV filename>]` (UNIX)

    ◆ `basicimport.cmd -import [</path and input CSV filename>]` (Windows)

Note: When you run the Basic Import Utility with the -import parameter, the utility updates any existing files (if, for example, you previously imported the a CSV file with the same name as the one you are currently converting and importing). If you do not use the -import parameter, the utility will convert the CSV file to XML and you can import the XML file to Gentran Integration Suite using the Resource Manager Import interface. Using the Resource Manager enables you to specify not to update existing items. See *Importing Resources* for more information on using the Resource Manager.

The available parameter is listed in the following table:

Option	Description
-import *[</path and input CSV filename>]*	Specifies the name of the CSV file to import. Mandatory.
	Example: `basicimport.sh -import c:\import\CSVtest`
	If you do not use the -import parameter, the utility will convert the CSV file to XML and you can import the XML file to Gentran Integration Suite using the Resource Manager Import interface.

Exporting Trading Partner Data Using the Command Line

To export a file from the command line:

1. Change to the *install_dir*/**tp_import** directory.

2. Run one of the following commands:

    ◆ `./export.sh -input [input filename]` (UNIX)

    ◆ `export.cmd -input [input filename]` (Windows)

Note: *Input filename* is the name of the XML file you want to export. This is a mandatory parameter.

All the available parameters are listed in the following table:

Option	Description
-input *[filename]*	Name of the file that contains the objects to be exported. Mandatory. The properties file describing which resources to be exported should have the following format.
	RESOURCE_TYPE[1]=ALL
	Or
	RESOURCE_TYPE[1]=ResourceNameA RESOURCE_TYPE[2]=ResourceNameB RESOURCE_TYPE[3]=ResourceNameC Etc.
	The RESOURCE_TYPE is the name of the resource as defined by tp_import_export.properties. If a resource has a subtype, then the specific sub-type name must be used. The following is an example properties file to export all EDI envelopes and maps from the system.
	DOCUMENT_ENVELOPES[1]=ALL MAPS[1]=ALL
-tag *[tagname]*	Resource tag name to associate with the export file. This will be the default tag created when importing. Optional
-output *[filename]*	Name of the file that contains the exported data (use .xml as the file extension). Optional.
-report *[filename]*	Name of the file that contains a report if there were in errors during the export. Optional.
-doCerts *[filename]*	Name of the file used to export transport and certificates. Optional.
-passphrase *[passphrase]*	Password used to export transport and certificates. Optional. **Note:** This is the passphrase that was used during export.
-allversions	Used to export all versions from the system. Optional.

Configuring Your Organization Information using AS2

To configure your organization information using AS2:

1. From the **Administration** menu, select **Trading Partner** > **AS2**.

2. On the AS2 Trading Partners page, next to Create New AS2 partner or organization, click **Go!**

3. On the AS2 Configuration Type page, select **Organization**, and click **Next**.

4. On the Organization Details page, complete the following fields and click **Next**:

Organization Fields	Description
Name	Name of your organization. Must not contain spaces. Required.
Identifier	Primary ID of your organization. It could be a DUNS number, EDI interchange ID, e-mail address, or another unique string. Required.
Exchange Certificate	Name of certificate that your organization is using for decryption. Required.
Signing Certificate	Name of the certificate that your organization is using to sign messages. This certificate can be the same as the certificate that you are using for key exchange. Required.

5. Click **Finish** to add the organization record.

6. Click **Return** to continue.

Configuring Your Trading Partner Information using AS2

To configure your trading partners using AS2:

Note: When configuring an AS2 community, you must configure your organization before you can configure your trading partners.

1. From the **Administration** menu, select **Trading Partner > AS2**.

2. On the AS2 Trading Partners page, next to Create New AS2 partner or organization, click **Go!**

3. On the AS2 Configuration Type page, select **Partner** and click **Next**.

4. On the Identifications page, complete the following fields and click **Next**:

Identification Fields	Description
Name	Name of your trading partner. Must not contain spaces. Required.
Identifier	Primary ID of your trading partner. Used to identify the trading partner for message protocols like AS2. Required. Valid values are: ◆ DUNS number ◆ EDI interchange ID ◆ e-mail address ◆ other unique string
Store AS2 Messages in File System	Whether to use the File System adapter to collect and extract messages and save them disk. Optional.
Store AS2 Messages in Mailbox	Whether to use a mailbox to store messages. Optional.

5. On the HTTP Communication page, complete the following fields and click **Next**:

HTTP Fields	Description
End Point	HTTP address of the transport. It can be a URL. For AS2, the end point must be the complete URL to send messages. Required.
User ID	Identifier for HTTP basic authentication if required to log in to the trading partner system. Optional.
Password	Password for HTTP basic authentication if required to log in to the trading partner system. Optional.
Response Timeout (sec)	Number of seconds to wait for a response from the remote server. Valid value is number of seconds. Optional. **Note:** To avoid timing out, set both the Response Timeout and Socket Timeout fields to the same value and verify that the value is greater than 180 seconds.

HTTP Fields	Description
Firewall Proxy	IP address, port number, login ID, and password of your proxy server if you use a proxy server to connect outbound to this trading partner. Separate values with a comma. If used, you must specify both the login ID and password. Optional.
Firewall Connect Count	Number of attempts that Gentran Integration Suite makes to connect to the proxy server before timing out. Optional.
Socket Timeout (sec)	Number of seconds that the socket connection can idle before timing out. Valid value is any positive number that is optimal for your system. Optional. **Note:** To avoid timing out, set both the Response Timeout and Socket Timeout fields to the same value and verify that the value is greater than 180 seconds.
SSL	Whether Secure Sockets Layer (SSL) must be active. Required. Valid values are: ◆ None – SSL is not used by the transport. ◆ Optional – SSL encryption. ◆ Must – Transport uses this protocol configured for SSL encryption. If you select **Optional** or **Must**, the asset protection key must allow SSL for the appropriate protocol.
Key Certificate Passphrase	Type a passphrase to be used with this key certificate. Required if SSL is Optional or Must.

Cipher Strength	Strength of the algorithms used to encrypt data. Only accepts supported algorithm. Required. Valid values are:
	◆ ALL – Includes all cipher strengths (weak and strong as listed below).
	◆ WEAK – Required for international e-commerce if government regulations prohibit STRONG encryption from being exported. Includes the following strengths:
	    ◆ Export level RSA 512-bit with 40-bit RC4 and MD5
	    ◆ Export level RSA 512-bit with 40-bit DES and SHA1
	◆ STRONG – Required if SSL option is anything other than None. Includes the following strengths:
	    ◆ RSA with 128-bit RC4 with SHA1
	    ◆ RSA with 128-bit AES with SHA1
	    ◆ RSA with 256-bit AES with SHA1
	    ◆ RSA with 3DES with SHA1
	    ◆ RSA with 128-bit RC4 with MD5
	    ◆ RSA with DES with SHA1
	
	Note: If you are using an older or retired adapter, the 128-bit and 256-bit AES ciphers might not be available. For more information on the phases of the Retiring process, see *Retiring and Removed Services and Adapters*.

HTTP Fields	Description
Key Certificate (System Store)	Select a key certificate. Optional. Valid values are: ◆ B2BHttp ◆ UIKey ◆ OpsDrv ◆ OpsKey
CA Certificates	Certificate used to validate SSL server authentication of the trading partner. Required if you selected **Must** or **Optional** in the SSL field.

6. On the Messages page, complete the following fields and click **Next**:

Messages Fields	Description
Payload Type	Payload is the document at the inner level of the message. The payload type describes the message format for transporting documents. Optional. Valid values are: ◆ Plain Text – Payload is not signed and it is not encrypted. ◆ Signed Detached – Payload is signed with a detached signature, according to the EDIINT specifications. ◆ Encrypted – Payload is encrypted according to the EDIINT specifications. ◆ Signed Detached Encrypted – Payload is signed with a detached signature and then encrypted, according to the EDIINT specifications.
MIME Type	How to package the lowest level of payload content (the document at the inner level of a message) to be sent. Helps to implement the EDIINT specification correctly, and provides some flexibility, because receiving programs might expect a specified MIME type and sub-type. Optional. Valid values are: ◆ Text – For XML or text ◆ Application – For EDI, or any other type of data ◆ Message ◆ Image ◆ Video ◆ Audio

Messages Fields	Description
MIME Sub Type	How to package the lowest level of payload content (the document at the inner level of a message) to be sent. Optional. Valid values are: ◆ EDI-X12 ◆ EDIFACT ◆ EDI-Consent ◆ Octet-stream – For any type of data ◆ XML ◆ Plain
Compress Data	Whether to compress the payload. Optional. Valid values are: ◆ None ◆ Low ◆ Medium ◆ High ◆ Default
Exchange Certificate	Name of the trading partner encryption certificate. Optional.
Signing Certificate	Name of the trading partner self-signed certificate that encompasses the secured private key and associated certificate in encrypted format. This certificate can be the same as the certificate that you are using for the self-signed CA certificate. Required.
Encryption Algorithm	If you selected a payload type requiring encryption, identifies the encryption algorithm to use. Required. Supported algorithms are: ◆ Triple DES 168 CBC with PKCS5 padding ◆ 56-bit DES CBC with PKCS5 padding ◆ 128-bit RC2 CBC with PKCS5 padding ◆ 40-bit RC2 CBC with PKCS5 padding
Signing Algorithm	Used only by the EDIINT Message service to transfer data to the trading partner. Identifies the fixed-length of compressed representation of signed messages. Required. Valid values are: ◆ MD5 – Message digest algorithm that verifies the integrity of data through a 128-bit message digest. ◆ SHA1 – Secure hash algorithm that verifies the integrity of data through a 160-bit (20 byte) message digest.
MDN Receipt	Whether you expect a Message Disposition Notification (MDN) from your trading partner. Optional.

7. Complete one of the following steps:

 ◆ If you did not select MDN Receipt, go to step 8.

 ◆ If you selected MDN Receipt, in the Receipt page, complete the following fields and click **Next**:

Receipt Fields	Description
Receipt Signature Type	Used only by the EDIINT Message service to transfer data to the trading partner. Identifies the fixed-length of compressed representation of messages requested on receipts. Valid values are: ◆ None ◆ MD5 – Message digest algorithm that verifies the integrity of data through a 128-bit message digest. ◆ SHA1 – Secure hash algorithm that verifies the integrity of data through a 160-bit (20 byte) message digest. Transmission is a bit slower that MD5; however, the larger message digest size offers a more secure data transference. **Note:** Selection of a value other than **None** prompts the EDIINT Message service to request a signed Message Disposition Notification (MDN) when building messages to the trading partner.
Receipt Timeout	Timeout value for receipt of expected MDNs, in seconds. Optional.
Retry Interval (sec)	Number of seconds Gentran Integration Suite waits before trying again to contact the trading partner after the previous attempt timed out. Zero (0) is invalid. Required.
Delivery Mode	Used only by the EDIINT Message service to deliver receipts for messages received. Required. Valid values are: ◆ Asynchronous HTTP – Used for AS2 and RosettaNet if you want an asynchronous receipt. ◆ Asynchronous HTTPS – Used for AS2 if you want an asynchronous receipt. ◆ Asynchronous SMTP – Used for AS1 and AS2 if you want an asynchronous receipt. ◆ Synchronous – Used for AS2 if you want a synchronous receipt.
Receipt to Address	Where a receipt must be sent if it is not going to the e-mail address specified. Optional. **Note:** If you are using EDIINT AS2 requesting asynchronous MDNs, you must type the complete URL where you want the message to be sent.
Setup additional Server Communication	If selected, the system displays the Communication page next so that you can enter additional server information. Optional.

8. Complete one of the following steps:

 ◆ If you did not select **Setup additional Server Communications** on the Receipt page, go to step 9.

 ◆ If you did selected **Setup additional Server Communications** on the Receipt page, compete the fields on the Additional HTTP Communication page using the table in step 5, then continue with step 9.

9. Complete one of the following steps:

    ◆ If you did not select **Store AS2 Messages in Mailbox** on the Identification page, go to step 10.

    ◆ If you selected **Store AS2 Messages in Mailbox** on the Identification page, complete the following fields and click **Next.Go to step 11**

.

Identification Fields	Description
Use Default Inbound/Outbound Mailboxes	If selected, the default inbound and outbound mailbox names are used. Optional.
Select Existing Parent Mailbox	When a parent mailbox name is selected, the inbound and outbound mailbox names are created from the selected name. Optional.

10. On the Collection page, complete the following fields and click **Next**:

Collection Fields	Description
Collection folder	Directory that contains outgoing (outbound) documents to your trading partners. Required. The default directory is *install_dir*/webapp/as2partner/outbound.
Extraction folder	Directory that contains incoming (inbound) documents from your trading partner. Required. The default directory is *install_dir*/webapp/as2partner/inbound.
Error log folder	Directory to which errors are written for outgoing (outbound) documents that contain errors (for example, if Gentran Integration Suite cannot send a document because of an invalid IP address, an error log is generated and saved in this folder). Required. **Note:** The default directory is *install_dir*/error.
Run service based on timer every	Hours and minutes in which to run the File System service. The default time is five minutes. Required.
Include File Name In Message	Name of files that contain documents. Required. Valid values are: ◆ None – Do not include names of files. ◆ File Name Only – Includes only the name of files. ◆ Full Path – Includes the name of the files and the directory path where the files are saved.

11. Click **Finish** and update your trading partner information. You do not need to create a contract.

12. Click **Return** to continue.

Updating AS2 Trading Partner Organization Records

To update AS2 organization information:

1. From the **Administration** menu, select **Trading Partner > AS2.**
2. On the Trading Partner Configurations page, next to List all configurations, click **Go!**
3. In the list, locate **profile_ORGANIZATION** and click **Edit**.
4. Update your organization information and click **Next**.
5. Click **Finish** to save your changes.
6. Click **Return** to continue.

Updating AS2 Trading Partner Records

To update AS2 trading partner information:

1. From the **Administration** menu, select **Trading partner > AS2**.
2. On the Trading Partners page, next to List all configurations, click **Go!**
3. In the list, locate name of the trading partner whose information you want to change and click **Edit**.
4. Update the trading partner information and click **Next**.
5. Click **Finish** to save your changes.
6. Click **Return** to continue.

Generating a Trading Partner Report

To generate the Trading Partner report:

1. From the **Community Management** menu, select **Reports > Trading Partner Report**.

2. Select the communities to be included in the report.

3. Click **Go!** The report is generated and displayed in a new browser window. The report contains:

   ◆ Community name

   ◆ Information for every trading partner in each community including name, address, phone number, e-mail address, and EDIID

4. To close the browser window that displays the report, click the X in the upper right hand corner.

5. To generate another report with different search criteria, repeat steps 1-3.

Generating a Document Tracking Report

To generate a document tracking report:

1. From the **Community Management** menu, select **Tools > Document Tracking**.

2. Type or select all or none of the following search criteria:

   ◆ Community (only valid community names are available)

   ◆ Trading Partner Name (only valid trading partner names are available)

   ◆ Direction (inbound, outbound, or forward)

   ◆ Document Type

   ◆ Document/Tracking Id

   ◆ Date Range (date format is 09/01/2004; time format is 3:01)

3. Click **Go!** A separate results page opens.

4. To close the browser window that displays the report, click the X in the upper right hand corner.

Generating a Document Activity Report

To generate the Document Activity report:

1. From the **Community Management** menu, select **Reports > Document Activity Report**.

2. Select range of dates for documents processed.

3. Select the communities to search for documents.

4. Click **Go!** The report is generated and displayed in a new browser window. The report contains:

   ◆ Community name

   ◆ Name of each trading partner within the community

   ◆ Number of documents for each trading partner

   ◆ Percentage of total community documents that the number of documents listed for each trading partner comprises for the community

5. To close the browser window that displays the report, click the X in the upper right hand corner.

6. To generate another report with different search criteria, repeat steps 1-4.

Generating a Community Registration Report

To generate the Community Registration report:

1. From the **Community Management** menu, select **Reports > New Registration Report**.

2. Select a date range for registrations for this report.

3. Select the communities you want to search in for new registrations.

4. Click **Go!** The report data is generated and displayed in a new browser window. The report contains:

   ◆ Trading partner name

   ◆ Registration date and time

   ◆ Phone number

   ◆ E-mail address

5. To close the browser window that displays the report, click the X in the upper right hand corner.

6. To generate another report with different search criteria, repeat steps 1-4.

Import Service GPM or the Workflow Context

The Import service exercises the same functionality as the Import Resources option in the Resource Manager. When using the Import service, all available resources are imported, and all imported versions are set as the defaults, where applicable.

There is a new parameter when you configure the Import service through the GPM, **Keep existing control numbers**. The default for this parameter is **No**, which specifies that the control numbers in the import file will be imported.

If you change the **Keep existing control numbers** parameter to **Yes**, then it specifies that for existing envelopes and control numbers, control number values in the import file will not be imported. If a version of an envelope or control number being imported already exists in the system, the import process will overwrite the value specified in the import file with the existing control number value for that envelope or control number.

Note: You can specify whether to keep existing control numbers in through the GPM or BPML, but you cannot alter this parameter through the Gentran Integration Suite user interface.

As an alternative to changing the value for the Import Service **Keep existing control numbers** parameter to **Yes**, you can add the following to the raw BPML workflow context (the workflow context (WFC) represents the business process state after each service has run):

```
<process name="ImportServiceWithKeepExistingControlNumbers">
   <sequence>
      <operation>
         <participant name="ImportService"/>
         <output message="Xout">
            <assign to="KeepExistingControlNumbers">True</assign>
            <assign to="." from="*"></assign>
         </output>
         <input message="Xin">
            <assign to="." from="*"></assign>
         </input>
      </operation>
   </sequence>
</process>
```

Importing Trading Partner using Basic Import Utility Process

The Basic Import Utility uses the following process flow:

1. You drop a CSV file in the *install_dir*/**tp_import/basic_customer_import_collect** directory.

2. The BasicCustomerImport_FSA file system adapter scans this directory and picks up the CSV file on a scheduled basis.

3. The BasicCustomerImport_FSA file system adapter initiates the predefined business process (BasicCustomerImport.bp).

4. The Basic Customer Import business process runs the import translation map (BasicCustomerImport.txo) and initiates the Import service.

5. The Import service imports the converted XML file into Gentran Integration Suite.

Note: If exceptions occur when running the Basic Import Utility, Gentran Integration Suite includes this information in the basic import report (BasicImportReport.rpt, in XML format), located in the *install_dir*/**tp_import** directory, which is generated after the Basic Import utility is run.

CSV File Layout

Your CSV file must conform to the file layout for the BasicCustomerImport map.

Note: Or, using the Map Editor, you can modify the BasicCustomerImport map as necessary so it conforms to your file layout (add map components, delete map components, and so forth). You will then need to compile the map (save it using the same name or modify the name of the translation map that is called by the Basic Customer Import business process) and check it in to Gentran Integration Suite.

The file layout is as follows:

```
Tag,Company_Name,Reference_URL,DUNS_Number,Address_1,Address_2,City,State,Zip_Code,
TimeZone,Country,Email_address,Phone_number
```

Note: The appropriate values for the above fields are the same as when you type information in these fields using the Gentran Integration Suite Trading Partner interface.

An example of data in this format is as follows:

```
A,RomansFloorsAndMore,www.romansfloors.com,01234567899,13 Measle Lane,2nd
Floor,Powell,OH,43065,-05,US,roman@romansfloors.com,614-555-1212
```

The following table defines which fields are mandatory and which are optional:

Field	Usage
Tag	Mandatory
	Note: This parameter must be "A," unless you check the BasicCustomerImport.map map out, modify the tag, recompile the map, and check it back in to Gentran Integration Suite.
Company_Name	Mandatory
Reference_URL	Mandatory
DUNS_Number	Mandatory
Address_1	Mandatory
Address_2	Optional
City	Mandatory
State	Optional
Zip_Code	Mandatory
TimeZone	Mandatory
Country	Mandatory
Email_Address	Optional
Phone	Optional

Exit Codes

These import utilities returns the following exit codes:

Exit Code	Description
0	The import completed with success status.
1	The import completed with error status.
99	The Import utility reached timeout while waiting for status.

Index

R

receipt signature type 125

receipt timeout 125

receipt to address 125

record
  contract 24
  delivery channel 12
  document exchange 11, 49, 56
  packaging 12, 61
  profile 12
  transport 11

response time 121

retry interval 125

S

setting up collection folder 126

setting up error log folder 126

setting up extraction folder 126

signing algorithm 124

signing certificate 124

SMTP settings, transport record 54

socket timeout 122

SSL 122

standard imports 13

T

trading partner
  adding manually 69
  basic import utility process 134
  CA certificate 123
  configuring 121
  configuring using AS2 121
  create basic profile 40, 42, 44, 46
  overview 7
  setting up collection folder 126
  setting up error log folder 126
  setting up extraction folder 126
  synchronize information 76

trading partner configuration
  cipher strength 122
  collection folder 126

compress data 124
encryption algorithm 124
end point 121
error log folder 126
exchange certificate 124
extraction folder 126
firewall connect count 122
firewall proxy 122
HTTP communication 121
identifier 121
message delivery mode 125
message disposition notification (MDN) 124, 125
messages 123
MIME sub type 124
MIME type 123
name 121, 123
password 121
receipt signature type 125
receipt timeout 125
receipt to address 125
response time 121
retry interval 125
signing algorithm 124
signing certificate 124
socket timeout 122
SSL 122
user ID 121

trading partner data
  import utility 116, 119

trading partner organization
  update AS2 127

trading partner profile
  creating 63

trading partner profiles
  get updates 77

trading partner record
  deleting 67
  disable 66
  update 65

trading partner records
  update AS2 127

trading partner report
  generate 129
  generating 129

trading profile
  advanced setup 11

U

Gentran Integration Suite Trading Partner and Community Guide