Sterling B2B Integrator

Navigation

Version 5.2.3

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Note

Before using this information and the product it supports, read the information in "Notices" on page 33.

Contents

Navigation (5.2.3 or higher)

A good understanding of Sterling B2B Integrator navigation will enhance your experience with the product.

User Interface

The IBM® Sterling B2B Integrator user interface (UI) is designed to simplify the navigation between the functional areas of the system. Throughout the user interface, navigation aids such as the **Back** and **Next** buttons, menu organization, and task flow are consistent, enabling you to confidently and quickly complete your activities.

The IBM Sterling B2B Integrator UI enables you to create, configure, and manage your operations by steering you toward the activities that you must undertake.

The system provides access to files, business processes, Web templates, services, and product features according to permissions assigned to your user account by the system administrator. Thus, the activities that you can perform and the sections of the UI you have access to depend on the permissions assigned. In general, however, the UI enables the creation and management of:

- User accounts and permissions
- Trading partner profiles
- B2B packaging and communications definitions
- Translation maps (using the Map Editor)
- Process definitions (business process models)
- Reports
- Trading partners
- Online forms (Web templates).

In addition, the UI enables you to:

- Configure services and adapters
- Monitor and configure system operations
- Manually start and stop processes
- Customize display.

Configure Browser Settings

Some browsers and/or operating systems require additional configuration in order to correctly render the Sterling B2B Integrator user interface in certain languages. Use the procedures provided in this section to properly configure a browser to display the Sterling B2B Integrator user interface in the appropriate language.

Note: If your browser is unable to display the user interface properly or you see a mixture of English and another language, this is an indication that the browser is configured incorrectly. You may also need to install additional fonts on the Sterling B2B Integrator server.

Support for Foreign Languages

Note: Sterling B2B Integrator 5.2.3 product code is designed to work with Latin based English only input. The use of any other type of input may have uncertain results and is not supported as part of the 5.2.3 release.

The Sterling B2B Integrator 5.2.3 user interface supports several new foreign languages:

- French
- German
- Italian
- Japanese
- Korean
- Polish
- Portuguese (Brazilian)
- Simplified Chinese
- Traditional Chinese

Four of these languages involve expanded Unicode character sets:

- Japanese
- Korean
- Simplified Chinese
- Traditional Chinese

The implementation of these languages in your environment may require the addition of new Unicode fonts on your server:

If...	then...
Sterling B2B Integrator is on a server that already supports these languages,	you do not need to install any additional fonts.
you are installing on a server that is only setup for the Latin alphabet and you have users who need to view the Sterling B2B Integrator user interface in any of the Asian languages,	you need to have the fonts for these languages installed.

A way to test this is to create a user with one of the new languages and setup their browser to use that language as it's primary language. Log in to the system and review the user interface. If you see a mixture of English and the new language, your configuration is not correct. You will need to verify the browser is setup correctly and review the fonts installed on the server.

The installation of additional fonts/languages on the server should be done in coordination with your technical support team. Be sure to include a Unicode Sans Serif font on your server.

Note: While multiple foreign languages are supported, a user account should be configured to use one specific language to avoid user interface display issues.

Add a Custom Language Preference Code

About this task

In order for your browser to display the Sterling B2B Integrator user interface and address bar text correctly in a foreign language, you must specify the appropriate language preference code for the browser.

Sterling B2B Integrator 5.2.3 supports the following language preference codes:

- de
- en
- en-US
- es
- fr
- it
- ja
- ko
- pt-BR
- zh
- zh-TW

Your browser must be configured to use one of these specific language preference codes to view the Sterling B2B Integrator user interface.

Note: Most browsers provide a default listing of language preference codes. However, Sterling B2B Integrator requires the use of the specific codes as listed here. For example, you cannot use the default German (Germany) [de-DE], you must use **[de]**.

You may need to add these supported codes as a custom language preference code in your browser.

Note: The instructions for configuring a browser's display will differ for each browser. Refer to your chosen browser's documentation for specific instructions on configuring that browser's display.

The following is an example of how to configure a client machine display for an IE window.

Procedure

1. Open an IE browser window.
2. Select **Tools > Internet Options**.
3. At the bottom of the window under Appearance, click **Languages**.
4. Click **Add** to display the Add Language window.
5. In the User defined: text box, enter the appropriate language preference code from the list below:
   - de
   - en
   - en-US
   - es
   - fr

- it
- ja
- ko
- pt-BR
- zh
- zh-TW
6. Click **OK**. The added code should display in the Language: listing in the Language Preference window. An example entry would be, **User Defined [de]**.
7. (Optional) Move the added language up to be the first one listed if there are multiple languages listed.
   a. Select the newly added language.
   b. Click **Move up**.

      The newly added language should now appear first in the Language listing.
8. Click **OK** to save your Language Preference settings.
9. Click **OK** to close the Internet Options window.
10. Close your browser window.
11. Open a new browser window and access the Sterling B2B Integrator user interface to verify your changes have been applied.

Change Default Browser Font

About this task

Some languages require the use of special fonts to properly display the Sterling B2B Integrator user interface. The client computer must be configured to display these types of fonts. Each Windows client must be configured appropriately.

Note: The instructions for configuring a browser's display will differ for each browser. Refer to your chosen browser's documentation for specific instructions on configuring that browser's display.

The following is an example of how to change the default browser font for an Internet Explorer (IE) window.

To configure a client machines display for IE:

Procedure

1. Determine which fonts are needed to support your needed language and verify they are installed on the server.

   Note: The installation of additional fonts/languages on the server should be done in coordination with your technical support team. Be sure to include a Unicode Sans Serif font on your server.
2. Open an IE browser window.
3. Select **Tools > Internet Options**.
4. At the bottom of the window under Appearance, click **Fonts**.
5. From the Language Script drop-down menu, change the Latin based value to the appropriate script for your needed language.

Note: If your encoding is not available, you may need to install a new version of Internet Explorer, but make sure you install the appropriate international options.

6. Select a Webpage font and a Plain text font appropriate for the new language. A Plain text font is one in which all the characters take up the same amount of space and is associated with older computer terminals.

   Note: If no fonts are listed in the menus, then you need to install fonts designed for that encoding.
7. Click **OK** to close the Fonts window.
8. Click **OK** again to close the Internet Options window.
9. Close your browser window.
10. Open a new browser window and access the Sterling B2B Integrator user interface to verify your changes have been applied.

Set the Client Character Display

About this task

To use special characters, such as for various languages, the client computer must be configured to display these types of characters. In order for Unicode characters to display correctly in the application, each Windows client must be configured appropriately.

Note: The instructions for configuring a browser's display will differ for each browser. Refer to your chosen browser's documentation for specific instructions on configuring that browser's display.

The following is an example of how to configure a client machine display for an Internet Explorer (IE) window.

To configure a client machines display for IE:

Procedure

1. Open an IE browser window.
2. Select **View > Encoding > Auto-Select**.

Clearing Browser and Java Plugin Caches Before Initial Deployment

About this task

Once the Sterling B2B Integrator is ready for deployment, each user must clear the browser and Java Plugin caches on their client machines before launching Sterling B2B Integrator. This requirement applies to all browsers.

To clear the browser and java caches, do the following:

Procedure

1. From the browser menu bar, select **Settings > Control Panel > Internet Options**.
2. Select the General tab, and in the Temporary Internet Files panel, click **Delete Files**. The Delete Files dialog displays.

3. Check the **Delete All Offline Content** checkbox. Click **OK** until the Internet Properties window closes. The browser cache is cleared.
4. From the Windows start menu, select **Settings > Control Panel > Java**.
5. Select the General tab, and in the Temporary Internet Files panel, click **Settings**. The Temporary Files Settings dialog displays.
6. In the Disk Space panel, click **Delete Files**. The Delete Temporary Files pop-up window displays.
7. Click **OK** until the Java Control Panel window closes.

General Internet Explorer Browser Settings

When using Sterling B2B Integrator without any customizations, you need to set the General Browser settings for your Internet Explorer in order to obtain the best browser performance.

Note: This can impact the display of reports and search listings.

To set your general browser settings:

1. From the Internet Explorer menu, select **Tools > Internet Options**.

   The Internet Options window opens to the General tab.
2. Locate the Browsing history section and click **Settings**.

   The Temporary Internet Files and History Settings window opens.
3. Below Check for newer versions of stored pages: select the **Everytime I visit the webpage** option.
4. Click **OK** to save your changes.
5. Click **OK** to apply the changes.
6. Close the browser window and re-open it.

   The browser is now set to check for updates to pages everytime a page is accessed rather than relying upon a cached version.

Internet Explorer Security Settings

About this task

When using Sterling B2B Integrator without any customization, you need to set security settings for your Internet Explorer to obtain the best browser performance.

To configure the Internet Explorer security and privacy settings:

Procedure

1. From the Internet Explorer menu, select **Tools > Internet Options**.
2. Click the **Security** tab.
3. Select the Web content zone from which Sterling B2B Integrator is accessed.
4. Set the security level to **Medium-low**.
5. Click **Custom Level** and set your security settings according to the following table:

Internet Explorer Security Setting	Sterling B2B Integrator
.NET Framework	
Loose XAML	Enable
XAML browser applications	Enable

Internet Explorer Security Setting	Sterling B2B Integrator
XPS documents	Enable
.NET Framework-reliant Components	
Permissions for components with manifests	High Safety
Run components not signed with Authenticode	Enable
Run components signed with Authenticode	Enable
ActiveX Controls and Plugins	
Allow previously unused ActiveX controls to run without prompt	Enable
Allow Scriptlets	Enable
Automatic prompting for ActiveX controls	Enable
Binary and script behaviors	Enabled
Display video and animation on a webpage that does not use external media player	Disable
Download signed ActiveX controls	Prompt
Download unsigned ActiveX controls	Prompt
Initialize and script ActiveX controls not marked as safe for scripting	Prompt
Run ActiveX controls and plugins	Prompt/Enable
Script ActiveX controls marked as safe for scripting	Enable
Downloads	
Automatic prompting for file downloads	Enable
File download	Enable
Font download	Prompt
Enable .NET Framework setup	Enable
Java VM	
Java permissions	Medium safety
Miscellaneous	
Access data sources across domains	Enable
Allow META REFRESH	Enable
Allow scripting of Internet Explorer web browser control	Enable
Allow script-initiated windows without size or position constraints	Enable
Allow webpages to use restricted protocols for active contents	Prompt
Allow websites to open windows without address or status bars	Enable
Display mixed content	Prompt
Do not prompt for client certificate selection when no certificates or only one certificate exists	Enable
Drag and drop or copy and paste files	Prompt
Include local directory path when uploading files to a server	Enable

Internet Explorer Security Setting	Sterling B2B Integrator
Installation of desktop items	Prompt
Launching applications and unsafe files	Prompt
Launching programs and files in an IFRAME	Prompt
Navigate sub-frames across different domains	Enable
Open files based on content, not file extension	Enable
Software channel permissions	Medium safety
Submit non-encrypted form data	Prompt
Use Phishing Filter	Disable
Use Pop-up Blocker	Disable
Userdata persistence	Enable
Websites in less privilged web content zone can navigate into this zone	Prompt
Scripting	
Active scripting	Enable
Allow Programmatic clipboard access	Prompt
Allow status bar updates via script	Enable
Allow websites to prompt for information using scripted windows	Enable
Scripting of Java applets	Enable
User Authentication	
Logon	Prompt for user name and password

6. Click **OK** to save your settings.
7. Click **OK** to save the new settings and **Apply** to implement the settings. The new settings are applied when a new browser window is opened.

Accessing the User Interface

Before you can access the IBM Sterling B2B Integrator UI, the system must be installed and you must log in.

After IBM Sterling B2B Integrator is installed, your system administrator creates your user account and assigns user permissions related to using the various system components. Before accessing IBM Sterling B2B Integrator for the first time, contact your system administrator to obtain:

- IBM Sterling B2B Integrator UI URL for the log in page
- Your User ID
- Your Password

Log In and Out

About this task

To log in to IBM Sterling B2B Integrator:

Procedure

1. Navigate to theIBM Sterling B2B Integrator Login page.
2. Enter your **User ID**.
3. Enter your **Password**.
4. Click **Sign In**. If the Login page is displayed again, this indicates that your system administrator requires you to create a new password the first time you log in, for security reasons. Enter a new password in the corresponding fields, and click **Sign In** again. The Admin Console pane is displayed.

   Note: If your User ID or password or both do not work, contact your system administrator.

What to do next

To log out click **Logout** in the top right-hand corner of the page. This ends your session and displays the Login Page.

Note: Close additional windows, for example, SQL Manager, before you click **Logout**.

Troubleshoot a Failed User Login

If you fail to log in to IBM Sterling B2B Integrator, consider the following factors:

- Passwords are case-sensitive. Check whether the Caps Lock key is off.
- Repeatedly entering an invalid User ID and Password can lock you out of the system. The system administrator configures the number of failed login attempts that are allowed.

If you are locked out, try the following strategies:

- Log in using any other computer that has access to IBM Sterling B2B Integrator. Lock outs affect only the computer being used and do not apply to the User ID or Password being attempted.
- Wait for thirty minutes, which is the duration of the lock out. Then try again using the same computer.
- Request the system administrator to deactivate the lock. The administrator uses the Lock Manager page in IBM Sterling B2B Integrator to deactivate the lock.

Lock Out Parameter

The lock out parameter specifies the number of consecutive failed login attempts that are allowed before a user is locked out of the application.

By default, the lock out parameter (ConsecFailedAttempts) is set to 0, which tells the login servlet to not lock users, regardless of the number of failures. System administrators can set this lock out number to any numeric value by editing the `ui.properties.in` file in the properties directory.

CAUTION:
Make changes to the `ui.properties.in` file and not the `ui.properties` file. If you make changes to the `ui.properties` file, and restart the system, the changes you made to the `ui.properties` file are overwritten by the `ui.properties.in` file.

The ConsecFailedAttempts parameter controls the user lock out behavior for:

- IBM Sterling B2B Integrator Administration Menu

- FTP Server Adapter
- SSH/SFTP Server Adapter (for SFTP and SCP protocols)
- MBI (Mailbox Browser Interface)

Edit the Lock Out Parameter

About this task

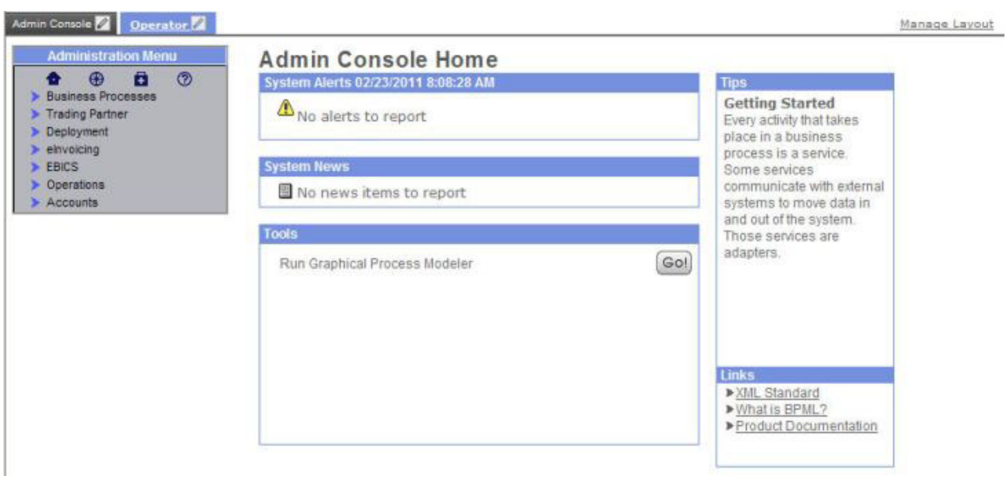
To edit the lock out parameter:

Procedure

1. Stop IBM Sterling B2B Integrator.
2. Navigate to the installation directory.
3. Navigate to the bin directory.
4. Navigate to the properties directory.
5. Locate the `ui.properties.in`.
6. Using a text editor, open `ui.properties.in`.
7. Locate the `ConsecFailedAttempts= 0` entry.
8. Highlight and change 0 to the new number of login attempts.
9. Save the `ui.properties.in` file under the same name in the same location.
10. Run the **setupfiles** script.
11. Restart IBM Sterling B2B Integrator. The changes you made in the `ui.properties.in` file are applied to the `ui.properties` file and are applied to all user accounts.

Admin Console

When you log in to IBM Sterling B2B Integrator, the Admin Console pane is displayed. The following figure illustrates the Admin Console pane.



The Admin Console pane is your access point to all the standard IBM Sterling B2B Integrator features. The UI uses a dashboard design that enables the display of additional optional panes that are available with other IBM Sterling B2B Integrator applications. The Operations option provides access to system administration information, including system troubleshooting, performance tuning, system logs, and license information.

The interface display can be customized in a variety of ways. Therefore, if any of the following are true, the Admin Console pane may not be displayed when you log in, or look different from that shown in the previous figure:

- You are logged in to a IBM Sterling B2B Integrator edition, such as the AS2 Edition. In this case, an edition-specific pane may be displayed.
- The permissions associated with your user account limit your navigation of the UI to a smaller subset of components. In this case, some of the menu options may not be displayed.

For purposes of exploring the interface, this documentation assumes that your interface contains all the standard menu options and that the Admin Console pane is your entry point to the system.

Portlet View Pane

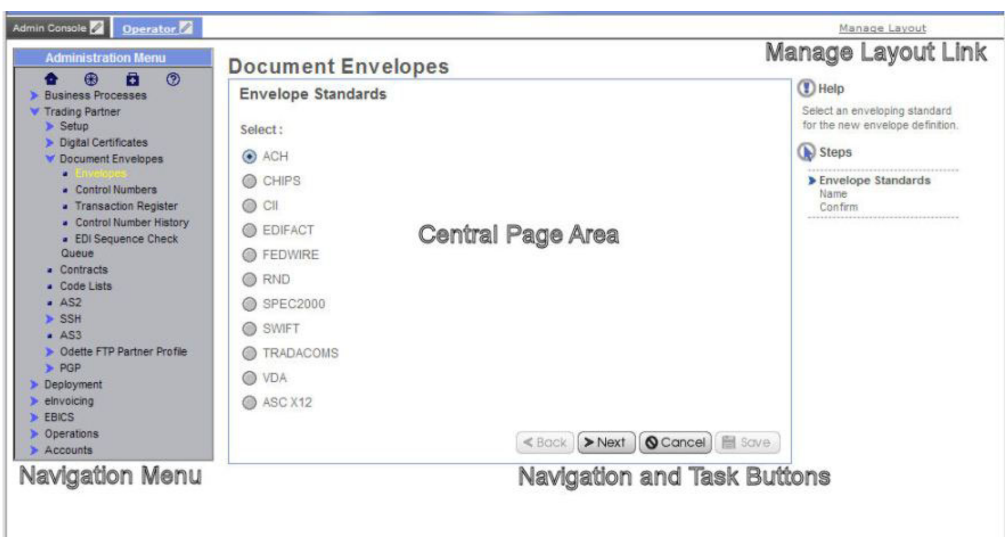
While the Admin Console is, by default, the Home page of the IBM Sterling B2B Integrator interface, other panes can be tailored for more specific uses through the use of *portlets*, that is, snapshots that are arranged on the pane to work as windows to your system activity.

The portlet view panes, such as the Operator pane (click the tab to view it), provide at-a-glance visibility into your processing operations. You can customize your panes and select a specific portlet display to better suit the way you use IBM Sterling B2B Integrator.

Procedure Page

Procedure pages are the typical pages used in the Admin Console pane, as well as the home page pane for the AS2 edition, to enable you to complete necessary activities, such as configuring services and adapters, creating trading partner profiles, creating reports, and searching for specific information.

The following figure shows the standard parts of the interface pages:



The following table describes the labeled parts:

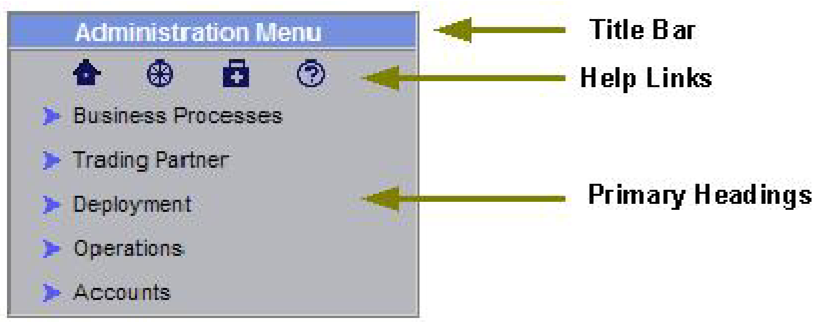
Page Component	Description
Manage Layout link	Links to the Customize pane for customizing Dashboard panes. You can customize the pane and portlet content.

Page Component	Description
Navigation menu	The appropriate menu is displayed according to the pane your are in. Provides access to process-related activities.
Central page area	Displays the page title and the body of the page that are related to the menu selection used to navigate to the page.
Navigation and task buttons	May include **Back**, **Next**, **Cancel**, **Return**, **Save**, **Validate**, and **Finish**. Enables you to navigate back and forth in the pages that make up a procedure, save changes, complete a task, cancel a procedure, or return to the initial page in a procedure or topical area. **Note:** Always use the IBM Sterling B2B Integrator **Back** and **Next** buttons instead of your browser's Back and Forward arrow buttons. Using the browser buttons may cause errors.
Page information	Describes the page and how to use it. May include a list of steps to complete a task.

Menus

The menus in the IBM Sterling B2B Integrator Dashboard interface work in the same manner to provide access to the different components of IBM Sterling B2B Integrator.

The following figure displays a typical menu with the parts labeled:

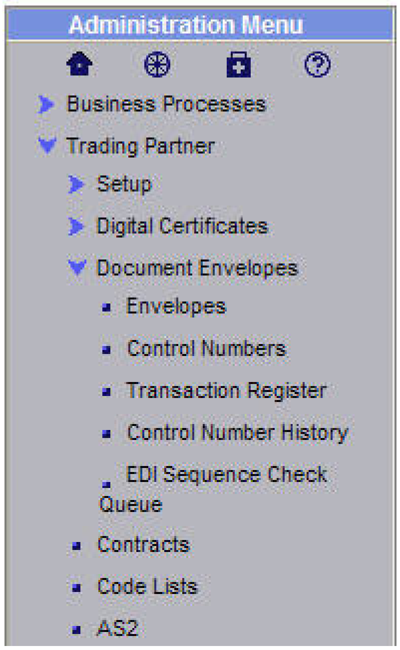


The following table describes the parts of the menus:

Menu Component	Description
Title bar	Identifies the menu.
Help links	Provide quick navigation: • **Home**– Displays the home page for the application or functional area you are working in. • **Site Map**– Displays a site map of the application or functional area you are working in. Items on the site maps are links that can be used to navigate to a specific interface component. • **Support**– Displays information about how to get technical support and contains a link to open a support case. • **Help** – Opens a separate window to display the onlinw Documentation Library, where you can access all IBM Sterling B2B Integrator documentation.

Menu Component	Description
Primary headings	Indicates the categories of menu selection you can access by expanding the headings. To expand the menu, click the primary heading. Click again to hide the related menu options.

Some primary headings have secondary headings under them, providing access to another tier of menu options. The following menu shows a primary heading, **Trading Partner** and a secondary heading, **Document Envelopes**. Both these headings can be expanded by clicking the corresponding arrow:



The following table describes the primary heading menu options of the Administration Menu because they relate to specific tasks. Remember that some of the menu options illustrated and described in this document may not be displayed in your interface, depending on the permissions assigned in your user account by the administrator who created it.

You should navigate to the Admin Console pane in the interface as you read this section to gain a better understanding.

For information about the specific activities you can perform from a given page, see the page information (Side Help) on the corresponding page in the interface.

Primary Menu Heading	Description
Business Processes	Provides access to pages for business process management activities, including: • Accessing the Graphical Process Modeler to create business process models • Creating, deleting, and searching for business process definitions • Checking business processes in and out of IBM Sterling B2B Integrator • Starting, stopping, enabling, and disabling processes • Monitoring current processes for information such as status, start and stop time, and errors • Determining what other processes are related to a specific business process • Searching for information about service activity within a business process • Performing a wide range of advanced searches for business processes, documents, EDIINT transactions, and ebXML message flows
Trading Partner	Provides access to pages for trading partner management activities, including: • Creating, modifying, and searching for trading partner profiles • Configuring and searching for advanced trading partner information such as transport records, document exchange information, delivery channels, and packaging information • Creating, checking in, and searching for digital certificates • Creating, configuring, and searching for document envelopes and related information such as contents of the EDI Sequence Check Queue and the control number history • Creating and locating contracts • Creating and locating code lists • Configuring SSH Remote Profiles • Managing Odette FTP Partner Profiles • Managing PGP Server, PGP Partner, and PGP Sponsor

Primary Menu Heading	Description
Deployment	Provides access to pages for services-related activities, including: • Searching for information about specific services • Creating and searching for service configurations • Creating and searching for schedules for business processes and services • Accessing the Map Editor application and EDI or CII standards • Checking in and searching for translation maps, XSL style sheets, XML schemas or DTDs, WSDLs (Web Services Description Languages), and Collaboration Protocol Agreements for ebXML • Checking in, searching for, and exporting Web templates and resources • Creating and managing mailboxes • Checking in and searching for ebXML Business Process Specification Schemas and assigning business processes to activities in a schema • Importing and exporting system resources • Configuring adapter utilities such as SAP or SWIFTNet • Creating and packaging custom services and adapters
Operations	Provides access to pages for systems operations-related activities, including: • Troubleshooting system problems • Creating, scheduling, searching for, and viewing other reports • Configuring performance tuning • Entering a support case • Viewing system logs • Updating and searching for product licenses • Monitoring running threads and messages • Configuring and managing archive settings and locked resources • Adding and configuring perimeter services • Configuring and managing proxy servers
Accounts	Provides access to pages for user account-related activities, including: • Creating and searching for user groups, permissions, accounts, and password policies • Creating and searching for user news messages • Modifying your user account settings

Wizard Pages and Navigation Buttons

IBM Sterling B2B Integrator uses wizard pages to guide you through the steps involved in your procedures, such as configuring services and adapters, creating trading profiles and user accounts, and so on.

Wizards present fields in sets on a progressive series of interface pages. The fields are used to collect information on configuration, such as a trading profile. Each of the wizard pages, which progress in a logical order, comprises a set of fields and navigation buttons. After you enter the data for the first set of fields in a page, you click a navigation button, such as **Next**, to progress to the next page. This process continues until you complete the steps involved in a given task. For example, when you select **Business Processes** > **Manager** from the Administration Menu, the Business Process Manager page is displayed. By clicking **Go!** adjacent to the words **Create Process Definition** you start the related wizard page flow, in this case, the Business Process flow.

The first page in the Business Process wizard requires you to enter the relevant information and therefore presents a set of navigation and task buttons that you must use to navigate within the wizard and eventually save the required data.

All the wizard pages in IBM Sterling B2B Integrator use navigation and task buttons in the same manner, as shown in the following figure:

In this example, the **Back** button is inactive because this is the first page of a wizard. The **Save** button is inactive because you have not yet reached a point in the configuration at which you can save the data. Similarly, on the last page of a wizard, the **Next** button is inactive. To complete a configuration, click **Finish**. The system displays `Finish` and not `Save` in the last page of a wizard.

As you progress through the various procedures in the IBM Sterling B2B Integrator wizards, you may find that you have to confirm or change the settings you entered in a previous page. The **Back** and **Next** buttons enable you to navigate freely among the pages in the flow, while saving the data you entered. At any time, you can click **Cancel** to exit the wizard without saving new or modified data.

When you click **Finish** to complete a configuration, IBM Sterling B2B Integrator displays a message indicating that the system is updated with the information, and a **Return** button. Clicking **Return** displays the page from which you initiated the wizard.

The system also displays the **Return** button on pages that enable you to view a list or table of information, such as user account names or trading partner profiles, or detailed information accessed through a link or table. Clicking **Return** always exits the current page and displays the page from which you navigated to the information.

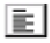
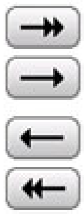
When you navigate the IBM Sterling B2B Integrator interface, use the navigation tools in the interface instead of the Web browser's **Back** and **Forward** arrow buttons. Using the **Back** and **Forward** arrow buttons may cause errors.

Icons

IBM Sterling B2B Integrator uses a set of icons throughout the interface to help you quickly identify information on pages and to navigate effectively to complete the required tasks. The following table provides a list of these icons and their descriptions:

Icon	Description
	*Customize pane or customize portlet* displays the Customize pane for the appropriate tab or the Customize portlet pane for the portlet.

Icon	Description
	*Home* displays the Admin Console Home page (from the Administration menu).
	*Site Map* displays a site map of the component you are working in.
	*Support* displays information about how to get technical support.
	*Help* opens a separate window to display the Online Documentation Library, where you can access all of the product documentation.
	*News* indicates a message posted by an administrator.
	*Calendar* provides you with a means to select a day in the context of a schedule.
	*Pane* (on the Customize pane) represents a pane in the Dashboard.
	*Alert* indicates an alert from the system or a system administrator.
	*Page information* provides instructions about the page you are in (also called Side Help).
	*Related steps* along with Side Help, this indicates the steps related to completing the procedure you are in.
	Status indicator: • For business processes – Indicates that the process is not encountering errors or warnings at this point in the execution, or has not encountered errors during recent execution.
	Status indicator: • For business processes – Indicates that the process is in one of the following states: – Waiting for other activities to complete before continuing execution – Encountering errors or warnings during execution – Ended and encountered errors or warnings during execution
 or 	*Information*, click to open a separate window to display more details about the related item.
	*Edit*, click to modify the related item in the list or table (such as a user account or trading profile identity). In some instances, this icon may also be displayed without the word 'edit'.
	*Delete*, click to delete the related item in the list or table.
	*Copy*, click to copy the selected item in the table or list, such as a trading partner profile.
	*Clear* removes a corresponding selection from a list or table display.
	*No security* indicates that the item or service is not configured with security settings.
	*Add*, adds a configuration (such as a trading partner) or value (such as a schedule exclusion value).

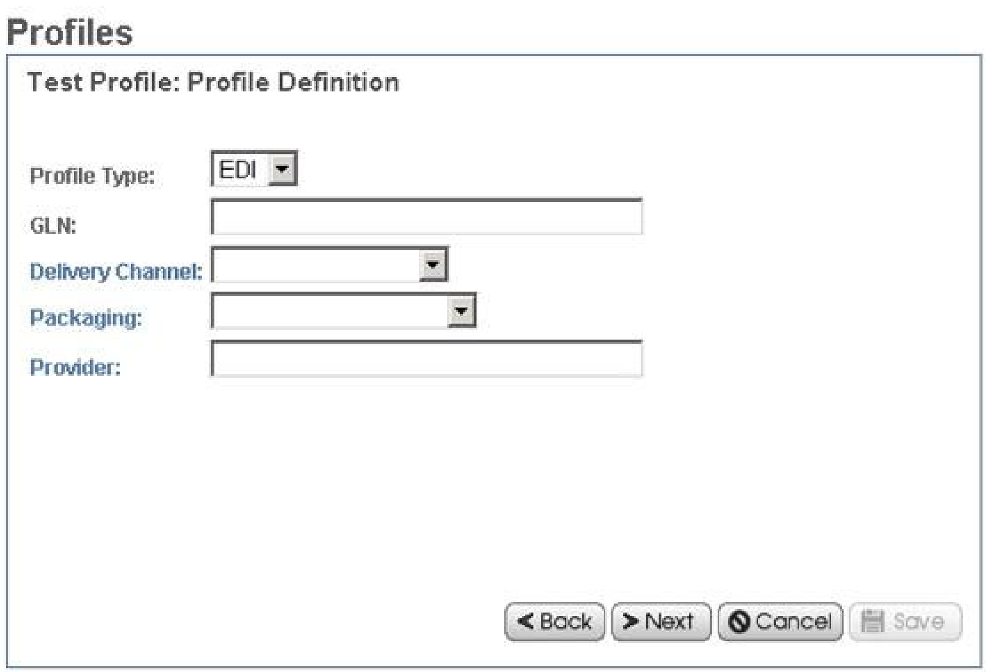
Icon	Description
	*Tree view* displays a hierarchical view in a separate window of the indicated item, such as service types.
	*List view* displays a list view in a separate window of the indicated item, such as service types.
	*Filter* limits search or selection criteria to the data you enter.
	*Move buttons* enables you to select items in a side-by-side pair of lists and move them back and forth between lists. The double arrow moves the entire contents of the list. A single arrow moves only the selected item.
	*Warning* precedes a system message. If this icon is displayed, contact the administrator.
	*Refresh*, click to refresh the data to display the most current information.

Required Fields

IBM Sterling B2B Integrator requires you to enter data in certain fields before you can progress to the next page in a procedure or to complete a task. These fields are called *required* fields.

In the Admin Console pane, these fields are indicated by colored text for field names.

The following figure shows the required fields in the Admin Console pane:



Note: Within some applications the asterisks (*) indicates required fields.

If you attempt to progress to the next page in a procedure without providing information in all the required fields, IBM Sterling B2B Integrator displays a system message indicating the missing information. You cannot progress further until you provide the necessary data.

Date and Time Formats

The IBM Sterling B2B Integrator interface uses a variety of formats for date fields in the interface. Some fields provide an example entry to guide you. The following figure shows one such field:

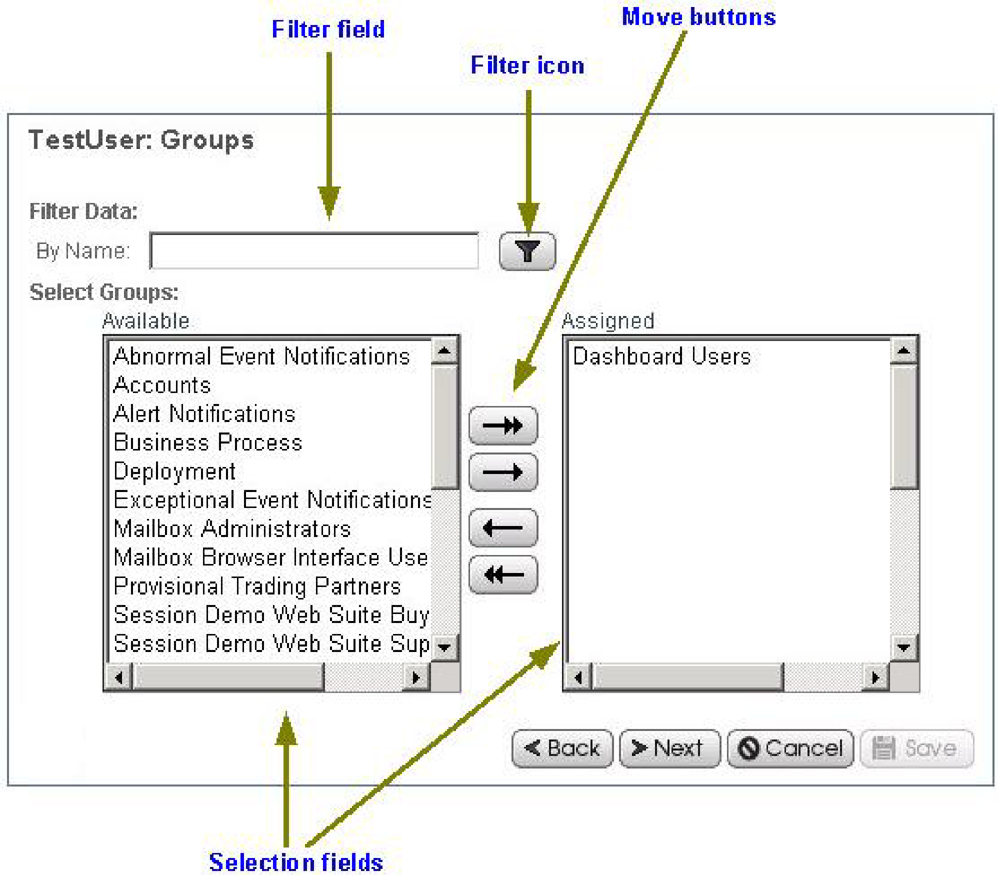
In some pages, the format for the date fields is not provided. If you are not sure, enter the date in the MM/DD/YYYY format. If the format you have used is incorrect, when you try to progress to the next step in the procedure or attempt to save the information, IBM Sterling B2B Integrator displays a system message with instructions about the required format.

Note: Your system administrator may have set up a custom format for Date and Time. If so, they can provide you with the necessary instructions.

Enter time values in the following HH:MM format. In search fields that contain boxes for entering both a calendar date and a time, if you enter a date, you must also enter the time and if you enter the time, you must also enter a date.

Filter and Group Selection Fields

Some wizard pages within a procedure use filter fields to ease the process of selecting the appropriate data for a value. Filter fields enable you to limit the options. Often, filter fields are used in conjunction with group selection fields and move buttons, which make it easy for you to select a group of options at one go. The following figure shows an example of a filter field and group selection fields in the IBM Sterling B2B Integrator interface:



To use a filter field, type the complete word, partial word, or phrase in the field and click the filter icon  . IBM Sterling B2B Integrator displays only options that match your filter criteria in the available options list. You can enter new filter criteria and repeat the process as many times as required. Each time you filter the display, the list displays only the entries that match your most recent filter request.

To restore the entire contents of the list, clear the filter field and click the filter icon.

Group selection fields enable you to select or remove options, either individually or in groups. The left pane contains the available options. The right pane contains the options you select (these are 'assigned' options). To use the group selection fields, use the move buttons as described next:

- Click the right double-arrow to move all options from the Available pane to the Assigned pane.
- Select one or more options and click the right single-arrow to move your options from the Available pane to the Assigned pane.
- Click the left double-arrow to move all options from the Assigned pane to the Available pane.
- Select one or more options and click the left single-arrow to move your options from the Assigned pane to the Available pane.

Searches

The IBM Sterling B2B Integrator interface supports a variety of simple and advanced searches. For example, you can either perform a simple search to locate a business process by name or an advanced search for a business process by specifying multiple criteria, including name, date, instance ID, and start time.

The IBM Sterling B2B Integrator interface enables you to search for nearly all the entities related to your use of the system, from system processes to sets of data used to regulate or enable processes. For example, you can search for:

- Active, archived, and restored business processes
- Trading partner profiles and related data such as identities, transport, and packaging information, contracts, and code lists
- Documents processed
- Service activity information and service configurations
- Transaction information
- Interchange information
- Standards information
- Schedules
- Maps
- Resources
- User accounts.

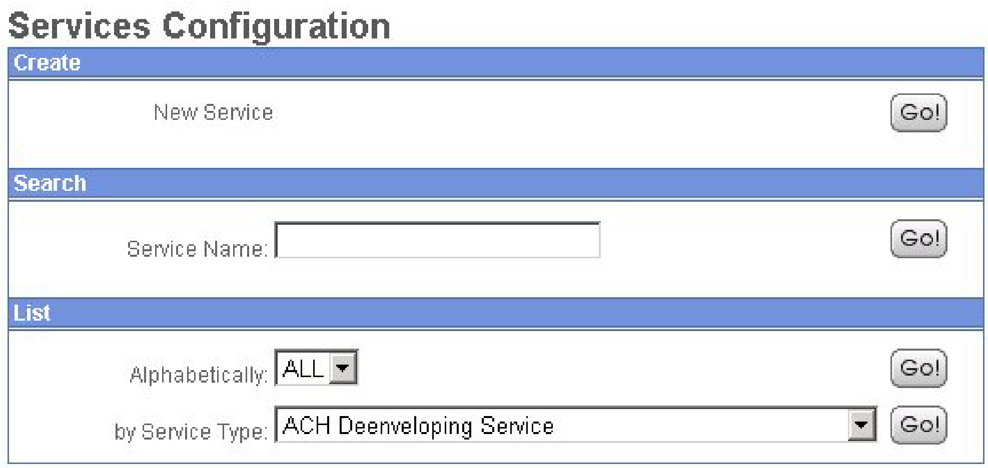
For information about the procedure for searching a specific entity, see the appropriate topic in the online documentation library.

Basic Search and List Search

Basic standard searches and list searches are used throughout the Admin Console interface.

Generally, any page in the Admin Console that enables you to enter and save information, such as a trading profile, service configuration, or user account, also enables you to perform basic standard searches and list item searches for the items you save. Use these searches to find previously saved information that you want to view or modify.

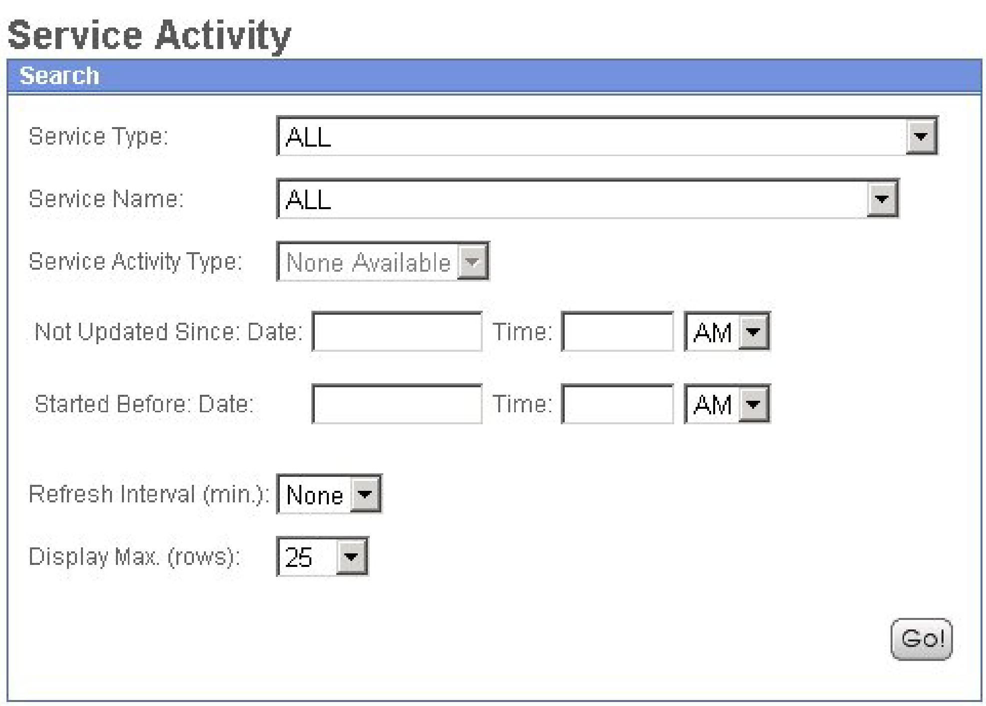
The following figure shows a page in the Admin Console that enables both a standard basic search and a list search:



In this example, the basic search enables you to perform a simple search on the name of a service. The List option enables you to locate a service by listing all the service configurations, filtering your search based on your alphabetical selection, or by listing all the services of a selected type.

Throughout the interface, many list searches provide search options that help narrow down the data to be displayed in the list. Both basic searches and list searches display results in a list. You can select the corresponding item in the list to view or modify the related data.

Some basic searches enable you to enter more information to narrow down the search. The following figure shows a basic search feature that enables you to provide a variety of search parameters to locate a specific service activity record:

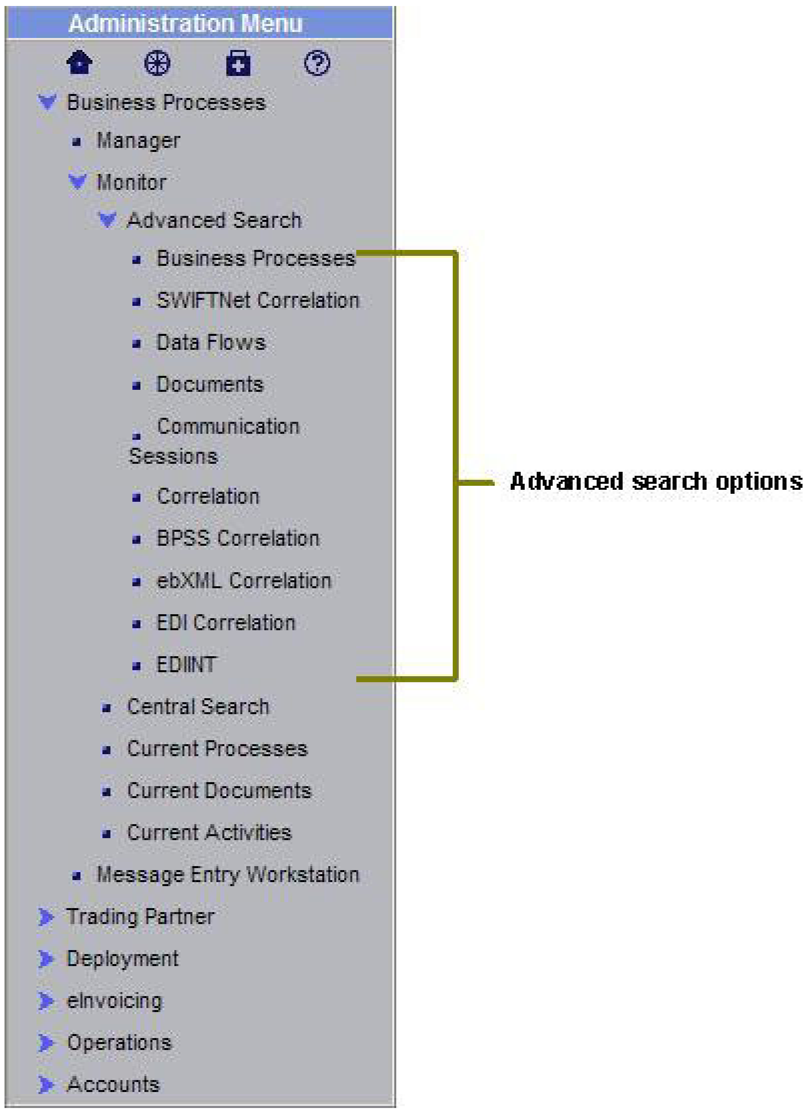


Advanced Search

From the Administration Menu in the Admin Console pane, you can access a variety of advanced search options designed to ease the process of locating a range of data related to your processes.

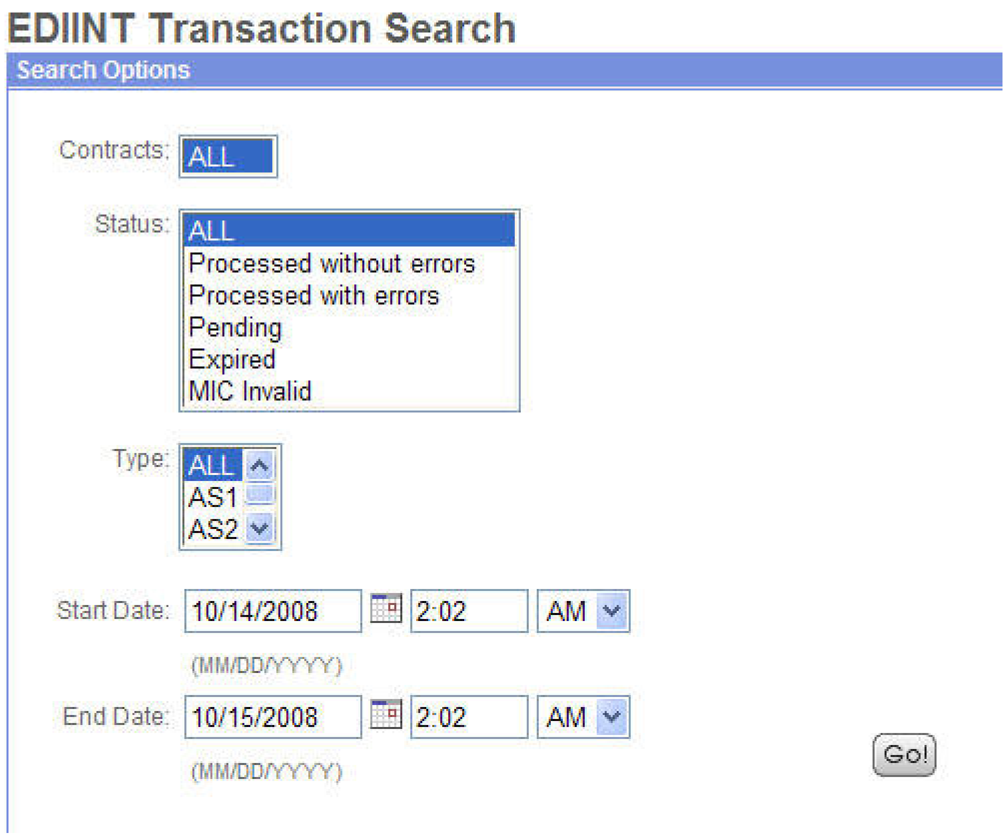
To locate advanced search options in the Administration Menu, select **Business Processes** > **Monitor** > **Advanced Search**.

The following figure shows the Advanced search options in the expanded menu:



- Sterling B2B Integrator to search live tables or restore tables for the desired data you are searching for
- Select date and time ranges
- Specify parameters such as IDs, control numbers, status, related data, and transport method.

The following figure shows an example advanced search page, the EDIINT Transaction Search page, that enables you to select the associated contract, status, and transport type, and enter a start and end date and time:

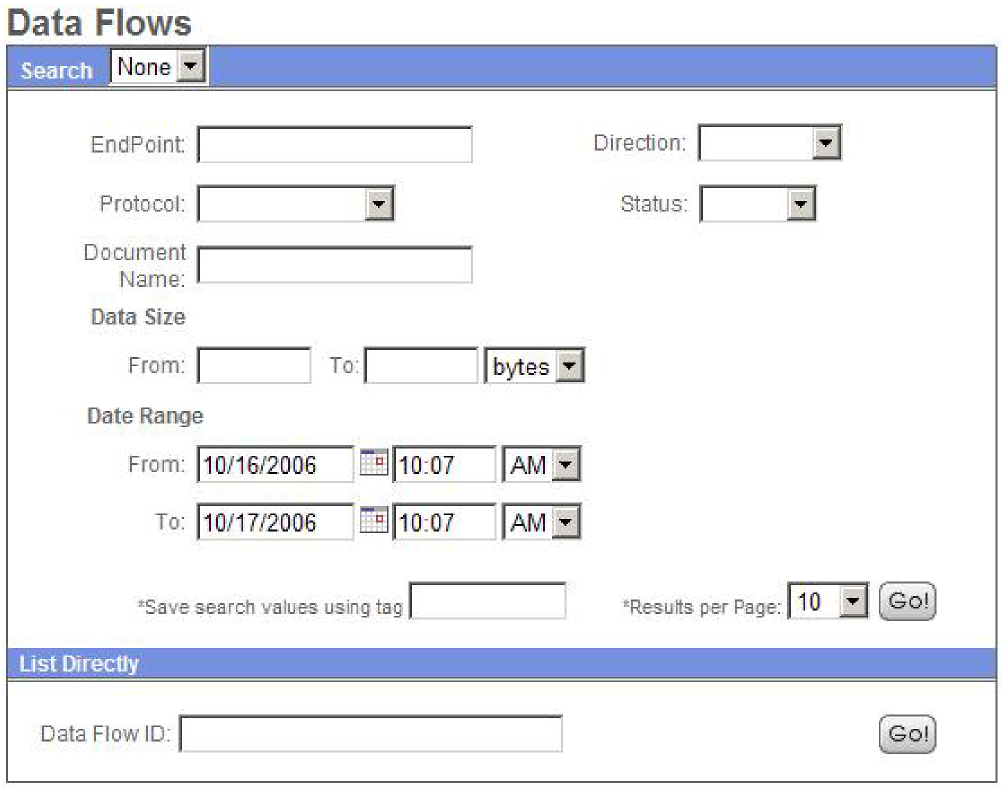


Data Flows Search

IBM Sterling B2B Integrator enables you to enter search criteria for tracking data that is moving into or out of IBM Sterling B2B Integrator by streaming through an adapter (data flows). You can use the Data Flows page to trace the document path using the following parameters:

- From the time it is transferred into IBM Sterling B2B Integrator.
- As it is processed by IBM Sterling B2B Integrator.
- When it is transferred out of IBM Sterling B2B Integrator to an external system.

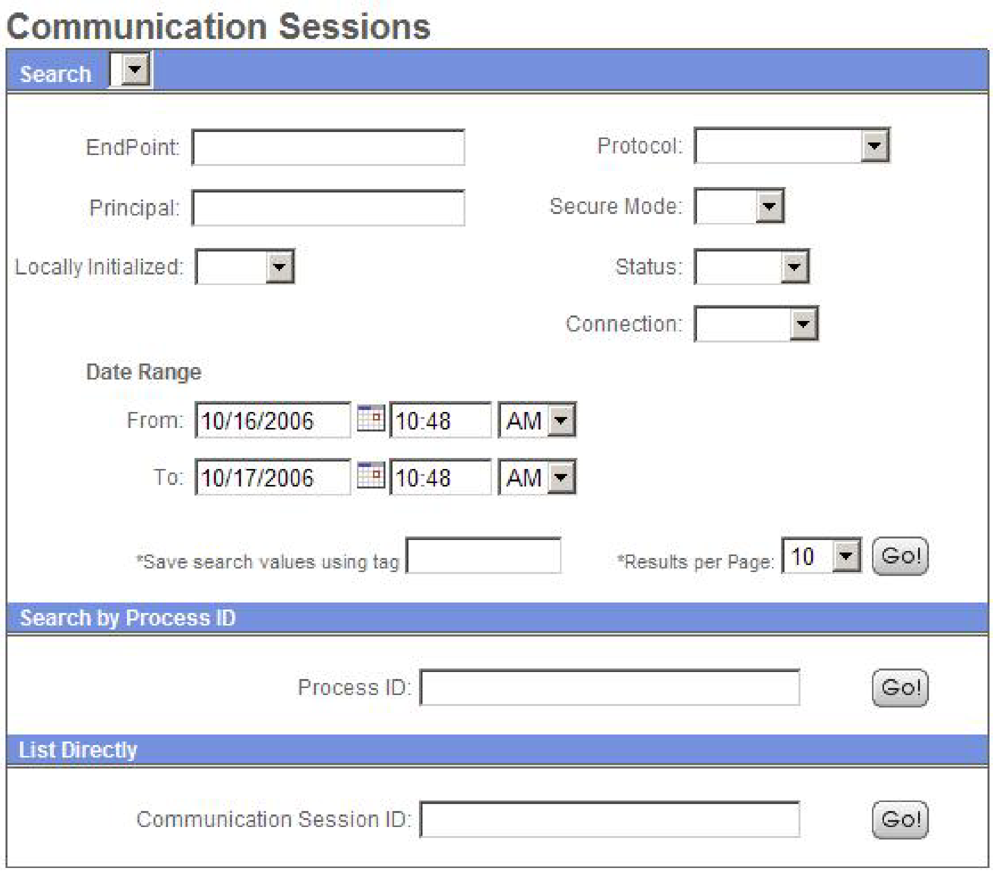
To track data flows, from the Administration Menu, select **Business Processes** > **Advanced Search** > **Data Flows**. The following figure shows the fields you use in a typical Data Flows search, populated with sample values:



Communication Session Records Search

IBM Sterling B2B Integrator enables you to enter search criteria to view communication session records. These records include the associated authentication, authorization, file transfer, or non-file transfer records, even if a document is not transferred and no data flow record is created.

To view communications sessions records, from the Administration Menu, select **Business Processes** > **Monitor** > **Communication Sessions**. The following figure shows the fields you use in a typical Communication Sessions search, populated with sample values:



Correlation Search

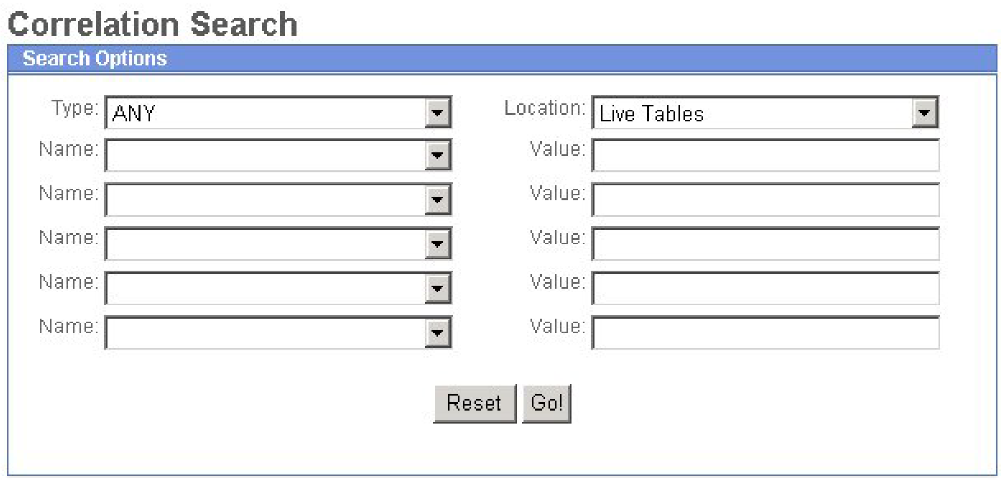
IBM Sterling B2B Integrator enables you to enter correlated search criteria to perform advanced *correlation searching*.

Correlation searches rely on name-value pairs to define the specific data items the system searches for. The defined data items are tracking points for business processes and documents. For example, instead of searching all of IBM Sterling B2B Integrator for a particular invoice, you can search for that invoice number, which saves you time.

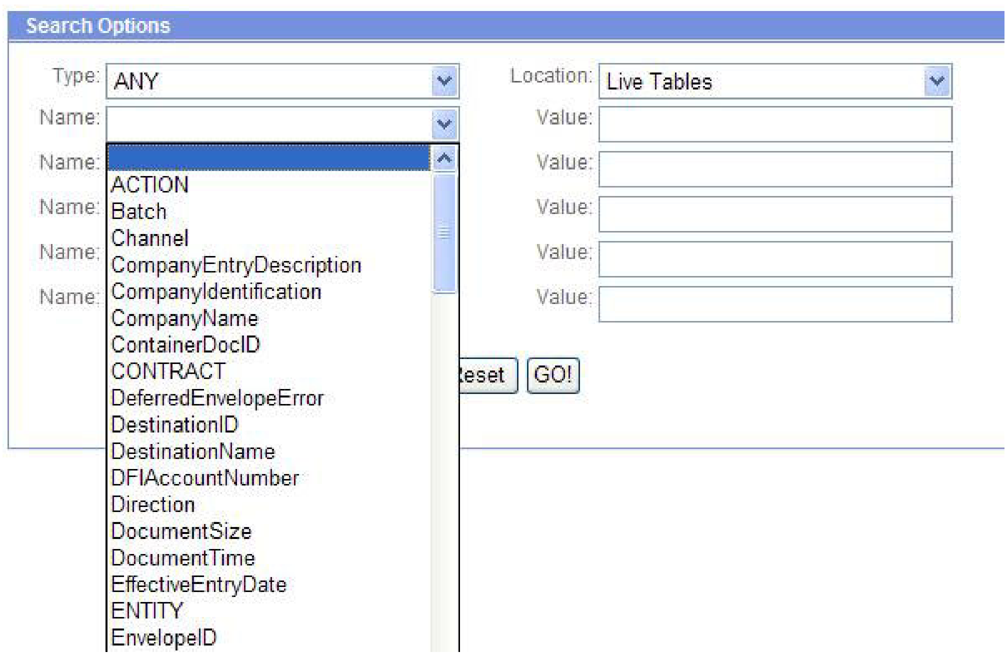
IBM Sterling B2B Integrator includes a correlation service that you can use to define a correlation that enables you to search for a specific data item. Correlations are either reconfigured and come with IBM Sterling B2B Integrator, or are created when a process runs.

The data for correlations is stored as name-value pair records in the correlation table in IBM Sterling B2B Integrator. You can search the data using the Correlation Search option.

The following figure shows the fields you use in a typical correlation search:



To enter a name-value pair, you select a value in one or more name fields and type the appropriate correlated value in the corresponding Value field. The following figure shows the drop-down menu of options for the Name fields:



The Advanced Search options in the Administration Menu provide specific pages for performing correlation searches pertaining to EDI interchanges, groups and transactions, business process specification schemas, and ebXML message flows.

Portlet-Specific Search

Several of the available Dashboard portlets offer capabilities for performing specific searches, such as searches for business processes, documents, and Internet searches.

Associated External Applications

IBM Sterling B2B Integrator includes a variety of associated applications that operate external to the IBM Sterling B2B Integrator interface. Some of these applications are included with IBM Sterling B2B Integrator and some must be bought separately, based on your requirements.

The associated applications enable you to perform a variety of activities that are crucial to managing your processes using IBM Sterling B2B Integrator, such as creating data transformation maps and developing custom services. The applications contain features that integrate with IBM Sterling B2B Integrator, eliminating complex custom development requirements. For example, the Graphical Process Modeler (GPM) is an external application associated with IBM Sterling B2B Integrator. Although you install it separately (through the IBM Sterling B2B Integrator interface) and use it to create business process models in a graphical palette, the GPM is designed to work with IBM Sterling B2B Integrator; it enables you to check your processes into IBM Sterling B2B Integrator from the GPM interface.

The following table describes the external applications that work together with IBM Sterling B2B Integrator:

Application	Description
Map Editor	Offline, Windows-based user interface application for mapping data translation and transformation included with IBM Sterling B2B Integrator. Use it to translate documents to various data formats, including EDI, XML, SQL, CII, and others. You include the appropriate translation map and related services in your business process models to perform run-time translation.
Graphical Process Modeler (GPM)	Offline, Windows-based graphical interface tool included with IBM Sterling B2B Integrator to create and modify business processes. Converts the graphical representation of business processes to well-formed BPML (source code), and saves you the effort of writing code.
AS2 Edition	Optional, self-contained, Web-based application based on IBM Sterling B2B Integrator, which can work with or without the core IBM Sterling B2B Integrator product. A message management system enabling the exchange of a variety of documents between trading partners using secure AS2 EDIINT technology. The interface uses familiar IBM Sterling B2B Integrator conventions for ease of use.
MESA Developer Studio	A tool used to connect with a IBM Sterling B2B Integrator instance for resource access and control of IBM Sterling B2B Integrator operations, change the template that IBM Sterling B2B Integrator uses, and develop custom services, all from within a development environment.In addition to MESA Developer Studio, the following plug-ins are available: • MESA Developer Studio SDK – For developing and deploying custom services and adapters. The MESA Developer Studio SDK requires a separate product license. • MESA Developer Studio Skin Editor – For customizing the look and feel of the IBM Sterling B2B Integrator interface. • Reporting Services – A separately-licensed set of plug-ins used to create fact models and reports for Reporting Services.

External applications are installed in different ways. All the associated external applications are displayed in windows that are separate from the IBM Sterling B2B Integrator interface.

Access the Map Editor

The Map Editor can be installed only after IBM Sterling B2B Integrator is installed because the Map Editor has to be downloaded from IBM Sterling B2B Integrator. An installation wizard guides you through the necessary steps. For more information about system requirements specific to Map Editor, see *System Requirements*.

Open the Map Editor using the appropriate installation folder on your client computer.

Access the Graphical Process Modeler

The Graphical Process Modeler (GPM) can be installed only after IBM Sterling B2B Integrator is installed because the GPM has to be downloaded from IBM Sterling B2B Integrator. While the resource files for the GPM are available on your client computer after installing IBM Sterling B2B Integrator, the GPM is not automatically installed on your client computer.

Open the GPM by clicking **Go!** adjacent to Run Graphical Process Modeler in the Administration Menu. IBM Sterling B2B Integrator installs the GPM on your client computer.

IBM Sterling B2B Integrator uses Java™ Runtime Environment (JRE) 6.0 to launch the GPM. For more information about system requirements specific to the GPM, see *System Requirements*.

Note: When you launch the GPM, the system will verify if you have the Java 6.0 version installed. If you do not have the correct version of Java Runtime Environment (JRE), you must download Java Runtime Environment (JRE) 6.0 from the Oracle® Sun Development Network Web site before using the GPM. The minimum disk space required for GPM is 100 MB.

Access the AS2 Edition

To access the AS2 Edition, enter the user ID and password provided to you by your system administrator for the applications in the IBM Sterling B2B Integrator login page.

IBM Sterling B2B Integrator enables users to access the application based on the permissions associated with the user account, and displays the appropriate interface.

The AS2 Edition is designed using the IBM Sterling B2B Integrator conventions to make navigation and conventions familiar. Menus, Help options, and procedure flows work the same way they do in the IBM Sterling B2B Integrator core product interface.

Access the MESA Developer Studio

IBM Sterling B2B Integrator MESA™ Developer Studio is an Integrated Development Environment (IDE) that uses Eclipse software plug-ins. To use the MESA Developer Studio, you must install Eclipse 3.x, Java 2 SDK Standard Edition

6.0 or higher, and the MESA Developer Studio Eclipse plug-ins. For more information about installation and configuration instructions, see the *MESA Developer Studio* documentation.

Help Links and Tools

The following table describes the tools and links that provide access to various help information in the IBM Sterling B2B Integrator interface:

Help Link or Tool	Description
Support icon	Displays the Technical Support Contact Information page, which provides: • A link to the Customer Center • Current product versions (for your reference when reporting problems) After a product update, the version number that is displayed depends on the availability of a new license file. If a new license file is available (upgrade), IBM Sterling B2B Integrator displays the latest point version. If a new license file is not available (patch), IBM Sterling B2B Integrator displays the same point version with the latest build number. • A link to the Customer Reference Guide, where you can view the Technical Support contact information • The Utility to upload case data to the IBM Sterling B2B Integrator support link, which allows you to submit a support request to tehcnical support team
Help icon	Opens a separate window to display the online documentation library.
Page Information icon (Side Help)	Indicates instructions (printed next to the icon) about using the interface page you are on or the information displayed on the page.
Related Steps icon (Side Help)	Displays page information (Side Help) to indicate the steps related to completing the procedure you are in.
Support Case Tool	Enables you to submit a support request to the techical support team. You can access this tool using one of the following methods: • Click the Support icon. Click **Utility to upload case data to** IBM Sterling B2B Integrator **support**. • In the Administration Menu, select **Operations** > **System** > **Support Tools** > **Support Case**.

Online Documentation Library

The online documentation library is a Web-based hub for all the documentation pertaining to IBM Sterling B2B Integrator. All product documentation pertaining to IBM Sterling B2B Integrator is available from the documentation library, for online viewing and downloading.

The documentation library enables you to:

- Search the content using words, phrases, or boolean (`and`, `or`, and `and not`) criteria
- Browse the documentation online

- Download PDF copies of the documentation

Access the documentation library by clicking the Help icon ( ) in the Administration Menu.

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