

IBM WebSphere Transformation Extender



Partner Manager

Version 7.8

Note

Before using this information, be sure to read the general information in "Notices" on page 137.

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This edition of this document applies to IBM WebSphere Transformation Extender Partner Manager Version 7.8; and to all subsequent releases and modifications until otherwise indicated in new editions.

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Chapter 1. Introduction

Trading Manager is client/server software for managing and processing electronic commerce data. Partner Manager is a component of Trading Manager and is the graphical user interface application used to create a comprehensive database of an organization's electronic commerce (e-commerce) information and to manage its e-commerce activity.

Overview

This guide focuses on the Partner Manager graphical user interface portion of Trading Manager. The Trading Manager Installation documentation describes the Trading Manager software. For information about Partner Manager's XML Autoload Utility, refer to the XML Autoload Utility documentation.

What is Partner Manager?

Partner Manager is a data management system for defining and viewing electronic commerce activity. Typically, an e-commerce administrator such as an EDI coordinator uses Partner Manager. As part of Trading Manager, Partner Manager is used to define your trading relationships with your e-commerce partners. Information is maintained on each trading partner including address information, contact persons, and the individual organizational entities with which you trade business information.

Use Partner Manager to:

- Define post offices; direct links using FTP, Value Added Networks (VANs), or e-mail to enable you to communicate with your partners
- Define the trading relationships with your EDI partners, including details such as the individual document level for its version, control numbering schemes, tracking, error handling, status, and post office used
- Provide audit and control information collected in the Trading Manager database, which you use to monitor your organization's ongoing inbound and outbound e-commerce transaction activity
- Be alerted to error conditions in e-commerce inbound or outbound processing

Theory of operation

Use Partner Manager to define:

- One or more internal trading partners
- One or more external trading partners
- Two or more post offices
- Trade links to associate internal trading partners with external trading partners
- Information the two trading partners exchange

The information from Partner Manager is shared with the Launcher component of Trading Manager for validating, tracking, and routing e-commerce data. Information about this e-commerce activity is then incorporated into the Partner Manager database for monitoring and reporting.

Trade Links and Partner Manager

A primary Partner Manager function is the definition of trading relationships, also known as trade links. A trade link consists of four fundamental components:

Internal Trading Partner

An internal trading partner is defined in the **Address Book** navigator. This information identifies the EDI settings for an internal entity that sends and receives e-commerce data to and from another organization. Internal trading partners answer the question *Who are we?*

External Trading Partner

An external trading partner is also defined in the **Address Book** navigator. This information identifies the EDI settings for an entity with which internal trading partners exchange data. External trading partners answer the question *Who do we exchange data with?*

Post Office

A post office identifies where data to be processed by Trading Manager is located and the necessary configuration settings that Trading Manager needs to access that data. Post offices are defined from the **Post Offices** navigator. Post offices answer the question *Where is the data retrieved and routed when its processing is complete?*

Application

An application identifies the type of messages or documents that are exchanged between an internal and external trading partner. A minimum of one application is defined as part of the **Link Wizard** from the **Trade Links** navigator. Other applications can then be defined from the Trade Links navigator. Applications answer the question *What types of information do we exchange with a particular trading partner?*

Partner Manager interface

The Partner Manager interface, as shown below, includes navigators, forms, the toolbar, the menu bar, command buttons, an Editor, reports, and right-click context menus.

Partner Manager functions are available from the main menu, right-click functionality, and toolbar.

Navigators

Partner Manager provides four navigators to help you define and view e-commerce information:

- **Address Book** navigator enables you to define trading and application partners. Use this navigator to store information about your internal organization's set of trading partners, your external trading partners, and their departments or application groups
- **Post Offices** navigator enables you to specify routing instructions for inbound data, outbound data, and error reporting. You can define the mail routes, FTP connections, e-mail addresses, or value added networks that you use to exchange data with your trading partners
- **Trade Links** navigator enables you to define trading partner relationships. Trade links connect a trading relationship with specific instructions for routing, error handling, and tracking. Partner Manager wizards help you construct and maintain trade links quickly and easily. Trade links connect you to your trading partner for each document that you trade with that partner.

- **Utilities** navigator contains utilities that allow you to make configuration changes, change database settings, organize trading partner subfolders and to modify security information.

Toolbar

The toolbar is a part of the Partner Manager window that provides you with quick access to various tools to invoke Partner Manager actions.

Form area

The form area displays dialog boxes and forms when you click a navigator folder. You enter trade and application partner, post office, trade link, and other information in the dialog boxes and forms that display here.

Audit Info button

Audit information is available throughout the Partner Manager; for example, when you edit trading or application partners, the edit dialog box includes an **Audit Info** button. The audit facility tracks the creation and creator of each entity by using a date, time stamp, and the user ID of the person that originally created the entry. This data is also stored in the database for providing of an audit trail of all changes. All subsequent changes are logged in the audit database with the date, time, and user ID of the party making the change.

To view audit information

1. Click **Audit Info** on forms where the button is available.
The **Audit Information** dialog box appears.
2. View the information.
Click **OK** to close the **Audit Information** dialog box.

Chapter 2. Getting started

Procedures described in this chapter enable you to:

- Start Partner Manager from the **Start** menu
- Start Partner Manager from the Windows desktop using a database-specific icon
- Select a database different from the default Partner Manager database
- Create, edit, and delete a database profile
- Merge and copy databases

Starting Partner Manager

Note: Before you start Partner Manager, ensure that you are using the latest open database connectivity (ODBC) drivers from your database vendor. For example, if you are using the Microsoft ODBC Driver for Oracle, you must also install the Oracle Client on the client machine.

- You start the Partner Manager interface from the Windows **Start** menu or from an icon on your desktop.
- You can also customize the Partner Manager startup configuration to use different database profiles.

Starting Partner Manager from the Start menu

The Partner Manager application may be started from the **Start** menu or a desktop icon.

To start Partner Manager from the Start menu:

From the **Start** menu, select **Programs > IBM WebSphere Transformation Extender *n.n* > Trading Manager > Partner Manager**.

Where *n.n* is the product version number.

Note: If user and group security are used, you must login with a valid user ID. See "Utilities".

The Partner Manager window opens.

Starting Partner Manager using a database-specific desktop icon

This technique is useful when you need to run multiple instances of Partner Manager or want to create an icon for each database you use. Information about the current profile in use is available by choosing **About** from the **Help** menu.

To start Partner Manager by using a database-specific desktop icon

1. Create a new database profile.
2. Open Windows Explorer.
3. Select **Desktop** in the folder navigator.

4. From the **File** menu, select **New > Shortcut**.
5. Enter the following in the **Command Line** field of the **Create Shortcut** dialog box:

```
install_dir\tmgr_vn.n\pmgr\partnermanager.exe profile
```

where *nn* represents the current Trading Manager version, and *profile* is the case-sensitive database profile you created. See "Utilities" more information.
6. Click **Next** and name the shortcut.
7. Click **Finish**.
8. To start Partner Manager, double-click the shortcut icon on the desktop.

Note: If the profile is incorrect or does not exist, the Partner Manager application uses the most recent valid database connection.

System requirements

The minimum requirements to install and run Partner Manager are:

- Design Studio is required to use the EDI Wizard
- System data source name

Database configuration

A default Microsoft Access database named **tmgrnn.mdb** is installed in the `install_dir\tmgr_vnn\pmgr` folder as part of the Partner Manager installation program (where *nn* and *n.n* refer to the current Trading Manager version).

The Utilities enables you to select a different database. Other Partner Manager utility procedures enable you to:

- Create, edit, and delete a database profile
- Merge databases
- Copy databases

Note: When entering data in Partner Manger be aware that case sensitivity can vary by Database Vendor and even by database instance. For example, Microsoft Access considers "Acme" to equal "ACME"; most other databases consider these fields unequal. Consult your DBA to determine if your database is case sensitive and plan your database entries accordingly, especially if using Partner Manger's copy and merge functionality between database vendors.

System Data Source Name (DSN)

A system data source name (DSN) is a user-defined name that links a database driver to a database. You must configure a DSN to access the default `install_dir\tmgr_vn.n\pmgr\tmgrnn.mdb` database (where *n.n* and *nn* represent the current Trading Manager version number). The Trading Manager Installation documentation describes how to create and configure a system DSN.

The DSN enables direct access to the database using an application like Partner Manager. When configuring open database connectivity (ODBC) DSN, you must create a DSN for each database to which you connect.

Chapter 3. Address books

The **Address Book** navigator is used to define the internal and external trading partners at the corporate, application, departmental, or divisional levels.

Procedures described in this chapter enable you to define:

- Trading partners in your organization
- Trading partners in organizations you do business with

From the **Address Book** navigator, you define trading partners internal and external to your organization. The **Address Book** navigator contains links for these trading partners. Internal links represent how your company is organized to manage your e-commerce relationships. Using these links, you define your company's internal partners, who represent your company as part of a trading partner relationship. External links enable you to define your trading partners in other companies or entities. These are the organizations that you do business with and represent the external trading partnerships that you establish.

Trading partner and application partner relationships

The trading partner and application partner relationships define how the trading partners and application partner associations are defined in Partner Manager.

One trading partner with one application partner

Your organization may choose to have a single *window on the world* in terms of your EDI profile: that is, defining all EDI address envelopes with a single company EDI address. Typically, companies with a centralized e-commerce function that manages all relationships use this approach.

In Partner Manager, a single trading partner representing a company may be defined with one application partner that represents the entire organization.

Many trading partners with one or more application partners

You can maintain multiple relationships with external trading partners. For example, you may have autonomous divisions who wish to do business under their own name but still share a single EDI system administered by an e-commerce group. In this case, define a new trading partner for each internal entity that requires its own address.

In Partner Manager, a trading partner may be defined for each division of a company. For example, one for Domestic Operations and one for International Operations. One application partner is defined for each trading partner.

One trading partner with many application partners

You may also want to maintain a single company address for the corporate level and separate addresses for each department or division. Define a single internal trading partner name and use the application partner entries to enable you to connect a given department with its trading partners, yet have all mail processed through the corporate partner relationship first. For example, you can define specific trading relationships with your dealer/distributor chain, your suppliers, and your customers. You may also configure relationships for each major

application: the Order Entry department as an entity receives all incoming orders; the Billing department processes invoices; and Human Resources handles healthcare enrollments and claims processing.

In this case, you configure a trading partner for the company and an application partner for each division.

Trading partners and application partners

The partners with which your organization exchanges e-commerce data can also be organized using the trading partner and application partner scenarios described in the previous sections.

Internal address book

Use the **Internal Address Book** to specify address information for partners within your organization.

- **Admin** - contains information about administrative contact persons associated with your organization's e-commerce programs, particular applications or trading partners, Trading Manager, and so on.
- **EDIFACT** - contains the definition of entities within your organization that maintain relationships with external trading partners, based on the Electronic Data Interchange for Administration, Commerce, and Transport (EDIFACT) standard.
- **TRADACOMS** - contains the definition of the entities within your organization that maintain trading relationships with external trading partners, based on the TRADACOMS UN/TDI Standard.
- **X12** - contains the definition of the entities within your organization that maintain trading relationships with external trading partners, based on the ANSI ASC X12 standard.

The EDIFACT, TRADACOMS, and X12 folders can also contain information about contact persons within these internal trading partner organizations. You may add other subfolders to organize internal trading partners into logical groupings by choosing **Folder Utilities** from the **Tools** menu.

External address book

Use the **External Address Book** to specify address information for partners outside your organization. The **External** folder includes these subfolders:

- **EDIFACT** - contains the definition of entities outside your organization with which your organization maintains relationships, based on the EDIFACT standard. These entities are your trading partners. You may add other subfolders to organize external trading partners into logical groupings.
- **TRADACOMS** - contains the definition of entities outside your organization with which your organization maintains relationships, based on the TRADACOMS UN/TDI Standard. These entities are your trading partners. You may add other subfolders to organize external trading partners into logical groupings.
- **X12** - contains the definition of entities outside your organization with which your organization maintains trading relationships, based on the ANSI ASC X12 standard. These are your trading partners. You may add other subfolders to organize external trading partners into logical groupings.

Internal trading partner and application partner

Select the **Internal** → **EDIFACT**, **TRADACOMS**, or **X12** folder in the **Address Book** navigator. A dialog box opens.

The **Internal Address Book** is displayed with two list boxes. The **Trading Partner** list contains an entry for each trading partner within your organization. Select a trading partner in the list and the **Application Partner** list shows each application partner of the trading partner.

Trading partners that exchange e-commerce information can be organized for this exchange in several ways. How each trading partner is organized determines the trading partner and application partners that are defined in Partner Manager. The following paragraphs describe certain scenarios.

Configuring internal and external address books

The **Trading Partner** list in the **Address Book** form shows existing trading partners. The **Address Book** form enables you to add, edit, delete, or copy this partner information. You can also access contact information for your trading partners. Add or edit trading partners to define the trading partner EDI information for your company at the corporate level.

The **Application Partner** list in the **Address Book** form shows the application partners for the selected trading partner. The **Address Book** form enables you to add, edit, or delete this partner information. You can also access contact information. Use the **Application Partner** area of the form to add the information for the departments or responsible parties for particular applications. This information is used to create or validate the EDI data envelopes for the trading partner. Define an application partner for each unique address or qualifier within a given trading partner.

Note: An identical dialog box appears when you select the **Internal** or **External** folders for **EDIFACT**, **TRADACOMS**, or **X12**. The following instructions apply to maintaining internal and external trading partner information. Differences between internal and external trading partners are identified.

Adding X12 internal trading partners

Use the following instructions to add an X12 Internal Trading Partner:

1. Select **Address Book** from the Partner Manager **File** menu.
2. Click **Internal** → **X12**.
The Address Book for Internal X12 window.
3. Click the **Add** button that is located to the right of the **Trading Partner** list box (upper panel).

The **Add X12 Trading/Application Partner In Internal Folder X12** window opens.

The window contains the tabs listed below. Refer to the following sections for a description of the fields displayed in each tab view:

- "Trading Partner Tab"
 - "ISA Options Tab"
 - "Application Partner Tab"
4. Complete all required fields, then complete any optional fields.

Note: The **Trading Partner Name** and **Interchange ID** field are required.

5. Click **Save**.

The window closes and the new Trading Partner is added to the listbox in the Address Book for Internal X12 window.

Trading Partner tab

The following fields are contained in the Add X12 Trading/Application Partner In Internal Folder X12 window, with the **Trading Partner** tab view displayed::

Trading Partner Name

Enter a name for this trading partner. This name appears in the **Trading Partner** list, **Trade** Links dialog box, **Traffic** reports, and so on. This name must be unique for each trading partner defined, even if they are in different folders.

ISA Address

Select the unique two-character qualifier that identifies the coding structure used to define the Interchange ID. This field corresponds to ANSI ASC X12 data element I05.

Interchange ID

Enter the unique identification code for this trading partner to be used to route incoming and outgoing data. If the data is outbound from the trading partner, this is the ISA Sender ID. For data inbound to the trading partner, this is the ISA Receiver ID. This field corresponds to ANSI ASC X12 data elements I06 and I07.

The combination of the ISA address and Interchange ID must be unique across any implemented system of maps.

ISA Options tab

The following fields are contained in the Add X12 Trading/Application Partner In Internal Folder X12 window, with the **ISA Options** tab view displayed:

Interchange Control Version ID

Select the version of the EDI standard that covers the interchange control segments. A default value of 00305 is provided. This field corresponds to ANSI ASC X12 data element I11.

You can add other versions using the **X12 Standards Maintenance** utility.

Interchange Standards ID or Repetition Character

This field takes on two meanings, depending upon the value selected in the Interchange Control Version ID field. If the value in the Interchange Control Version ID field is less than 00402, this field is called the Interchange Standards ID field. If the value is equal to, or greater than 00402, then it changes to become the Repetition Character field. Both field types are optional: the default value is "^" (caret Hex 5E) if the field denotes the Repetition Character; the default value is "U" for the Interchange Standards ID.

Note The dual meaning of this field resulted when the X12 committee stopped using the Interchange Standards ID and replaced it with the Repetition Character starting with Interchange Control version 00402.

Separators

Element - Select the delimiter used to separate data elements within a segment. A default value of * (asterisk) is provided.

Sub Element - Select the delimiter used to separate component data elements within a composite data structure. A default value of : (colon) is provided. The value of this separator must be different than that of the element separator and segment terminator. This field corresponds to ANSI ASC X12 data element I15.

Segment Terminator - Select the character used to terminate a segment. A default value of line feed is provided.

You can add other separators to these lists using the X12 Standards Maintenance utility.

The **Separators** delimiters provided as the **Element**, **Sub Element**, and **Segment Terminator** are used when generating outbound e-commerce data, including functional acknowledgements.

Application Partner tab

The following fields are contained in the Add X12 Trading/Application Partner In Internal Folder X12 window, with the **Application Partner** tab view displayed:

Application Partner Name

Enter a name for an application partner, such as a division, department or function within the trading partner. This name appears in the **Application Partner List**, **Trade** Links dialog box, **Traffic** reports, and so on. This name must be unique within a trading partner.

GS Address

Enter a code identifying the application partner, used to route data to and from it. If the data is outbound from the application partner, **GS Address** is the GS Sender ID. For data inbound to this application partner, **GS Address** is the GS Receiver ID. It corresponds to ANSI ASC X12 data elements 142 and 124. This address must be unique within a trading partner.

Alias Name

Enter an alias by which the application partner might be known, for instance an abbreviation of the application partner name, and so on. This alias is not used by Partner Manager or the Message Manager but is available for user application maps. Trading Manager validates this information to ensure that the alias name is unique.

See the Trading Manager Installation documentation for more information about these files and the **alias.mtt** type tree.

User Defined 1 User Defined 2

Enter any user-defined information for this application partner; for example, a department number, an internal customer number, and so on. Partner Manager or the Message Manager does not use this data but it is available for user application maps. See the *Trading Manager Installation and User Guide* for more information about these files and the **alias.mtt** type tree.

Adding X12 external trading partners

Use the following instructions to add an X12 Internal Trading Partner:

1. In the **Address Book** navigator, click **External** → **X12**.

The **Address Book** for External X12 opens.

2. Click the **Add** button that is located to the right of the **Trading Partner** list box (upper panel).

The **Add X12 Trading/Application Partner In External Folder X12** window opens.

The window contains the tabs listed below. Refer to the following sections for a description of the fields displayed in each tab view:

- "Trading Partner Tab - External X12"
- "ISA Options Tab"
- "TA1 Post Offices Tab"
- "Authorization/Security Tab"
- "Application Partner Tab"

3. Complete all required fields, then complete any optional fields.

Note: The **Trading Partner Name** and **Interchange ID** field are required.

4. Click **Save**.

The window closes and the new Trading Partner is added to the listbox in the Address Book for External X12 window.

Trading Partner tab - External X12

The following fields are contained in the Add X12 Trading Partner In External X12 window, **Trading Partner** tab view:

Trading Partner Name

Enter a name for this trading partner. This name appears in the **Trading Partner** list, **Trade** Links dialog box, **Traffic** reports, and so on. This name must be unique for each trading partner defined, even if they are in different folders.

ISA Address

Select the unique two-character qualifier that identifies the coding structure used to define the Interchange ID. This field corresponds to ANSI ASC X12 data element I05.

Interchange ID

Enter the unique identification code for this trading partner to be used to route data to and from it. If the data is outbound from the trading partner, this is the ISA Sender ID. For data inbound to this trading partner, this is the ISA Receiver ID. This field corresponds to ANSI ASC X12 data elements I06 and I07.

The combination of the ISA address and Interchange ID must be unique across any system of maps you implement.

Interchange

When checked, enables checking of duplicate interchange control numbers for this Trading Partner. If a duplicate interchange is found it is rejected.

Functional Group within an Interchange

When checked enables checking of duplicate Functional Group control numbers within the interchange for this partner. If a duplicate functional group is found it is then rejected.

Transaction within a Functional Group

When checked, enables checking of duplicate transaction control numbers within the functional group for this partner. If a duplicate transaction is found it is then rejected.

Last Interchange Control #

Resets the Interchange control number.

ISA Options tab

The fields in the Add X12 Trading Partner In External X12 window, **ISA Options** tab view are described in "ISA Options Tab" .

TA1 Post Offices tab

The following fields are contained in the Add X12 Trading Partner In External X12 window, **TA1 Post Offices** tab view::

Get Allows override of the TA1 Get Post Office that was set in Message Manager Configuration.

Put Allows override of the TA1 Put Post Office that was set in Message Manager Configuration.

Authorization/Security tab

The fields in the Add X12 Trading Partner In External X12 window, **Authorization/Security** tab view are described in the following table:

Authorization Qualifier (Inbound and Outbound)

Enter the two-character qualifier that identifies the coding structure used to define the inbound or outbound Authorization ID. The default value is 00, indicating no authorization information present. This field corresponds to ANSI/ASC/X12 data element I01.

Authorization ID (Inbound and Outbound)

Enter the inbound or outbound authorization information for this trading partner to be used for additional identification or authorization of data sent by this trading partner. By default, no authorization information is defined. This field corresponds to ANSI ASC X12 data element I02.

Security Qualifier (Inbound and Outbound)

Select the two-character qualifier that identifies the type of information in the Security ID. The default value is 00, indicating there is no security information present. This field corresponds to ANSI ASC X12 data element I03.

Password (Inbound and Outbound)

Enter a password if you selected **01** in the inbound or outbound **Security Qualifier** field.

Validate Authorization

Indicates whether or not ISA Authorization information is validated against the Partner Manager database.

Validate Security

Indicates whether or not security elements are validated against the Partner Manager database.

Application Partner tab

The following fields are contained in the Add X12 Trading Partner In External X12 window, **Application Partner** tab view:

Application Partner Name

Enter a name for an application partner, such as a division, department or

function within the trading partner. This name appears in the **Application Partner List**, **Trade** Links dialog box, **Traffic** reports, and so on. This name must be unique within a trading partner.

GS Address

Enter a code identifying the application partner, used to route data to and from it. If the data is outbound from the application partner, **GS Address** is the GS Sender ID. For data inbound to this application partner, **GS Address** is the GS Receiver ID. It corresponds to ANSI ASC X12 data elements 142 and 124. This address must be unique within a trading partner.

Alias Name

Enter an alias by which the application partner might be known, for instance an abbreviation of the application partner name, and so on. This alias is not used by Partner Manager or the Message Manager but is available for user application maps. Trading Manager validates this information to ensure that the alias name is unique.

See the *Trading Manager Installation and User Guide* for more information about these files and the **alias.mtt** type tree.

User Defined 1 User Defined 2

Enter any user-defined information for this application partner; for example, a department number, an internal customer number, and so on. Partner Manager or the Message Manager does not use this data but it is available for user application maps. See the *Trading Manager Installation and User Guide* for more information about these files and the **alias.mtt** type tree.

HIPAA Type 7 Institution

Allows selection of HIPAA Institution.

Adding Internal EDIFACT Trading Partners

Use the following instructions to add an internal EDIFACT Trading Partner:

1. In the **Address Book** navigator, click **Internal** → **EDIFACT**.

The **Address Book for Internal EDIFACT** opens.

2. Click the **Add** button that is located to the right of the **Trading Partner** list box (upper panel).

The **Add EDIFACT Trading/Application Partner In Internal Folder EDIFACT** window opens.

The window contains the tabs listed below. Refer to the following sections for a description of the fields displayed in each tab view:

- "Identification Tab"
- "Syntax/Separators Tab"
- "Application Partner Tab"

3. Complete all required fields, then complete any optional fields.

Note: The **Trading Partner Name** and **Interchange ID** field are required.

4. Click **Save**.

The window closes and the new Trading Partner is added to the listbox in the **Address Book for Internal EDIFACT** window.

Identification tab

The following fields are contained in the **Add EDIFACT Trading Partner In Internal EDIFACT** window, in the **Identification** tab view:

Trading Partner Name

Enter a name for this trading partner. This name appears in the **Trading Partner** list, **Trade** Links dialog box, **Traffic** reports, and so on. This name must be unique for each trading partner defined, even if they are in different folders.

Interchange ID

Enter the unique identification code for this trading partner to be used to route data to and from it. If the data is outbound from the trading partner, this is the Sender ID. For data inbound to this trading partner, this is the Receiver ID.

The combination of the Partner Code ID Qualifier and Interchange ID must be unique across any system of maps you implement.

Partner ID Code Qualifier

Select the unique two-character qualifier that identifies the coding structure used to define the Interchange ID.

Routing Address

Enter a code identifying the application partner, used to route data to and from it.

Comm Agreement ID

Enter a code identifying the commercial agreement ID.

Enveloping Option (these buttons only appear when you are adding internal partners)

Identify the format of the data that is provided by the application maps that is sent to this trading partner.

Partially Enveloped - the version type and other information have limited information and are to be completed by Trading Manager before routing the EDI data to the trading partner.

Fully Enveloped - The fully enveloped option is provided to support legacy translator support. It allows the user to use existing translators in order to preserve existing interface code, while using Trading Manager for communications and audit purposes.

Syntax/Separators tab

The following fields are contained in the **Add EDIFACT Trading Partner In Internal EDIFACT** window, in the **Syntax/Separators**:

Use UNA Segment

Check box if you use the UNA Segment for this Trading Partner.

Syntax ID

Select the Syntax ID used for this Trading Partner. Values are: **UNOA**; **UNOB**; **UNOC**; **UNOD**; **UNOE**; **UNOF**; **UNOG**; **UNOH**

Syntax Version

Enter a number greater than zero and less than 10 denoting the EDIFACT version syntax in use with this Trading Partner. The default is 1.

Component Data Element

Select the delimiter used to separate component data elements within a composite data structure. A default value of : (colon) is provided.

Data Element

Select a delimiter used to separate data elements within a segment.

Segment Terminator

Select the character used to terminate a segment. A default value of line feed is provided. You can add other separators to these lists using the Standards Maintenance utility.

Release Indicator

Select the character used to restore separator and terminator signs within the interchange. A default value of ? (question mark) is provided.

Decimal Notation

Select the character used for the decimal point within the interchange. A default value of , (comma) is provided.

Reserved Character

Spare character reserved for future use. A space is provided as the default.

Application Partner tab

The following fields are contained in the **Add EDIFACT Trading Partner In Internal EDIFACT** window, in the **Application Partner** tab view:

Field **Description**

Application Partner Name

[Optional] Enter a name for an application partner, such as a division, department or function within the trading partner. This name appears in the **Application Partner List**, **Trade Links** dialog box, **Traffic** reports, and so on. This name must be unique within a trading partner.

UNG Application ID

Enter a UNG segment header application ID identifying the application partner.

Application Partner ID Code Qualifier

[Optional] Identify the format of the data that is provided by the application maps that is sent to this trading partner.

Alias Name

[Optional] Enter an alias by which the application partner might be known. For example, an abbreviation of the application partner name, and so on. This alias is not used by Partner Manager or the Message Manager but is available for user application maps. Trading Manager validates this information to ensure that the alias name is unique.

User Defined 1 User Defined 2

[Optional] Enter any user-defined information for this application partner; for example, a department number, an internal customer number, and so on. Partner Manager or the Message Manager does not use this data but it is available for user application maps.

Adding External EDIFACT Trading Partners

Use the following instructions to add an external EDIFACT Trading Partner:

1. In the **Address Book** navigator, click **External** → **EDIFACT**.

The **Address Book for External EDIFACT** opens.

2. Click the **Add** button that is located to the right of the **Trading Partner** list box (upper panel).

The **Add EDIFACT Trading/Application Partner In External Folder EDIFACT** window opens.

The window contains the tabs listed below. Refer to the following sections for a description of the fields displayed in each tab view:

- "Identification Tab"
- "Syntax/Separators Tab"
- "Application Partner Tab"

3. Complete all required fields, then complete any optional fields.

Note: The **Trading Partner Name** and **Interchange ID** field are required.

4. Click **Save**.

The window closes and the new Trading Partner is added to the listbox in the **Address Book for External EDIFACT** window.

Identification tab

The following fields are contained in the **Add EDIFACT Trading/Application Partner In External Folder EDIFACT** window in the **Identification** tab view selected:

Trading Partner Name

Enter a name for this trading partner. This name appears in the **Trading Partner** list, **Trade Links** dialog box, **Traffic** reports, and so on. This name must be unique for each trading partner defined, even if they are in different folders.

Interchange ID

Enter the unique identification code for this trading partner to be used to route data to and from it. If the data is outbound from the trading partner, this is the Sender ID. For data inbound to this trading partner, this is the Receiver ID.

The combination of the Partner Code ID Qualifier and Interchange ID must be unique across any system of maps you implement.

Partner ID Code Qualifier

Select the unique two-character qualifier that identifies the coding structure used to define the Interchange ID.

Routing Address

Enter a code identifying the application partner, used to route data to and from it.

Comm Agreement ID

Enter a code identifying the commercial agreement ID.

Password

Allows you to enter a password for the Trading Partner.

Password Qualifier

Allows you to select a two character qualifier for the password.

Duplicate Control

Allows you to select either **None**, for no duplicate control, or **Interchange** in order to have duplicate control conducted at the Interchange level.

Last UNB Control #

Resets the last UNB Control number to a new value.

Syntax/Separators tab

The following fields are contained in the **Add X12 Trading/Application Partner In External Folder EDIFACT, Syntax/Separators** tab view:

Field Description

Use UNA Segment

Check box if you use the UNA Segment for this Trading Partner.

Syntax ID

Select the Syntax ID used for this Trading Partner. Values are: **UNOA; UNOB; UNOC; UNOD; UNOE; UNOF; UNOG; UNOH**

Syntax Version

Enter a number greater than zero and less than 10 denoting the EDIFACT version syntax in use with this Trading Partner. The default is 1.

Component Data Element

Select the delimiter used to separate component data elements within a composite data structure. A default value of : (colon) is provided.

Data Element

Select a delimiter used to separate data elements within a segment.

Segment Terminator

Select the character used to terminate a segment. A default value of line feed is provided. You can add other separators to these lists using the Standards Maintenance utility.

Release Indicator

Select the character used to restore separator and terminator signs within the interchange. A default value of ? (question mark) is provided.

Decimal Notation

Select the character used for the decimal point within the interchange. A default value of , (comma) is provided.

Reserved Character

Spare character reserved for future use. A space is provided as the default.

Application Partner tab

The following fields are contained in the **Add X12 Trading/Application Partner In External Folder EDIFACT, Application Partner** tab view:

Field Description

Application Partner Name

[Optional] Enter a name for an application partner, such as a division, department or function within the trading partner. This name appears in the **Application Partner List**, **Trade Links** dialog box, **Traffic** reports, and so on. This name must be unique within a trading partner.

UNG Application ID

Enter a UNG segment header application ID identifying the application partner.

Application Partner ID Code Qualifier

[Optional] Identify the format of the data that is provided by the application maps that is sent to this trading partner.

Alias Name

[Optional] Enter an alias by which the application partner might be known. For example, an abbreviation of the application partner name, and so on. This alias is not used by Partner Manager or the Message Manager but is available for user application maps. Trading Manager validates this information to ensure that the alias name is unique.

User Defined 1 User Defined 2

[Optional] Enter any user-defined information for this application partner; for example, a department number, an internal customer number, and so on. Partner Manager or the Message Manager does not use this data but it is available for user application maps.

Password

Allows you to enter a password for the Application Partner.

Adding Internal TRADACOMS Trading Partners

Use the following instructions to add an internal TRADACOMS Trading Partner:

1. In the **Address Book** navigator, click **Internal > TRADACOMS**.

The **Address Book for Internal TRADACOMS** opens.

2. Click the **Add** button that is located to the right of the **Trading Partner** list box (upper panel).

The **Add TRADACOMS Trading Partner In Internal Folder TRADACOMS** window opens.

The window contains the tabs listed below. Refer to the following sections for a description of the fields displayed in each tab view:

- "Trading Partner Tab"
- "Application Partner Tab"

3. Complete all required fields, then complete any optional fields.

Note: The **Trading Partner Name** and **Trading Partner ID** fields are required.

4. Click **Save**.

The window closes and the new Trading Partner is added to the listbox in the **Address Book for Internal TRADACOMS** window.

Trading Partner tab

The following fields are contained in the **Add X12 Trading Partner In Internal Folder TRADACOMS** window in the **Trading Partner** tab view:

Trading Partner Name

Enter a name for this trading partner. This name appears in the **Trading Partner** list, **Trade Links** dialog box, **Traffic** reports, and so on. This name must be unique for each trading partner defined, even if they are in different folders.

Trading Partner ID

Enter the unique identification code for this trading partner to be used to route data to and from it. If the data is outbound from the trading partner,

this is the Sender Reference or Name. For data inbound to this trading partner, this is the Receiver Reference or Sender Name.

Application Partner tab

The following fields are contained in the **Add X12 Trading Partner In Internal Folder TRADACOMS** window in the **Application Partner** tab:

Application Partner Name

Enter a name for an application partner, such as a division, department, or function within the trading partner. This name appears in the **Application Partner List**, **Trade Links** dialog box, **Traffic** reports, and so on. This name must be unique for each trading partner defined, even if they are in different folders.

Application Partner ID

Determined from the SDT (supplier ID composite) and CDT (customer ID composite).

Alias Name

Enter an alias by which the application partner might be known. For example, an abbreviation of the application partner name, and so on. This alias is not used by Partner Manager or the Message Manager but is available for user application maps. Trading Manager validates this information to ensure that the alias name is unique.

User Defined 1 User Defined 2

Enter any user-defined information for this application partner; for example, a department number, an internal customer number, and so on. Partner Manager or the Message Manager does not use this data but it is available for user application maps.

Adding External TRADACOMS Trading Partners

Use the following instructions to add an external TRADACOMS Trading Partner:

1. In the **Address Book** navigator, click **External > TRADACOMS**.
The **Address Book for External TRADACOMS** opens.
2. Click the **Add** button that is located to the right of the **Trading Partner** list box (upper panel).
The **Add TRADACOMS Trading Partner In External Folder TRADACOMS** window opens.
The window contains the tabs listed below. Refer to the following sections for a description of the fields displayed in each tab view:
 - "Trading Partner Tab"
 - "Application Partner Tab"
3. Complete all required fields, then complete any optional fields.
Note: The **Trading Partner Name** and **Trading Partner ID** field are required.
4. Click **Save**.
The window closes and the new Trading Partner is added to the listbox in the **Address Book for External TRADACOMS** window.

Trading Partner tab

The following fields are contained in the **Add TRADACOMS Trading Partner** In External Folder TRADACOMS window in the **Trading Partner** tab view:

Trading Partner Name

Enter a name for this trading partner. This name appears in the **Trading Partner** list, **Trade** Links dialog box, **Traffic** reports, and so on. This name must be unique for each trading partner defined, even if they are in different folders.

Trading Partner ID

Enter the unique identification code for this trading partner to be used to route data to and from it. If the data is outbound from the trading partner, this is the Sender Reference or Name. For data inbound to this trading partner, this is the Receiver Reference or Sender Name.

Duplicate Control

Allow duplicate control checking to be set to **None**, or to be set to **Interchange** when duplicate control checking is to be performed at the interchange level.

Editing a Trading Partner

The Edit Trading Partner window enables you to edit the EDIFACT, TRADACOMS, and X12 fields.

To edit a trading partner

1. In the **Address Book** navigator, click **Internal** > *folder* or **External** > *folder* to display the **Address Book** form, where *folder* is **EDIFACT**, **TRADACOMS**, or **X12**.
2. Select a trading partner from the **Trading Partner** list.
3. Click **Edit**.

Note: You can also double-click the trading partner name to display the Edit Trading Partner dialog box.

The Edit Trading Partner dialog box appears. A typical Edit Trading Partner window is shown below:

4. Edit any field for a trading partner.
5. Click **Save**.

Copying a Trading Partner

You can copy existing trading partner information to a new trading partner.

Enable the **Copy Application Partners** check box to copy associated application partners information to the new trading partner.

The following information is not copied:

- Application partner **Alias Name**; this record is unique to each application partner
- Contact information associated with the trading and application partners
- Trade links associated with the trading and application partners

To copy a trading partner

1. In the **Address Book** navigator, click **Internal** > *folder* or **External** > *folder* to display the **Address Book** form, where *folder* is **EDIFACT**, **TRADACOMS** or **X12**.
2. Select a trading partner from the **Trading Partner** list.
3. Click **copy**.
The **Copy Trading Partner** window opens.
4. Enter a new trading partner name in the Trading Partner Name field. The other required fields vary depending upon whether you are copying X12, EDIFACT or TRADACOMS.
 - For X12 - You must select the new ISA Address
 - For EDIFACT - You must change either the Interchange ID or the Routing Address
 - For TRADACOMS - You must change the Trading Partner ID
5. Change any information in the remaining fields, if required.
6. Enable the Copy Application Partners check box if you want the existing application partner information copied to the new trading partner.
7. Click **Save**.
The information is copied to a new trading partner and appears in the Address Book.

Deleting a Trading Partner

The following procedures describe how to delete a trading partner.

To delete a trading partner

1. In the **Address Book** navigator, click **Internal** > *folder* or **External** > *folder* to display the **Address Book** form, where *folder* is **EDIFACT**, **TRADACOMS**, or **X12**.
2. Select a trading partner from the **Trading Partner** list.
3. Click **Delete**.
The **Trading Partner Delete** form displays.

Note: This function may delete many records from the database and should be used with care. The **Trading Partner Delete** form displays the impact of this deletion, and after accepted, deletes all records associated with the Trading Partner.
4. Click **Delete** to confirm the removal of the records.
A confirmation appears that asks if it is okay to remove the Trading Partner.
5. Click **OK**.
A message box opens that tells you the delete was performed successfully.
6. Click **OK** to close the message box.
The Trading Partner has been successfully deleted and is removed from the Address Book.

Application partners

Application partners are associated with a particular trading partner or application, such as the Billing department. Application partners provide a means of grouping transactions by functional area within an organization.

You can add, edit, and delete application partners.

Application partners are managed in the Internal and External address book for the data type (EDIFACT, TRADACOMS, or X12).

For all application partner management, select the data type (EDIFACT, TRADACOMS, or X12) in the Internal or External address book.

Note: Application partners are required for X12 but are optional for EDIFACT and TRADACOMS.

Adding an X12 Application Partner

Use the following instructions to add an internal or external X12 Application Partner

1. In the **Address Book** navigator:
 - Click **Internal** → **X12** to add an Application Partner to an Internal Trading Partner.
 - Click **External** → **X12** to add an Application Partner to an Internal Trading Partner.
2. Select a Trading Partner in the **Trading Partner** list box (upper panel).
3. Click the **Add** button that is located to the right of the **Application Partner** list box (lower panel).

The **Add Internal Application Partner for Trading Partner** window opens.

4. Enter information in the fields of this window. See the next section, "Add X12 Application Partner Window Fields" for field descriptions.

Note: The **GS Address** must be unique within the associated trading partner.

Note: The **Application Partner Name** and **GS Address** fields are required.

5. Click **Save**.

The new application partner is added and appears in the Application Partner list in the Address Book.

Add X12 Application Partner Window fields

The following fields are contained in the X12 **Add Internal Application Partner for Trading Partner** window:

Application Partner Name

Enter a name for an application partner, such as a division, department or function within the trading partner. This name appears in the **Application Partner List**, **Trade Links** dialog box, **Traffic** reports, and so on. This name must be unique within a trading partner.

GS Address

Enter a code identifying the application partner, used to route data to and from it. If the data is outbound from the application partner, **GS Address** is the GS Sender ID. For data inbound to this application partner, **GS**

Address is the GS Receiver ID. It corresponds to ANSI ASC X12 data elements 142 and 124. This address must be unique within a trading partner.

Alias Name

Enter an alias by which the application partner might be known, for instance an abbreviation of the application partner name, and so on. This alias is not used by Partner Manager or the Message Manager but is available for user application maps. Trading Manager validates this information to ensure that the alias name is unique.

See the Trading Manager Installation documentation for more information about these files and the **alias.mtt** type tree.

User Defined 1 User Defined 2

Enter any user-defined information for this application partner; for example, a department number, an internal customer number, and so on. Partner Manager or the Message Manager does not use this data but it is available for user application maps. See the Trading Manager Installation documentation for more information about these files and the **alias.mtt** type tree.

HIPAA Type 7 Institution

Note: This field only appears when you are adding an Application Partner to an X12 External Trading Partner.

Allows you to select a type of Healthcare Institution to associate with the Application Partner (for example Medicare).

Adding an EDIFACT Application Partner

Use the following instructions to add an internal or external EDIFACT Application Partner

1. In the **Address Book** navigator:
 - Click **Internal** → **EDIFACT** to add an Application Partner to an Internal Trading Partner.
 - Click **External** → **EDIFACT** to add an Application Partner to an Internal Trading Partner.
2. Select a Trading Partner in the **Trading Partner** list box (upper panel).
3. Click the **Add** button that is located to the right of the **Application Partner** list box (lower panel).

The **Add Internal Application Partner for Trading Partner** window opens.
4. Enter information in the fields of this window. See the next section, "Add EDIFACT Application Partner Window Fields" for field descriptions.

Note: The **Application Partner Name** and **UNG Application ID** fields are required.

5. Click **Save**.

The new application partner is added and appears in the Application Partner list in the Address Book.

Add EDIFACT Application Partner window fields

The following fields are contained in the **Add Internal Application for Trading Partner EDIFACT** window in the **Application Partner** tab view:

Application Partner Name

Enter a name for an application partner, such as a division, department or function within the trading partner. This name appears in the **Application Partner List**, **Trade Links** dialog box, **Traffic** reports, and so on. This name must be unique within a trading partner.

UNG Application ID

Enter a UNG segment header application ID identifying the application partner.

Application Partner ID Code Qualifier

Identify the format of the data that is provided by the application maps that is sent to this trading partner.

Alias Name

Enter an alias by which the application partner might be known. For example, an abbreviation of the application partner name, and so on. This alias is not used by Partner Manager or the Message Manager but is available for user application maps. Trading Manager validates this information to ensure that the alias name is unique.

User Defined 1 User Defined 2

Enter any user-defined information for this application partner; for example, a department number, an internal customer number, and so on. Partner Manager or the Message Manager does not use this data but it is available for user application maps

Password (external EDIFACT only)

Note: This field appears only when you are adding an Application Partner to an external EDIFACT Trading Partner.

Allows you to enter a password for the Application Partner.

Adding TRADACOMS Application Partners

Use the following instructions to add an internal or external EDIFACT Application Partner

1. In the **Address Book** navigator:
 - Click **Internal** → **TRADACOMS** to add an Application Partner to an Internal Trading Partner.
 - Click **External** → **TRADACOMS** to add an Application Partner to an Internal Trading Partner.
 2. Select a Trading Partner in the **Trading Partner** list box (upper panel).
 3. Click the **Add** button that is located to the right of the **Application Partner** list box (lower panel).
- The Add Internal Application Partner for Trading Partner window opens.
4. Enter information in the fields of this window. See the next section, "Add TRADACOMS Application Partner Window Fields" for field descriptions.
 5. Click **Save**.

The new application partner is added and appears in the Application Partner list in the Address Book.

Add TRADACOMS Application Partner window fields

The following fields are contained in the **Add Internal Application for Trading Partner TRADACOMS** window in the **Application Partner** tab view:

Application Partner Name

Enter a name for an application partner, such as a division, department, or function within the trading partner. This name appears in the **Application Partner List**, **Trade Links** dialog box, **Traffic** reports, and so on. This name must be unique for each trading partner defined, even if they are in different folders.

Application Partner ID

Determined from the SDT (supplier ID composite) and CDT (customer ID composite).

Alias Name

Enter an alias by which the application partner might be known. For example, an abbreviation of the application partner name, and so on. This alias is not used by Partner Manager or the Message Manager but is available for user application maps. Trading Manager validates this information to ensure that the alias name is unique.

User Defined 1 User Defined 2

Enter any user-defined information for this application partner; for example, a department number, an internal customer number, and so on. Partner Manager or the Message Manager does not use this data but it is available for user application maps.

Editing an Application Partner

You can edit application partner definitions.

To edit an application partner

1. In the **Address Book** navigator, click **Internal** > *folder* or **External** > *folder* to display the **Address Book** form, where *folder* is **EDIFACT**, **TRADACOMS**, or **X12**.
2. Select a trading partner in the **Trading Partner** list to view the associated application partners.
3. Select an application partner in the **Application Partner** list.
4. Next to the **Application Partner** list, click the **Edit** button.
The Edit Application Partner dialog box appears.
5. Edit any field for the application partner.
6. Click **Save**.

Deleting an Application Partner

Note: Associated trade links must be deleted from the trading partner **Address Book** before the application partner can be deleted.

To delete an application partner

1. In the **Address Book** navigator, click **Internal** > *folder* or **External** > *folder* to display the **Address Book** form, where *folder* is **EDIFACT**, **TRADACOMS**, or **X12**.
2. Select a trading partner from the **Trading Partner** list.
3. Select the application partner from the **Application Partner** list.
4. Click **Delete** and confirm the delete action when prompted.

Managing Administrative Contacts

Use the **Address Book** to define contacts that are associated with a particular trading partner or particular application partner. You can also define administrative contacts that are not associated with a trading partner. Contact information is useful for defining the person to contact in your organization or your trading partner's organization about issues involving EDI traffic.

Contact information includes identifying individuals or groups of individuals and how to reach them. Providing contact information allows Trading Manager to send error notifications.

These contact types are not associated with a trading or application partner; therefore, the **Alert Options** are not available. Typically, they are people in your organization to contact.

You can add, edit, and delete administrative contacts in the **Admin** address book.

To add an administrative contact

1. In the **Address Book** navigator, select the **Internal** → **Admin** folder.
The **Contacts for Administration** dialog box appears, listing any defined administrative contacts.
2. Click **Add**.
The **Add a Contact** dialog box appears.
3. Enter the contact information.
4. Click **Save**.

To edit an administrative contact

1. In the **Address Book** navigator, click the **Internal** → **Admin** folder.
2. Select the contact from the **Contacts** list.
3. Click **Edit** in the **Contact List** dialog box. The **Edit a Contact** dialog box appears.
4. Edit the contact information.
5. When your contact information is complete, click **Save**.

To delete an administrative contact

1. In the **Address Book** navigator, click the **Internal Admin** folder.
2. Select the contact from the list.
3. Click **Delete**.
A message box opens that prompts you to confirm the delete.
4. Click **Yes**.
The contact is deleted.

Adding a Contact

Use the following procedures to define contacts that are associated with a particular trading partner or particular application partner. You can also define administrative contacts that are not associated with a trading partner.

This information is defined for your convenience and may be used to format e-mail message headers, compose letters using your default word processor, or route data to appropriate people when Alert conditions are detected.

To add a contact

1. In the **Address Book** navigator, click **Internal** > *folder* or **External** > *folder* to display the **Address Book** form, where *folder* is **EDIFACT**, **TRADACOMS**, or **X12**.
2. Select a partner from the **Trading Partner** list or **Application Partner** list.
3. Click **Contacts** in the area for the partner selected.
The **Contact List** appears, listing any contacts defined for the selected partner.
4. Click **Add** in the Contact List dialog box.
The **Add a Contact** dialog box appears.
5. Enter the contact information.
6. Select an alert option from the **Alert Options** group box. (This option is only available for contacts associated with internal trading/application partners).
7. Click **OK**.
8. Click **Save**.

E-Mail Check box and Field

If the alert is to be sent by e-mail, enable the **E-Mail** check box and specify the e-mail address to which the alert is to be sent. If you specified an e-mail address on the **Contact** dialog box, that information is automatically displayed in this field.

Monitor Directory Check box and Field

If the alert is to be sent to a directory location, enable **Monitor Directory**, as shown above, and specify the directory to which the alert is to be written.

Editing a Contact

Note: Alert Options are only available when editing information for a contact associated with an internal trading or application partner.

To edit a contact

1. In the **Address Book** navigator, click **Internal** > *folder* or **External** > *folder* to display the **Address Book** form, where *folder* is **EDIFACT**, **TRADACOMS**, or **X12**.
2. Select a partner from the **Trading Partner** list or **Application Partner** list.
3. Click **Contacts** in the area for the partner selected.
The trading or application partner **Contact** form appears, listing the contacts defined for the selected partner.
4. Select a contact in the contact list.
5. Click **Edit** in the Contacts dialog box.
The Edit Contact dialog box appears.
6. Edit the contact information including **Alert Options**.
7. Click **Save**.

Deleting a Contact

Use the following procedure to delete a contact for a trading or application partner.

To delete a contact

1. In the **Address Book** navigator, click **Internal** > *folder* or **External** > *folder* to display the **Address Book** form, where *folder* is **EDIFACT**, **TRADACOMS**, or **X12**.
2. Select a partner from the **Trading Partner** list or **Application Partner** list.
3. Click **Contacts** in the area for the partner selected.
The trading or application partner **Contacts** form appears, listing the contacts defined for the selected partner.
4. Select the contact from the **Contacts** list.

Click **Delete** and confirm the delete action when prompted

Chapter 4. Post Offices

Use the **Post Offices** navigator to define and maintain the routing instructions for inbound and outbound data for Trading Manager. The **Post Offices** navigator is used to define post offices that represent sources and destinations for data flowing to and from Trading Manager.

Overview

This chapter describes the **Post Offices** navigator and provides instructions for creating and modifying post office information.

Procedures described in this chapter enable you to define:

- Where data from trading partner relationships is transferred
- How data is transferred to and from Trading Manager

A **Get** post office is the source for data that is processed by the Message Manager. A **Put** post office is the destination for data from the Message Manager.

- A **Get** post office is always used to pick up data coming into the Message Manager
- A **Put** post office is always used to drop off data coming out of the Message Manager

File Post Offices

Use a File Post Office when data is transferred to or from local directory structures. Configuring a file route post office requires only that you identify a local directory where e-commerce data is **Get** or **Put** without specifying how the file is physically transferred.

- **Get Post Offices** - The Message Manager is configured to execute automatically based on new files created or existing files changed in the directory defined for the File Post Office. This creation or change is known as a file event.
- **Put Post Offices** - The data resulting from Message Manager processing is written to files in the directory defined for the File Post Office.

E-Mail post offices

Use an E-mail Post Office when the source of or destination for e-commerce data is an e-mail message using a MAPI, cc:Mail, Lotus Notes, or Internet mail system. When you define an e-mail post office, Trading Manager uses the e-mail adapter to route mail into or out of the Message Manager. For more information about the E-mail adapter, see the E-mail Adapter documentation.

- **Get Post Offices** - Message Manager is configured to execute at particular time intervals to retrieve any available data from the mail system data using the e-mail adapters and the settings defined for the e-mail post office.
- **Put Post Offices** - The data resulting from Message Manager processing is routed using the e-mail adapters and the settings defined for the e-mail post office.

FTP Post Offices

Use File Transfer Protocol (FTP) Post Offices to get and put files in remote directories using the Internet's FTP communications support. Trading Manager uses the FTP adapter to route files using FTP. For more information about the FTP adapter, see the FTP Adapter documentation.

- **Get Post Offices** - The Message Manager is configured to execute at particular time intervals to retrieve any available data from the remote directories using the FTP adapters and the settings defined for the FTP post office
- **Put Post Offices** - The data resulting from Message Manager processing is routed to the remote location using the FTP adapters and the settings defined for the FTP post office.

VAN post offices

Use VAN Post Offices to send and receive mail asynchronously through a commercial Value Added Network (VAN). VAN adapters must be used to send or receive mail from a Value Added Network by using a scripted session. For more information about the VAN adapter, see the VAN Adapter documentation.

- **Get Post Offices** - The Message Manager is configured to execute at particular time intervals to retrieve any available data from the VAN using the VAN adapters and the settings defined for the VAN post office
- **Put Post Offices** - The data resulting from Message Manager processing is routed to the remote VAN using the VAN adapters and the settings defined for the VAN post office.

HTTP post offices

Use HTTP Post Offices when e-commerce data is being transferred to and from an HTTP(S) web server. If you have a Command Server, a Launcher, or Platform API on one platform, you can use the HTTP adapter to transfer data to an HTTP(S) web server on another platform. For more information about the HTTP adapter, see the HTTP Adapter documentation.

JMS post offices

Use JMS Post Offices when e-commerce data is being transferred to a Java Messaging Service (JMS) compliant system provider. JMS is part of the Java 2 Platform Enterprise Edition (J2EE) standards and defines a standard API for accessing enterprise-messaging systems. Trading Manager uses the Java Message Service Adapter to transfer data to and from JMS systems. For more information about the JMS adapter, see the Java Message Service Adapter documentation.

MessageQ client post offices

Use MessageQ Client Post Offices when BEA MessageQ adapters are used to perform message transformation in the MessageQ environment, including the translation of data between different formats. The BEA MessageQ adapters also control the flow of messages between MessageQ applications. For more information about the BEA MessageQ adapter, see the BEA MessageQ Adapter documentation.

MessageQ server post offices

Use Message Q Server Post Offices when BEA MessageQ adapters are used to perform message transformation in the MessageQ environment, including the translation of data between different formats. The BEA MessageQ adapters also

control the flow of messages between MessageQ applications. For more information about the BEA MessageQ adapter, see the BEA MessageQ Adapter documentation.

MQSeries client post offices

Use MQSeries Client Post Offices when transferring e-commerce data between applications using IBM WebSphere applications. IBM WebSphere MQ can move data in heterogeneous computer networks, allowing systems of dissimilar computers to move data to and from each other. The IBM WebSphere MQ client adapter controls the data. For more information about the IBM WebSphere MQ Adapter, see the IBM WebSphere MQ Adapter documentation.

MQSeries server post offices

Use MQ Series Server Post Offices when transferring e-commerce data between applications using IBM WebSphere applications. IBM WebSphere MQ can move data in heterogeneous computer networks, allowing systems of dissimilar computers to move data to and from each other. The IBM WebSphere MQ client adapter controls the data. For more information about the IBM WebSphere MQ Adapter, see the IBM WebSphere MQ Adapter documentation.

MSMQ post offices

Use MSMQ Post Offices when transferring e-commerce data to and from Microsoft Message Queue (MSMQ) servers. For more information about the MSMQ Adapter see the MSMQ Adapter documentation.

OracleAQ post offices

Use OracleAQ Post Offices when e-commerce data is being transferred to and from an Oracle database. See the OracleAQ Adapter documentation.

Viewing Post Offices

When you select a post office view from the **Post Offices** navigator, you can add, copy, edit, and delete post offices of that type.

To view all post offices

1. Open Partner Manager.
2. From the **File** menu, select **Post Offices**.
The **Post Offices** navigator opens.
3. Click **All Post Offices** in the navigator.
The All Post Offices dialog box appears with both **Get** and **Put** post offices displayed.
4. View **Get** or **Put** post offices only by clicking the associated option button in **Post Office Type**.

To view specific post offices

Select one of the post office types displayed in the navigator.

For example, when you select **E-Mail** from the navigator, a list showing only the e-mail post offices opens.

Adding Post Offices

The following steps describe how to add a post office.

Note: The following instructions are not applicable to File and VAN post offices. If you are adding a File post office, see "Adding a File Post Office" . For VAN post offices see the "Adding a VAN Post Office" .

To add post offices

1. Select one of the post office types displayed in the navigator.
The list of post offices for that adapter is displayed.
2. Click **Add**.
The **Add Post Office** dialog box appears.
3. Enter the following information:

Name Name for the post office; for example, **X12 Data For Processing**.

The name displays in the Post Offices list and in the drop-down list boxes when maintaining trade links.

Nickname

A three-character nickname. A valid, unique nickname is automatically generated based on the **Name** entry. You may use this nickname or assign one of your own. The nickname is used to identify this post office throughout the Trading Manager system.

Adapter Type

Select an adapter type.

Get/Put Indicator

Select the post office type option.

Adapter Command String

Enter an adapter command string; for example:

```
-PR MAPI -U mzipper -P srhwec9 -TO pbure -RCPT
```

4. Click **Save**.
The new post office appears in the **Post Offices** list.

Adding a File Post Office

To add a file post office

1. Click **File** in the **Post Offices** navigator.
The File Post Offices dialog opens.
2. Click **Add**.
The Add Post Office dialog box opens.
3. Select **File** from the **Adapter Type** drop-down menu.
4. The Add Post Office dialog box for **File** adapters opens.
Enter information in this dialog box as described in the following table.

Field Information to Enter or Select

Name Name of the file route post office; for example, **X12 Data For Processing**.

The name displays in the **Post Offices** list and in the **Get** File Post Office and **Put** File Post Office lists in the **Trade Links** navigator.

Nickname

A three-character nickname. A valid, unique nickname is automatically generated based on the **Name** entry. You may use this nickname or assign one of your own. The nickname is used to identify this post office throughout the Trading Manager system.

Get/Put Indicator

Select the post office type option.

Directory

Enter the path of the directory or folder where files for the file post office are located. Specify a path relative to the directory where the Launcher is installed.

It is recommended that you use the default directory (*install_dir\tmgr_n.n\mmgr\file*) for all **Get** file post offices to simplify Message Manager configuration and processing, instead of creating different physical directories for each file route post office.

For **Put** file post offices, however, you may specify different physical directories.

5. Click **Save**.

The new post office appears in the **Post Offices** list.

Copying Post Offices

You can copy post offices.

To copy a post office

1. From the **File** menu, select **Post Offices**.
The list of all post offices appears.
2. Select a post office from the **Post Offices** list.
3. Click **Copy**. The Copy Post Office dialog box appears.
4. Specify a new **Name** and **Nickname** for the copy of the existing post office.
5. Edit the other File post office settings as needed.
6. Click **Save**.

The additional post office appears in the **Post Offices** list.

Editing Post Offices

You can edit post offices.

To edit a post office

1. Select one of the Post Office types displayed in the navigator.
The list of Post Offices for that adapter is displayed.
2. Select a post office from the list.
3. Click **Edit**.

The Edit Post Office dialog box opens.

Note: When editing the File Post Office, be aware that changing the nickname may cause a conflict with associated trade links. Also, if you change the physical directory, you need to verify that all files have been moved to the new directory.

4. Specify a new **Name** and **Nickname** for the copy of the existing post office.
5. Edit the other File post office settings as needed.
6. Click **Save**.

The additional post office appears in the **Post Offices list**.

Deleting Post Offices

Note: You cannot delete a post office that is associated with any trade links. You must change the post office for each affected trade link prior to deleting the post office.

To delete a post office

1. Select one of the Post Office types displayed in the navigator.
The list of Post Offices for that adapter is displayed.
2. Select the post office that you want to delete from the list.
3. Click **Delete** and confirm the delete action when prompted.
The post office is removed from the **Post Offices list**.

VAN Post Offices Overview

This section describes how to configure the VAN adapter as well as how to specify options for the Monitor file, as well as how to add, copy, edit, and delete VAN Post Offices.

Supported VAN Types

The following is a list of supported VAN types:

• Advantis (IBM)	• Kleinschmidt
• Advantis (Sears)	• EDINet
• AT&T	• Sprint
• Commerce	• Transsettlements
• Compuserve	• User-defined networks
• GE Information Systems (GEIS)	•

Adding a VAN Post Office

For more information about the VAN adapter, see the VAN Adapter documentation.

To add a VAN post office

1. Select **VAN** from the list of Post Office types displayed in the navigator.
The VAN Post Offices dialog box opens with all Post Offices associated with the VAN adapter displayed.

2. Click **Add**.
The **Add Post Office** form appears.
3. Select **VAN** from the **Adapter Type** drop-down menu.
The Add Post Office dialog box for the **VAN** adapter type opens.
4. Enter information in this dialog box as described in the following table.

VAN Post Office Field	Information to Enter or Select
Name	Name for the post office; for example, X12 Data For Processing . The name displays in the Post Office list and in the Get Mail Post Office and Put Mail Post Office drop-down list box in the Trade Links navigator.
Nickname	A three-character nickname. Partner Manager automatically generates a valid, unique nickname based on the Name entry. You may use this nickname or assign one of your own. The nickname is used to identify this post office throughout the Trading Manager system.
Adapter Type	Select the VAN adapter type.
Get/Put Indicator	Enable the option button for Get Post Office or Put Post Office .
Adapter Command String	The command string specified in the VAN configuration setting automatically displays here.

5. At this point you can either save the Post Office without configuring it, or configure the Post Office before you save it.
 - To save the Post Office without configuring it, click the **Save** button. A confirmation box will open which will ask you to confirm your save. Click **OK** to close this box and add the Post Office to the scroll list in the VAN Post Offices dialog box.
 - If you want to configure the Post Office, see the next section *Configuring a VAN Post Office*.

Configuring a VAN Post Office

These steps describe how to configure a VAN Post Office.

To configure a VAN Post Office

1. Add a VAN Post Office and complete all fields as described in "Adding a VAN Post Office" .
2. Click **Configure**.
The **VAN Source Configuration** dialog box appears.

Note: All VANs include the **VAN Name**, **Phone**, **User ID**, **Password**, and **Script** fields; some VANs have additional fields to configure.
3. Select the **VAN Name**.
Each supported VAN destination is configured according to VAN requirements. After you select the **VAN Name** from the drop-down list, the configuration dialog box and required fields are customized for each VAN.
4. Enter a numeric **Phone** number for the modem to dial to connect to the VAN.

The numeric phone number cannot contain any spaces, dashes, or parentheses.

5. Enter the **User ID** for the specific VAN account.
6. Enter the **Password** associated with the **User ID**.
7. Enter the **Script** file name or click **Browse** to navigate your file system and select the **Script** file.

The script file contains all the commands and responses to send to the VAN to satisfy the logon requirements of the specific network. You may want to add your own script, create it, and save the file with a **.job** file name extension.

Scripts used as sources for input map cards have a ***_g.job** designation (indicating a **GET**). Scripts used as targets (destinations) for output map cards have a ***_p.job** designation (indicating a **PUT**).

8. Click **OK**.

The VAN adapter command string is built from the information in the VAN Source Configuration dialog box and appears in the **Adapter Command String** field.

9. Click **Save**.

The new VAN Post Office appears in the **Post Offices** list.

VAN source configuration

In addition to defining VAN source information, you can define configuration files, trace file creation, and monitor options.

Click a tab on the VAN Source Configuration dialog box to define:

- **Options** to specify a configuration file other than the default **aplus.cfg**. Leave this field blank.
- **Trace** to specify a trace file name and append option for a trace file containing diagnostic information.
- **Diagnostics** to specify a modem monitor file and overwrite options.

Specifying Options for the Monitor File

You can specify options for the monitor file that override the default settings. The monitor file name is based on the prefix of the associated data file and the **.mon** file extension.

To specify the options for the monitor file

1. Add a VAN Post Office as described in "Adding a VAN Post Office" and click the **Configure** button.
2. Complete all required fields in **Connection** tab on the VAN Source Connection dialog box as described in "VAN Source Configuration" .
3. Select the **Diagnostics** tab.
4. Select a **Monitor Mode**:

NONE

No monitor file is produced.

APPEND

Information is added to the existing monitor file each time the adapter is run.

OVERWRITE

Any existing monitor file is overwritten each time the adapter is run.

5. Click **OK**.
6. Click **Save**.

Other VAN source configuration options

Two other tabs on the VAN Source Configuration dialog box allow you to set the following options:

- **Options** - allows you to specify a configuration file other than the default **aplus.cfg**. Leave this field blank.
- **Trace** - allows you to specify a trace file name and append option for a trace file containing diagnostic information.

Chapter 5. Trade links

Trade links contain the partner addresses, post offices used, standards information, control and tracking information, and current test or production status for each individual document that you exchange with that partner.

Trade Links Overview

Use the **Trade Links** navigator to define and maintain trading relationships. The **Trade Links** navigator enables you to coordinate the trading partners, post offices, and additional information to define a trading relationship. The navigator contains **Inbound** and **Outbound** trade links.

This chapter describes how to use the **Trade Links** navigator to define EDIFACT, TRADACOMS, and X12 trade links.

Establishing trade links

Establishing trade links is automated by two wizards that guide you through the process, to ensure that the resulting link provides a logical connection. The **Trade Link Add Wizard** helps you define the trade link in the database. The **EDI Wizard** is used for X12 and EDIFACT trade links. This wizard operates on messages that you define, to produce the correct type tree for the correct version and release of the standard for the Message Manager. The **EDI Wizard** produces two copies of the e-commerce type tree: one tree used by the Message Manager and another tree that is available for your use in application maps.

Inbound trade links

Inbound indicates that your company (also known as an internal trading partner) is receiving data from another entity (also known as an external trading partner). A basic inbound trade link consists of the following information:

- The external trading partner from which you receive the data.
- Which internal trading partner receives the data.
- Where Trading Manager gets its data (Get post office) and puts its data (Put post office).
- What type(s) of information the two trading partners are exchanging.

This section describes:

- "X12 Inbound Trade Links"
- "EDIFACT Inbound Trade Links"
- "TRADACOMS Inbound Trade Links"

X12 Inbound Trade Links

The section describes how to add, edit, copy, and delete X12 Inbound Trade Links:

- To add X12 Inbound Trade Links see "Adding an X12 Inbound Trade Link"
- To edit X12 Inbound Trade Links see "Editing an X12 Inbound Trade Link"
- To copy X12 Trade Links see page "Copying an X12 Inbound Trade Link"
- To delete X12 Trade Links see page "Deleting an X12 Inbound Trade Link"

Adding an X12 Inbound Trade Link

An inbound trade link is defined as one in which your (external) partner is sending data to you (the internal partner). You are the receiver of the incoming data.

To add an X12 inbound trade link

1. From the **File** menu, select **Trade Links**.
The **Trade Links** navigator appears.
2. Click **Inbound > X12** in the **Trade Links** navigator.
The X12 Inbound Trade Links window opens.
3. Click **Add Link**.
The **X12 Inbound Trade Links Add Wizard** opens.
4. Follow the on-screen instructions in the Wizard to add an X12 Trade Link.
5. When you click **Finish** to complete adding an inbound trade link using the Wizard, the X12 Trade Link: Add Application window opens.
6. Select a version and functional ID.
7. Click **OK**.
You are returned to the X12 Inbound Trade Links window.
8. Select either the **Test** or **Production** check box to activate the associated **Test Post Office** or **Production Post Office** field.
9. Select a post office from the drop-down menu on the selected field.

Note: The **Test Post Office** field, and the **Production Post Office** field are mandatory depending upon which Test/Production check boxes are enabled. One of these fields must be completed before you can save the Trade Link.

10. If you want to make changes to any of the fields in the window related to acknowledgements and validation, click the **Acknowledgements/Validate By** tab to display those fields.
11. If you are adding a HIPAA X12 document, click the **HIPAA Validation Types** tab to display the HIPAA fields.

Note: In the preceding screen, it should be noted that the fields in the **HIPAA Validation Types** area are active only when a HIPAA Version and a Functional ID Code other than FA is selected. These fields display when the **HIPAA Validation Types** tab is selected. These fields are described in "Editing a HIPAA X12 Document" .

12. Click **Save**.
The Trade Link is saved.

Editing an X12 Inbound Trade Link

The following instructions describe how to edit existing trade links.

To edit an inbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Inbound > X12**.
3. Find the desired trade link by using the search buttons at the top of the window. See "Searching for an X12 Trade Link" for additional search information.

After making your selection, the Search dialog closes and you are returned to the X12 Inbound Trade Links window.

4. Make your changes.
5. Click **Save**.

A message box opens that informs you that your updates have been made.

6. Click **OK**.

The Trade Link is updated.

Copying an X12 Inbound Trade Link

The following instructions describe how to copy existing trade links.

To copy an inbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Inbound** → **X12**.
The **X12 Inbound** Trade Links window opens.
3. Click the **Copy** button in the trading partner area of the window. The Copy X12 Inbound Trade Link window opens.
4. Click **Find All** in the **New `From` Trading Partner** area to open the X12 Partner Lookup window, or click **Search** for a more refined search.
5. Highlight a trading partner and click **Select**.
6. Click **Find All** in the **New `To` Trading Partner** area, or click **Search** for a more refined search.
7. Highlight a partner and click **Select**.
8. Click **Begin Copy**.
9. If the link being copied has no acknowledgement partners, a message box opens that informs you that the copy was successful.
10. If the selected link contains an acknowledgement partner, the Select Acknowledgement Partner dialog opens.
You have the following options:
 - **Set to Same as `From` Partner** - you can use the same Acknowledgement partner as the new From partner
 - **Select a New Acknowledgement Partner** - you select a different Acknowledgement partner; the Partner Lookup dialog box appears if you click this button
 - **Set This Application to `No Acknowledgement`** - you can set the application so that it has no acknowledgement
11. Make your selection and click **OK**.
A message box opens that informs you that the copy was successful.
12. Click **OK** to close the message box.
The Trade Link is copied.

Deleting an X12 Inbound Trade Link

The following instructions describe how to delete existing trade links.

Note: Deleting a link deletes all applications and transactions associated with the trade link. The delete operation cannot be reversed.

To delete an X12 inbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Inbound** and **X12**.
3. Find the trade link that you want to delete by using the search buttons at the top of the window. See "Searching for an X12 Trade Link" for additional search information.
4. Highlight a link.
5. Click **Select**.
6. Click **Delete**.
The **Trade Link Confirmation** message box opens to ask if you really want to delete the trade link.
7. Click **Yes** to delete the trade link, including all applications and transaction sets associated with it.
A message box opens that informs you that the trade link was successfully deleted.
8. Click **OK** to close the message box.

EDIFACT Inbound Trade Links

The section describes how to add, edit, copy, and delete EDIFACT Inbound Trade Links.

Adding an EDIFACT Inbound Trade Link

An inbound trade link is defined as one in which your (external) partner is sending data to you (the internal partner). You are the receiver of the incoming data. To add an EDIFACT inbound trade link, you use the **Link Wizard**.

To add an EDIFACT Inbound Trade Link

1. From the **File** menu, select **Trade Links**.
The **Trade Links** navigator opens.
2. Click **Inbound > EDIFACT** in the **Trade Links** navigator.
The EDIFACT Inbound Trade Links window opens.
3. Click **Add Link**.
The **EDIFACT Inbound Trade Links Add Wizard** opens.
4. Follow the on-screen instruction in the Wizard to add an EDIFACT Trade Link.
If the EDIFACT trading partners have an application partner, you will be allowed to define whether a UNG should be absent, required, or optional, the default no longer being NO UNG.
5. When you click **Finish** to complete adding an inbound trade link using the Wizard, the EDIFACT Trade Link: Add Application window opens.
6. Add applications defining the message types you receive from the external trading partner.
7. The **Version/Message Type** group box includes the four components of the EDIFACT version that you defined for the EDIFACT Standard Version.
 - Click **Find Version/Message Types** to select an existing EDIFACT version, or
 - Select the components from the **Version/Message Type** lists that define the version or message type.
8. Click **OK**. The EDIFACT Inbound Trade Links window is displayed with the newly added trade link displayed.
9. Click **Save**.
The EDIFACT Trading Partner is added.

Editing an EDIFACT Inbound Trade Link

The following instructions describe how to edit existing EDIFACT inbound trade links.

To edit an EDIFACT inbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Inbound** and select **EDIFACT**.
3. Find the desired trade link by using the search buttons at the top of the window. See "Searching for an EDIFACT Trade Link" for additional search information.

After you have selected the trading partner that you want to edit, it appears in the EDIFACT Inbound Trade Links window.

4. Make your changes.
5. Click **Save**.
A message box opens that informs you that your updates have been made.
6. Click **OK**.

The Trade Link is updated.

Copying an EDIFACT Inbound Trade Link

The following instructions describe how to copy existing trade links.

To copy an inbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Inbound > EDIFACT**.
3. Click the **Copy** button in the trading partner area of the window. The Copy EDIFACT Inbound Trade Link window opens.
4. Click **Find All** in the **New `From` Trading Partner** area to open the EDIFACT Partner Lookup window, or click **Search** for a more refined search.
5. Highlight a trading partner and click **Select**.
6. Click **Find All** in the **New `To` Trading Partner** area, or click **Search** for a more refined search.
7. Highlight a partner and click **Select**.
8. Click **Begin Copy**.

A message box will open to inform you that your copy was successful.

9. Click **OK**.

The EDIFACT Trading Partner is copied.

Deleting an EDIFACT Inbound Trade Link

The following instructions describe how to delete existing trade links.

Note: Deleting a link deletes all applications and transactions associated with the trade link. The delete operation cannot be reversed.

To delete an EDIFACT inbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, select **Inbound > EDIFACT**.

The EDIFACT Inbound Trade Link window opens.

3. Find the trade link to be deleted by using the search buttons at the top of the window. See "Searching for an EDIFACT Trade Link" for additional search information.
After you select the link, the search window closes and you are returned to the EDIFACT Inbound Trade Link window with the selected link displayed.
4. Click **Delete**.
The **Trade Link Confirmation** message box opens to ask if you really want to delete the trade link.
5. Click **Yes** to delete the trade link, including all applications and transaction sets associated with it.
A message box opens that informs you that the trade link was successfully deleted.
6. Click **OK** to close the message box.

TRADACOMS Inbound Trade Links

The section describes how to add, edit, copy, and delete TRADACOMS Inbound Trade Links:

- To add a TRADACOMS Inbound Trade Links, see "Adding a TRADACOMS Inbound Trade Link" .
- To edit a TRADACOMS Inbound Trade Links, see "Editing TRADACOMS Inbound Trade Links" .
- To copy a TRADACOMS Inbound Trade Links, see "Editing TRADACOMS Inbound Trade Links" .
- To delete a TRADACOMS Inbound Trade Links, see "Deleting TRADACOMS Inbound Trade Links" .

Adding a TRADACOMS Inbound Trade Link

An inbound trade link is defined as one in which your (external) partner is sending data to you (the internal partner). You are the receiver of the incoming data. The procedure uses the **Link Wizard**.

Note: Because application partners are optional in TRADACOMS, if SDT/CDT segments are expected, select the trading partner that also has an application partner associated with it.

To add a TRADACOMS inbound trade link

1. From the **File** menu, select **Trade Links**.
The **Trade Links** navigator opens.
2. Click **Inbound > TRADACOMS** in the **Trade Links** navigator.
The TRADACOMS Inbound Trade Links window opens.
3. Click **Add Link**.
The **TRADACOMS Inbound Trade Links Add Wizard** opens.
4. Follow the on-screen instruction in the Wizard to add a TRADACOMS Trade Link.
5. When you click **Finish** to complete adding an inbound trade link using the Wizard, the TRADACOMS Trade Link: Add Application window opens.
6. Select a Document Type by selecting a type from the **Document Type** field drop-down menu.
You can access a list of all TRADACOMS document types by clicking the **Find** button.

7. Click **OK**.

The TRADACOMS Trade Link: Add Application window closes and you are returned to the TRADACOMS Inbound Trade Links window with the Application tab displayed.

8. Select a Get Post Office using the **Get Post Office** field drop-down menu.

Note: The **Get Post Office** field is mandatory and must be entered before the Trade Link can be saved.

9. Select a Put Post Office.

If the **Test** check box is enabled, you must enter a Post Office in the **Test Put Post Office** field

If the **Production** check box is enabled, you must enter a Post Office in the **Production Put Post Office** field.

Note: The **Get Post Office** and **Production Put Post Office** fields are mandatory depending upon which Test/Production check boxes are enabled. One of these fields must be completed before you can save the Trade Link.

10. If you want to make changes to customer or supplier details, click the **SDT/CDT & VAT** tab.

11. Click **Save**.

The **Trade Link Saved** message box opens to inform you that the trade link is saved.

12. Click **OK**.

The message box closes and the Trade Link is saved.

Editing TRADACOMS Inbound Trade Links

The following instructions describe how to edit existing EDIFACT inbound trade links.

To edit a TRADACOMS inbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Inbound >TRADACOMS**.
3. Find the trade link to be edited by using the search buttons at the top of the window. See "Searching for a TRADACOMS Trade Link" for additional search information.

After you have selected the trading partner that you want to edit, it appears in the TRADACOMS Inbound Trade Links window.

4. Make your changes.
5. Click **Save**.

A message box opens that informs you that your updates have been made.

6. Click **OK**.

The Trade Link is updated.

Copying TRADACOMS Inbound Trade Links

The following instructions describe how to copy existing trade links.

To copy a TRADACOMS inbound trade link

1. From the **File** menu, select **Trade Links**.

2. In the **Trade Links** navigator, expand **Inbound > TRADACOMS**.
The TRADACOMS Inbound Trade Link window opens.
3. Click the **Copy** button in the trading partner area of the window.
The Copy TRADACOMS Inbound Trade Link window opens.
4. Click **Find All** in the **New `From` Trading Partner** area to open the TRADACOMS Partner Lookup window, or click **Search** for a more refined search
5. Highlight a trading partner and click **Select**.
6. Click **Find All** in the **New `To` Trading Partner** area, or click **Search** for a more refined search).
7. Highlight a partner and click **Select**.
8. Click **Begin Copy**.
A message box will open to inform you that your copy was successful.
9. Click **OK**.
The TRADACOMS Trade Link is copied.

Deleting TRADACOMS Inbound Trade Links

The following instructions describe how to delete existing trade links.

Note: Deleting a link deletes all applications and transactions associated with the trade link. The delete operation cannot be reversed.

To delete a TRADACOMS inbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, select **Inbound > TRADACOMS**.
3. Find the desired trade link by using the search buttons at the top of the window. See "Searching for a TRADACOMS Trade Link" for additional search information.
After you have selected the trade link to be deleted, the search window closes and you are returned to the TRADACOMS Inbound Trade Link window with the selected trade link displayed.
4. Click **Delete**.
The **Trade Link Confirmation** message box opens to ask if you really want to delete the trade link.
5. Click **Yes** to delete the trade link, including all applications and transaction sets associated with it.
A message box opens that informs you that the trade link was successfully deleted.
6. Click **OK** to close the message box.

Inbound trade link applications

One or more business documents are exchanged between an internal and external trading partner, with each business document defined as an application within the trading relationship. The initial applications are added when you run the **Inbound Trade Links Wizard**. You can add more applications for a given external and internal trading partner from the Inbound Trade Links: Partner View dialog box.

X12 Inbound Trade Link Applications

Refer to the following procedures to add, edit, and delete X12 Inbound Trade Link Applications.

Adding an X12 Inbound Trade Link Application

One or more business documents are exchanged between an internal and external trading partner, with each business document defined as an application within the trading relationship.

The initial applications are added when you run the **Inbound Trade Links Wizard**. You can add more applications for a given external and internal trading partner from the Inbound Trade Links: Partner View dialog box.

Use the following instructions to add a new X12 application for a trade link.

To add a new X12 inbound trade link application

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Inbound > X12**.
The X12 Inbound Trade Links window opens.
3. Click the **Applications** tab.
The Applications tab view opens.
4. Click **Add Application**.
The X12 Trade Link: Add Application window opens.
5. Select a Version and Functional ID then click **OK**.
6. Specify the data state to be exchanged. At least one of the two check boxes must be checked
 - Enable **Test**, if exchanging test data
 - Enable **Production**, if exchanging production data
7. If you enabled the **Test** or **Production** indicators, choose the **Put Post Office** where the application-ready EDI data received in Test or Production mode is placed.
8. If desired you can click the **Acknowledgements/Validate By** tab and enter any information. Refer to the X12 Functional Acknowledgement table following these procedures for a description of the X12 FAs.
9. If you are adding a HIPAA Inbound Trade Link Application, click the **HIPAA Validation Types** tab and set the fields as desired. Refer to "Editing a HIPAA X12 Document" for more information.
10. If you do not want to perform data validation, but you want to route the data, check the **Route Only; No Validation** check box.
11. Click **Save**.
The X12 Inbound Trade Links window displays the new trade link application in the list.

Levels of X12 Functional Acknowledgement (FA):

The following are levels of X12 functional acknowledgements:

No Acknowledgement

No FA is sent

Functional Group Level

An FA is sent acknowledging receipt of the functional group, providing details of the inbound data to only the functional group (AK1) level.

Transaction Set Level

An FA is sent acknowledging receipt of the functional group, providing details of the inbound data to the transaction set (AK2) level.

Segment Level

An FA is sent acknowledging receipt of the functional group, providing details of the inbound data to the segment (AK3) level.

Data Element Level

An FA is sent acknowledging receipt of the functional group, providing details of the inbound data to the data element (AK4) level.

If you select an FA to be sent, specify the receiving external trading partner. By default, functional acknowledgements are sent to the X12 external trading partner in the trade link.

To send acknowledgements to an address other than the external trading partner

1. In the X12 Inbound Trade Link window Application tab view
2. Click the **Find Ack To** button
3. The X12 Partner Lookup in Folder window opens.
4. Enter search criteria in the window, then click **Execute** to display partners.
5. Click **Select** to close the Lookup window.

The X12 Inbound Trade Links window displays the new application.

Editing an X12 Inbound Trade Link Application

To edit an inbound X12 inbound trade link application

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Inbound > X12**.
The X12 Inbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Make changes to any of the fields in **Post Offices/Routing**; **Acknowledgements/Validate By**; and **HIPAA Validation Types** (HIPAA users only) tab views.
6. When the information is complete, click **Save**.
The **Trade Link Saved** message box will open to tell you that your changes have been saved.
7. Click **OK** to close the message box.

The following are **Validate By** group box options:

Interchange

If the transaction is bad, the whole interchange will be removed.

Message

EDIFACT only. If a transaction is bad, only that transaction will be removed. All remaining good data will be processed.

Transaction

X12 only. If a transaction is bad, only that transaction will be removed. All remaining good data will be processed.

Functional Group

If a transaction is bad, the functional group that contained the bad transaction will be removed and the remaining good data will be processed.

Editing a HIPAA X12 document

The selections that you make in the **HIPAA Validation Types** area of the Edit X12 Inbound Trade Link window are used by Message Manager to determine the validation level of incoming HIPAA data.

Note: These fields are enabled *only* when the Inbound Group is for a HIPAA Version with a Functional ID code other than FA. Additionally, to enable these drop-down menus, at least one Structure Validation record must be imported, or manually added for levels 1 and 2 and at least one HIPAA Type Qualifiers Import (**hipaa_x12_4010_qualifier.dat**), or maintenance must be performed for levels 3; 4; 6; and 7, with one exception. In this exception, type 5 will be enabled if type 2, 3, or 4 is enabled and a HIPAA Type Qualifiers Import was run. For details related to the HIPAA Type Qualifiers Import, see the Chapter 3 of the *Trading Manager Installation and User Guide*.

You may select one of the following values for these fields:

- Type 1: **Disabled; Enabled; or Reported in 997**
- Type 2: **Disabled; Enabled; Enabled, Reported in 997; or Enabled, Reported in 999**
- Type 3: **Disabled; Enabled; Enabled; Reported in 824; Enabled; Reported in 999; or Enabled, Execute Map**

Note: If **Enabled, Execute Map** is specified in Type 3, the Type 3 Map field must contain a value.

- Type 4: **Disabled; Enabled; Enabled, Reported in 824; Enabled, Reported in 999**
- Type 5: **Disabled; Enabled; Enabled, Reported in 997; Enabled, Reported in 999**
- Type 6: **Disabled; Enabled; Enabled, Reported in 824; Enabled, Reported in 999**
- Type 7: **Disabled; Enabled; Enabled, Reported in 824; Enabled, Reported in 999**

You can only specify Type 7 if the External Application Partner for this link has a "HIPAA Institution" set.

If any 824 reporting was selected, a box will be enabled to allow you to specify the version for the 824 transaction. The default version is 4050, but it can be changed to a value in the drop down list (currently versions 4050 and 4010 are available).

For tradelinks for HIPAA version V4050X151 and functional ID "PI", if a type 4 824 or 999 report was selected, another check box in the HIPAA validation window is enabled to allow you to define how to perform validation for the BIN segments that might be present in those transactions. The default value is to perform no validation (Value=NEVER), but you can also specify the values "X" to perform only format validation, or "S" to perform validation against a Schema for both version and content. It is important in the last two cases to have the required schema file located in the same directory as the Message Manager maps.

Deleting an X12 Inbound Trade Link Application

The following instructions describe how to delete an existing X12 trade link application.

To delete an X12 inbound trade link application

1. From the **File** menu, choose **Trade Links**.
2. In the **Trade Links** navigator select **Inbound > X12**.
The X12 Inbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Click the **Delete Application** button.
The **Trade Links Application Removal Confirmation** box opens. The box tells you that you must **Save** after closing the box to complete removal.
6. Click **OK**.
The message box closes.
7. Click **Save**.
The trade link application is deleted.

EDIFACT Inbound Trade Link Applications

Refer to the following procedures to add, edit and delete EDIFACT Inbound Trade Link Applications

Adding an EDIFACT Inbound Trade Link Application

One or more business documents are exchanged between an internal and external trading partner, with each business document defined as an application within the trading relationship.

The initial applications are added when you run the **Inbound Trade Links Wizard**. You can add more applications for a given external and internal trading partner from the Inbound Trade Links: Partner View dialog box.

Use the following instructions to add a new EDIFACT application for a trade link.

To add a new EDIFACT inbound trade link application

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Inbound > EDIFACT**.
The EDIFACT Inbound Trade Links window opens.
3. Click the **Applications** tab.
4. Click the **Add Application** button.
The EDIFACT Trade Link: Add Application window opens. If the No UNG option is set, the two fields in the **Application Partners** area will be grayed out.
5. If this is an optional or mandatory UNG link, and an UNG segment is expected for this application, select the Application Partners associated with this UNG segment in the drop-down list.
6. Complete the **Msg Version No**, **Msg Release No**, and **Controlling Agency** fields.
7. Click the **Find Version Message Types** button to open the **Find All EDIFACT Functional ID Message Types** list box and select a message type from the list.

8. Click **OK**.
9. With the **Post Offices** tab displayed select test or production data by enabling one or both **Test** and/or **Production** check boxes.
10. Select a Test Post Office and/or Production Post Office. You must select a test or production Post Office in order to save the trade link application.
11. If data is not to be validated, but is to be routed to the Post Office, enable the **Route Only; No Validation** check box.
12. If validation is desired, click the **Acknowledgements/Validate By** tab and make changes to any fields in this view.
13. Click **Save**.
The new Inbound Trade Link Application is now created.

Levels of EDIFACT Acknowledgement (CONTRL):

The following list identifies the levels of EDIFACT functional acknowledgements. Please note that CONTRL, as used in this section, is *not* a typographical error.

Acknowledgement	Description
No Acknowledgement	No CONTRL is sent
Interchange Level	A CONTRL is sent acknowledging receipt, providing details of the inbound data to only the interchange (UCI) level.
Functional Group Level	This option is only available if this is a UNG level document, that is, application partners are specified. A CONTRL is sent acknowledging receipt, providing details of the inbound data to only the functional group (UCF) level.
Message Level	A CONTRL is sent acknowledging receipt, providing details of the inbound data to the message (UCM) level.
Segment Level	A CONTRL is sent acknowledging receipt, providing details of the inbound data to the segment (UCS) level.
Data Element Level	A CONTRL is sent acknowledging receipt, providing details of the inbound data to the data element (UCD) level.

Editing an EDIFACT Inbound Trade Link Application

To edit an inbound EDIFACT trade link application

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Inbound > EDIFACT**.
The EDIFACT Inbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Make changes to any of the fields in **Post Offices/Routing**; **Acknowledgements/Validate By**; and **Application Partners** tab views.
6. When the information is complete, click **Save**.
The **Trade Link Saved** message box will open to tell you that your changes have been saved.
7. Click **OK** to close the message box.

Deleting an EDIFACT Inbound Trade Link Application

The following instructions describe how to delete an existing EDIFACT trade link application.

To delete an EDIFACT inbound trade link application

1. From the **File** menu, choose **Trade Links**.
2. In the **Trade Links** navigator select **Inbound > EDIFACT**.
The EDIFACT Inbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Click the **Delete Application** button.
The **Trade Links Application Removal Confirmation** box opens. The box tells you that you must **Save** after closing the box to complete removal.
6. Click **OK**.
The message box closes.
7. Click **Save**.
The trade link application is deleted.

TRADACOMS Inbound Trade Link Applications

Refer to the following procedures to add, edit, and delete TRADACOMS Inbound Trade Link Applications.

Adding a TRADACOMS Inbound Trade Link Application

One or more business documents are exchanged between an internal and external trading partner, with each business document defined as an application within the trading relationship.

The initial applications are added when you run the **Inbound Trade Links Wizard**. You can add more applications for a given external and internal trading partner from the Inbound Trade Links: Partner View dialog box.

Use the following instructions to add a new EDIFACT application for a trade link.

To add a new TRADACOMS inbound trade link application

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Inbound > TRADACOMS**.
The TRADACOMS Inbound Trade Links window opens.
3. Click the **Application** tab.
4. Click the **Add Application** button.
The TRADACOMS Trade Link: Add Application window opens.
5. Select a document type from the **Document Type** field.
6. Click **OK**.
7. Add data as desired in the fields in the **SDT/CDT & VAT** tab view
8. With the **Post Offices** tab displayed, select test or production data by enabling one or both **Test** and/or **Production** check boxes.
9. Select a **Test Post Office** and/or **Production Post Office**.
10. Click **Save**.

Editing a TRADACOMS Inbound Trade Link Application

To edit an inbound TRADACOMS trade link application

1. From the **File** menu, select **Trade Links**.
2. In the Trade Links navigator select **Inbound** → **TRADACOMS**.
The EDIFACT Inbound Trade Links window opens
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Make changes to any of the fields in **Post Offices** and **SDT/CDT & VAT** tab views.
6. When the information is complete, click **Save**.
7. The **Trade Link Saved** message box will open to tell you that your changes have been saved.
8. Click **OK** to close the message box.

Deleting a TRADACOMS Inbound Trade Link Application

The following instructions describe how to delete an existing TRADACOMS trade link application.

To delete a TRADACOMS inbound trade link application

1. From the **File** menu, choose **Trade Links**.
2. In the **Trade Links** navigator select **Inbound** > **TRADACOMS**.
The EDIFACT Inbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Click the **Delete Application** button.
The **Trade Links Application Removal Confirmation** box opens. The box tells you that you must **Save** after closing the box to complete removal.
6. Click **OK**.
The message box closes.
7. Click **Save**.
The trade link application is deleted.

Outbound trade links

When you define **Outbound Trade Links**, outbound indicates that your company (also known as an internal trading partner) is sending data to another entity (also known as an external trading partner). A basic outbound trade link consists of the following information:

- Which internal trading partner is sending the data
- Which external trading partner is receiving the data
- Where Trading Manager gets its data (Get post office) and puts its data (Put post office)
- What type(s) of information the two trading partners are exchanging

X12 Outbound Trade Links

X12 Outbound Trade Links can be added, edited, copied, and deleted.

Adding an X12 Outbound Trade Link

To add an X12 outbound trade link requires the following steps:

- Select the external and internal trading partners with associated application partners.
- Select the **Get** and **Put** post offices:
- The **Get** post office is where Message Manager retrieves the EDI data.
- The **Put** post office provides the routing instructions for the EDI data produced by Message Manager (or how Message Manager sends the data).
- Select the interchange control (ISA) and functional group (GS) numbering schemes.
- Add applications defining the message types you receive from the external trading partner.

To select external and internal X12 trading partners

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Outbound** → **X12**.
3. Click **Add Link**.

The **Add an X12 Outbound Link Wizard** opens.

4. Follow the on-screen instructions in the Wizard to add an X12 Trade Link.
5. When you click **Finish** to complete adding an inbound trade link using the Wizard, the X12 Trade Link: Add Application window opens.
6. Select a version and functional ID for the application partner.
7. Click **OK**.

You are returned to the X12 Inbound Trade Links window.

8. Select a version and functional ID.
9. Click **OK**.

You are returned to the X12 Inbound Trade Links window. The Application tab view is displayed. The Application information that you entered is listed in the scroll box.

10. If you want to add another application, click the **Add Application** button.
11. Perform steps 8 and 9.
12. When you are finished adding applications, select a Production Post Office from the drop-down menu on the **Production Post Office** field.

Note: The **Put Post Office** field is mandatory. You must select a Put Post Office before you can save the Trade Link.

13. In the X12 Outbound Trade Links window, click the **Application** tab, and then click the **Format, GS/ST Control** tab.

This tab view contains the **Application Format** options and the **GS Time Stamp Options**.

You can choose one of the following Application Format enveloping options by selecting the associated button:

- **Fully Enveloped** - This option indicates that the data passed to Trading Manager for outbound processing is already fully enveloped with terminators/delimiters, ISA envelope information, and Control numbers. Trading Manager makes no updates, leaving this enveloping information as is.

- **Control Number Enveloped** - This option indicates that terminator/delimiter enveloping is set in the data, but Trading Manager should generate a proper control number at the Interchange, Functional Group, and Transaction level.
- **Partially Enveloped** - Trading Manager envelopes data with terminators/delimiters as specified in Partner Manager, and generates a proper control number at the Interchange level, Functional Group level, and Transaction level. ISA control fields are also set based on information in Partner Manager.

You can change the **GS Time Stamp Option** by selecting one of the following buttons: **HHMM**; **HHMMSS**; **HHMMSSD**; **HHMMSSDD**.

Time is expressed in 24-hour clock time as follows: HHMM, or HHMMSS, or HHMMSSD, or HHMMSSDD, where H = hours (00-23), M = minutes (00-59), S = integer seconds (00-59) and DD = decimal seconds; decimal seconds are expressed as follows: D = tenths (0-9) and DD = hundredths (00-99)

14. You can select the **Format** tab view and the **Transactions** tab view and modify any of the default settings of fields in these tab views.
15. Select the **Identification**, **GS Control**, **ISA Control** and **Applications** tab and make any desired changes to any of the fields.
16. Click **Save**.

Editing an X12 Outbound Trade Link

The following instructions describe how to edit existing X12 Outbound trade links.

To edit an X12 outbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Outbound** and **X12**.
3. Find the desired trade link by using the search buttons at the top of the window. See "Searching for an X12 Trade Link" for additional search information.

After making your selection, the search window closes and you are returned to the X12 Outbound Trade Links window.

4. Make any desired changes to the fields in the Edit windows, and click **Save** when you are finished.

You are returned to the X12 Outbound Trade Links window.

5. Click any of the tab views in this window to modify any fields.
6. When you are satisfied that all of your changes have been made, click **Save**. The **Trade Link Saved** message box opens to inform you that your changes were successfully saved.

7. Click **OK**.

8. The message box closes and the edit is complete

Copying an X12 Outbound Trade Link

The following instructions explain how to copy an X12 outbound trade link.

To copy an X12 Outbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, select **Outbound** > **X12**.

3. Click **Copy Link** in the trading partner area of the window. The Copy X12 Outbound Trade Link dialog box appears.
4. Click **Find All** in the **New `From` Trading Partner** area (or click **Advanced Find** for a more refined search).
5. Highlight a partner and click **Select**.
6. Click **Find All** in the **New `To` Trading Partner** area (or click **Advanced Find** for a more refined search).
7. Highlight a partner and click **Select**.
8. Click **Begin Copy**.
9. Click **OK** to confirm.

The changes to the trade link appear in the **X12 Outbound Trade Links** window.

Deleting an X12 Outbound Trade Link

Note: Deleting a link deletes all partner relationships, applications, and transactions associated with the trade link. The delete operation cannot be reversed.

To delete an X12 outbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, select **Outbound > X12**.
The X12 Outbound Trade Links window opens.
3. Find the trade link to be deleted by using the search buttons at the top of the window. See "Searching for an X12 Trade Link" for additional search information.
After making your selection, the search window closes and you are returned to the X12 Outbound Trade Links window.
4. Click **Delete**.
5. When the confirmation dialog box appears, click **Yes** to delete the trade link, including all applications and transaction sets associated with it.

EDIFACT Outbound Trade Links

EDIFACT Outbound Trade Links can be added, edited, copied, and deleted.

Adding an EDIFACT Outbound Trade Link

Refer to the following procedures to add an EDIFACT Outbound Trade Link

To add an EDIFACT outbound trade link

1. From the **File** menu, select **Trade Links**.
The **Trade Links** navigator opens.
2. Click **Outbound > EDIFACT** in the **Trade Links** navigator.
The EDIFACT Outbound Trade Links window opens.
3. Click **Add Link**.
The **EDIFACT Outbound Trade Links Add Wizard** opens.
4. Follow the on-screen instruction in the Wizard to add an EDIFACT Trade Link.
5. When you click **Finish** to complete adding an inbound trade link using the Wizard, the EDIFACT Trade Link: Add Application window opens.

6. Add applications defining the message types you receive from the external trading partner.
7. The **Version/Message Type** group box includes the four components of the EDIFACT version that you defined for the EDIFACT Standard Version.
 - Click **Find Version/Message Types** to select an existing EDIFACT version, or
 - Select the components from the **Version/Message Type** lists that define the version or message type.
8. Click **OK**.
The EDIFACT Outbound Trade Links window is displayed with the newly added trade link displayed.
9. In the **Post Offices** tab view, select the **Test** or **Production** check box. You can also select both.
10. Select a **Test Put Post Office** and/or a **Production Put Post Office** (depending upon which check boxes that you selected in the **Test/Production Indicators** area.
11. If validation is not desired, enable the **Route Only; no Validation** check box.
12. Click **Save**.
The EDIFACT Trading Partner is added.

Editing an EDIFACT Outbound Trade Link

The following instructions describe how to edit an existing EDIFACT outbound trade link.

To edit an EDIFACT inbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Outbound** and select **EDIFACT**.
3. Click the **Edit From TP** button.
The Edit EDIFACT Trading Partner window opens.
4. Make changes to the fields in this window as desired.
5. Select the **Syntax/Separators** tab and make any desired changes.
6. Click **Save**.
The Edit EDIFACT window closes and you are returned to the EDIFACT Inbound Trade Links window.
7. Click the **Edit To TP** button.
The Edit EDIFACT Trading Partner in Internal folder EDIFACT window opens.
8. Make changes to the fields in this window as desired.
9. Select the **Syntax/Separators** tab and make any desired changes.
10. Click **Save**.
The Edit EDIFACT window closes and you are returned to the EDIFACT Outbound Trade Links window.
11. Click **Save**.
A message box opens that informs you that your updates have been made.
12. Click **OK**.
The EDIFACT Trade Link is updated.

Copying an EDIFACT Trade Link

The following instructions describe how to copy existing trade links.

To copy an EDIFACT outbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Outbound > EDIFACT**.
3. Find the desired trade link by using the search buttons at the top of the window. See "Searching for an EDIFACT Trade Link" for additional search information. Highlight a link and click **Select**.
4. Click the **Copy** button in the trading partner area of the window. The Copy EDIFACT Outbound Trade Link window opens.
5. Click **Find All** in the **New `From` Trading Partner** area to open the EDIFACT Partner Lookup window, or click **Search** for a more refined search
6. Highlight a trading partner and click **Select**.
7. Click **Find All** in the **New `To` Trading Partner** area, or click **Search** for a more refined search).
8. Highlight a partner and click **Select**.
9. Click **Begin Copy**.
A message box will open to inform you that your copy was successful.
10. Click **OK**.
The EDIFACT Trading Partner is copied.

Deleting an EDIFACT Outbound Trade Link

The following instructions describe how to delete existing trade links.

Note: Deleting a link deletes all applications and transactions associated with the trade link. The delete operation cannot be reversed.

To delete an EDIFACT outbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, select **Outbound > EDIFACT**.
3. Find the desired trade link by using the search buttons at the top of the window. See "Searching for an EDIFACT Trade Link" for additional search information. Highlight a link and click **Select**.
The selected trade link is displayed in the EDIFACT Outbound Trade Links window.
4. Click **Delete**.
The **Trade Link Confirmation** message box opens to ask if you really want to delete the trade link.
5. Click **Yes** to delete the trade link, including all applications and transaction sets associated with it.
A message box opens that informs you that the trade link was successfully deleted.
6. Click **OK** to close the message box.

Adding a TRADACOMS Outbound Trade Link

An inbound trade link is defined as one in which your (external) partner is sending data to you (the internal partner). You are the receiver of the incoming data. The procedure uses the **Link Wizard**.

Note: Because application partners are optional in TRADACOMS, if SDT/CDT segments are expected, select the trading partner that also has an application partner associated with it.

To add a TRADACOMS outbound trade link

1. From the **File** menu, select **Trade Links**.

The **Trade Links** navigator opens.

2. Click **Inbound > TRADACOMS** in the **Trade Links** navigator.

3. Click **Add Link**.

The **TRADACOMS Outbound Trade Links Add Wizard** opens.

4. Follow the on-screen instruction in the Wizard to add a TRADACOMS Trade Link.

5. When you click **Finish** to complete adding an inbound trade link using the Wizard, the TRADACOMS Trade Link: Add Application window opens.

6. Select a Document Type by selecting a type from the **Document Type** field drop-down menu.

You can access a list of all TRADACOMS document types by clicking the **Find** button.

7. Click **OK**.

The TRADACOMS Trade Link: Add Application window closes and you are returned to the TRADACOMS Inbound Trade Links window with the Application tab displayed.

8. Select a Get Post Office using the **Get Post Office** field drop-down menu.

Note: The **Get Post Office** field is mandatory and must be entered before the Trade Link can be saved.

9. Select a Put Post Office.

If the **Test** check box is enabled, you must enter a Post Office in the **Test Put Post Office** field

If the **Production** check box is enabled, you must enter a Post Office in the **Production Put Post Office** field.

Note: The **Get Post Office** and **Production Put Post Office** fields are mandatory depending upon which Test/Production check boxes are enabled. One of these fields must be completed before you can save the Trade Link.

10. If you want to make changes to customer or supplier details, click the **SDT/CDT & VAT** tab.

11. Click **Save**.

The **Trade Link Saved** message box opens to inform you that the trade link is saved.

12. Click **OK**.

The message box closes and the Trade Link is saved.

Editing TRADACOMS Outbound Trade Links

The following instructions describe how to edit existing EDIFACT inbound trade links.

To edit a TRADACOMS outbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Outbound** and select **TRADACOMS**.
3. Find the desired trade link by using the search buttons at the top of the window. See "Searching for a TRADACOMS Trade Link" for additional search information. Highlight a link and click **Select**.

After you have selected the trading partner that you want to edit, it appears in the TRADACOMS Inbound Trade Links window.

4. Click the **Edit From TP** button to edit "From" Trading Partner fields, or click the **Edit From AP** button to edit "From" Application Partner fields.

The **Edit TRADACOMS Trading Partner** window opens.

5. Make changes to the fields in this window as desired.
6. When your changes are complete, click **Save**.

You are returned to the TRADACOMS Inbound Trade Links window.

7. Click the **Edit To TP** button to edit "To" Trading Partner fields, or click the **Edit To AP** button to edit "To" Application Partner fields.

8. Make any desired changes to the fields in these window(s) and save your changes.

9. From the TRADACOMS Inbound Trade Links window, click the Applications tab and make any desired changes to the Get Post Office, Test Post Office, and/or Production Post Office by selecting the Edit button located to the right of each field.

10. Select the **STD/CDT & VAT** tab and make any desired changes.

11. When your edits are complete, click **Save**.

12. A message box opens that informs you that your updates have been made.

13. Click **OK**.

The TRADACOMS Trade Link is updated.

Copying TRADACOMS Outbound Trade Links

The following instructions describe how to copy existing trade links.

To copy a TRADACOMS outbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, expand **Outbound > TRADACOMS**.
3. Find the desired trade link by using the search buttons at the top of the window. See "Searching for a TRADACOMS Trade Link" for additional search information.

After you select a link it is displayed in the TRADACOMS Outbound Trade Links window.

4. Click the **Copy** button in the trading partner area of the window. The Copy TRADACOMS Outbound Trade Link window opens.

5. Click **Find All** in the **New 'From' Trading Partner** area to open the TRADACOMS Partner Lookup window, or click **Search** for a more refined search

6. Highlight a trading partner and click **Select**.
7. Click **Find All** in the **New `To' Trading Partner** area, or click **Search** for a more refined search).
8. Highlight a partner and click **Select**.
9. Click **Begin Copy**.
A message box will open to inform you that your copy was successful.
10. Click **OK**.
The TRADACOMS Trade Link is copied.

Deleting TRADACOMS Trade Links

The following instructions describe how to delete existing trade links.

Note: Deleting a link deletes all applications and transactions associated with the trade link. The delete operation cannot be reversed.

To delete a TRADACOMS outbound trade link

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator, select **Inbound** or **Outbound > TRADACOMS**.
3. Find the desired trade link by using the search buttons at the top of the window. See "Searching for a TRADACOMS Trade Link" for additional search information. Highlight a link and click **Select**.
You are returned to the TRADACOMS Outbound Trade Links window with the link that you selected displayed.
4. Click **Delete**.
The **Trade Link Confirmation** message box opens to ask if you really want to delete the trade link.
5. Click **Yes** to delete the trade link, including all applications and transaction sets associated with it.
A message box opens that informs you that the trade link was successfully deleted.
6. Click **OK** to close the message box.

Adding an X12 Outbound Trade Links Application

To add a new outbound X12 trade link application

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Outbound > X12**.
The X12 Outbound Trade Links window opens.
3. Click the **Applications** tab.
The Applications tab view opens.
4. Click **Add Application**.
The X12 Trade Link: Add Application window opens.
5. Select a Put Post Office.
6. Add details about the Application by selecting the **Format, GS/ST Control** tab and the **Transactions** tab views.
7. Click **Save**.
The **Trade Link Saved** message box opens.
8. Click **OK** to close the message box.

The X12 Outbound Trade Link Application is saved.

Editing an X12 Outbound Trade Link Application

To edit an X12 outbound trade link application

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Outbound > X12**.
The X12 Outbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Make changes to any of the fields in **PO/Validation/Ack; Format GS; and Transactions** tab views.
6. When the information is complete, click **Save**.
The **Trade Link Saved** message box will open to tell you that your changes have been saved.
7. Click **OK** to close the message box.

Deleting an X12 Outbound Trade Link Application

To delete an X12 outbound trade link application

1. From the **File** menu, choose **Trade Links**.
2. In the **Trade Links** navigator select **Outbound > X12**.
The X12 Outbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Click the **Delete Application** button.
The **Trade Links Application Removal Confirmation** box opens. The box tells you that you must **Save** after closing the box to complete removal.
6. Click **OK**.
The message box closes.
7. Click **Save**.
The trade link application is deleted.

EDIFACT Outbound Trade Links Applications

You can add, edit, and delete EDIFACT Outbound Trade Link Applications.

Adding an EDIFACT Outbound Trade Links Application

Use the following instructions to add an EDIFACT Outbound Trade Links Application.

To add an EDIFACT outbound trade links application

From the **File** menu, select **Trade Links**.

1. In the **Trade Links** navigator select **Outbound > EDIFACT**.
The EDIFACT Outbound Trade Links window opens.
2. Click the **Applications** tab.
3. Click the **Add Application** button.

The EDIFACT Trade Link: Add Application window opens. If the No UNG option is set, the two fields in the **Application Partners** area will be grayed out.

4. If this is an optional or mandatory UNG link, and an UNG segment is expected for this application, select the Application Partners associated with this UNG segment in the drop-down list.
5. Complete the **Msg Version No**, **Msg Release No**, and **Controlling Agency** fields.
6. Click the **Find Version Message Types** button to open the **Find All EDIFACT Functional ID Message Types** list box and select a message type from the list.
7. Click **OK**.
8. With the Post Offices tab displayed, select test or production data by enabling one or both **Test** and/or **Production** check boxes.
9. Select a Test Post Office and/or Production Post Office. You must select a test or production Post Office in order to save the trade link application.
10. Click the **Msg Control No/Version Info** and **Application Partners** tab and make any changes to any fields in these views.

The Acknowledgements are set in the **Ack Level** field. See "Levels of EDIFACT Acknowledgement (CONTRL)" .

11. Click **Save**.

The new Outbound Trade Link Application is now created.

Editing an EDIFACT Outbound Trade Link Application

To edit an inbound EDIFACT outbound trade link application

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Outbound > EDIFACT**.
The EDIFACT Outbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Make changes to any of the fields in **Msg Control No/Version Info**, **Post Offices** and **Application Partners** tab views.
6. When your updates are complete click **Save**.

The **Trade Link Saved** message box will open to tell you that your changes have been saved.

7. Click **OK** to close the message box.

Deleting an EDIFACT Outbound Trade Link Application

To delete an EDIFACT outbound trade link application

1. From the **File** menu, choose **Trade Links**.
2. In the **Trade Links** navigator select **Inbound > EDIFACT**.
The EDIFACT Inbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Click the **Delete Application** button.

The **Trade Links Application Removal Confirmation** box opens. The box tells you that you must **Save** after closing the box to complete removal.

6. Click **OK**.

The message box closes.

7. Click **Save**.

The trade link application is deleted.

TRADACOMS Outbound Trade Link Applications

You can add, edit, and delete TRADACOMS Trade Link Applications.

Adding a TRADACOMS Outbound Trade Link Application:

To add a new TRADACOMS outbound trade link application

1. From the **File** menu, select **Trade Links**.
2. In the **Trade Links** navigator select **Outbound > TRADACOMS**.
The TRADACOMS Outbound Trade Links window opens.
3. Click the **Application** tab.
4. Click the **Add Application** button.
The TRADACOMS Trade Link: Add Application window opens.
5. Select a Document Type.
6. Click **OK**.
7. Add data as desired in the fields in the **SDT/CDT Control No VAT RSG** tab view.
8. With the **Post Offices** tab displayed, select test or production data by enabling one or both **Test** and/or **Production** check boxes.
9. Select a **Test Post Office** and/or **Production Post Office**.
10. Click **Save**.

Editing a TRADACOMS Outbound Trade Link Application:

To edit an outbound TRADACOMS trade link application

1. From the **File** menu, select **Trade Links**.
2. In the Trade Links navigator select **Outbound > TRADACOMS**.
The **TRADACOMS Outbound Trade Links** window opens
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Make changes to any of the fields in **Post Offices** and **SDT/CDT Control No VAT RSG** tab views.
6. When the information is complete, click **Save**.
7. The **Trade Link Saved** message box will open to tell you that your changes have been saved.
8. Click **OK** to close the message box.

Deleting a TRADACOMS Outbound Trade Link Application:

To delete a TRADACOMS outbound trade link application

1. From the **File** menu, choose **Trade Links**.
2. In the **Trade Links** navigator select **Outbound > TRADACOMS**.
The TRADACOMS Outbound Trade Links window opens.
3. Click the **Applications** tab.
4. Select a trade link application from the list.
5. Click the **Delete Application** button.

The **Trade Links Application Removal Confirmation** box opens. The box tells you that you must **Save** after closing the box to complete removal.

6. Click **OK**.

The message box closes.

7. Click **Save**.

The TRADACOMS Outbound Trade Link Application is deleted.

ISA and GS Numbering Schemes

The functional group control number reset does not occur until after the next refresh (the next time the Message Manager's **Export** map is executed). See the Trading Manager documentation for information on scheduling the execution of the **Export** map.

The following list defines the ISA and GS Numbering Schemes.

Increment

This numbering scheme is the default. A perpetually-incrementing interchange control number is used.

The first interchange sent for this relationship has a control number of 1, the second has a control number of 2, and so on.

If you select **Increment**, you can also reset the number to your preference by enabling **Reset** and specifying a control number.

User Defined

Use a user-defined numbering scheme. Enter the full name and path to a compiled map file (**.mmc**) that provides this custom control number.

The compiled map file is required when you select this option. The full file name and path of the compiled map file must be specified relative to the path of the Launcher.

You can also reset the number to your preference by enabling **Reset** and specifying a control number.

Increment by Trading Partner

A perpetually incrementing GS number within this partner link (internal application partner to external trading partner) is used.

The first interchange sent for this relationship has a control number of 1 the second has a control number of 2, and so on.

You can also reset the number to your preference by enabling **Reset** and specifying a control number.

Increment by Application Partner

A perpetually incrementing functional group control number within this partner link (application partner and application partner) is used.

The first functional group sent for this application partner within this trading partner has a control number of 1, the second has a control number of 2, and so on.

You can also reset the number to your preference by enabling **Reset** and specifying a control number.

Increment by Functional ID Code

A perpetually incrementing functional group control number within the functional ID code, regardless of trading partner is used.

The first PO functional group sent has a control number of 1; the second has a control number of 2 (regardless of its partner link), and so on.

Relative

This selection is the default.

A functional group control number that is relative to the functional group's sequence within its interchange.

The first functional group in the first interchange has a control number of 1, the second has a control number of 2, the first functional group in the second interchange has a control number of 1, and so on.

Searching for a trade link

When entering search criteria, case sensitivity for the search depends on the database. By default, Microsoft Access and Microsoft SQL Server are not case sensitive (for example, Acme is the same as ACME), while Oracle is case sensitive. For more information, contact your database administrator to determine if SQL LIKE searches are case sensitive.

Searching for an X12 Trade Link

Refer to the following steps to search for an X12 Trade Link.

To search all X12 trade links

1. Click the **File** menu and select **Trade Links**.
The **Trade Links** navigator opens.
2. Select **Inbound** or **Outbound > X12**.
The **Inbound** or **Outbound X12 Trade Links** window opens. The Search buttons are located at the top of the window. These buttons allow you to search for Trade Links based upon various search criteria.
3. To search all available trade links, click the **All Links** button.
The X12 Inbound Trade Link Lookup: All Links window opens.
4. Sort the names in the list box by selecting one of two **Display** buttons.
 - Select **Names** to sort the list by Trading Partner name. This causes names to be sorted in alphanumeric order.
 - Select **ISA/GS** to sort in ISA order:
5. Select the desired Trade Link from the list and click **Select**.

To search X12 trade links by partner

1. Click the **File** menu and select **Trade Links**.
The **Trade Links** navigator opens.
2. Select **Inbound** or **Outbound > X12**.
3. Click the **Search by Partner** button at the top of the window.
The X12 Inbound Trade Link Lookup: Search By Partner window opens.
4. Define your search criteria by enabling or disabling (checking or unchecking) the check boxes in the Search the following window area and by selecting and deselecting a button in the ISA/GS Search (Exact) window area.
5. When you are satisfied that your search criteria are properly defined, click the **Begin Search** button to populate the list box with trade links that match your search criteria
6. Select the desired trade link from the list box and click **Select**.

To select an X12 trade link by document type

1. Click the **File** menu and select **Trade Links**.
2. Select **Inbound** or **Outbound** > **X12**.
3. Click the **Search by Document** button at the top of the window.
The X12 Inbound Trade Link Document Search window opens.
4. Select a document from the top list box. When you click on the document, the trade links associated with that document display in the bottom list box.
5. Click on the desired trade link then click **Select**.

Searching for an EDIFACT Trade Link

Refer to the following steps to search for an EDIFACT Trade Link.

To search all EDIFACT trade links

1. Click the **File** menu and select **Trade Links**.
2. Select **Inbound** or **Outbound** > **EDIFACT**
3. Click the **Search All** button at the top of the window.
The EDIFACT Inbound or Outbound Trade Link Lookup: All Files window opens.
4. Scroll through the files in the list until you locate the desired file.
5. Click **Select**.

To select EDIFACT trade links by partner

1. From the **File** menu select **Trade Links**.
2. Select **Inbound** or **Outbound** > **EDIFACT**
3. Click the **Search By Partner** button at the top of the window.
The EDIFACT Inbound or Outbound Trade Link Lookup: Search By Partner window opens (an Inbound window is shown below for example purposes).
GRAPHIC
4. Define your search criteria by enabling or disabling (checking or unchecking) the check boxes in the Search the following window area and by selecting and deselecting a button in the Interchange ID Search (Exact) window area.
 - Search for a specific Folder or Trading Partner by entering specific data into the **Search For** field.
 - Search for a specific Interchange ID by entering specific data into the **Interchange ID** field.
5. When you are satisfied that your search criteria are properly defined, click the **Begin Search** button to populate the list box with trade links that match your search criteria
6. Select the desired trade link from the list box and click **Select**

To select an EDIFACT trade link by document

1. From the **File** menu select **Trade Links**.
2. Select **Inbound** or **Outbound** > **EDIFACT**
3. Click the **Search by Document** button at the top of the window.
The EDIFACT Inbound or Outbound Trade Link Document Search window opens.
4. Select a document from the top list box. When you click on the document, the trade links associated with that document display in the bottom list box.

5. Click on the desired trade link then click **Select**.

Searching for a TRADACOMS Trade Link

Refer to the following steps to search for an EDIFACT Trade Link.

To search all TRADACOMS trade links

1. Click the **File** menu and select **Trade Links**.
2. Select **Inbound** or **Outbound** > **TRADACOMS**
3. Click the **Search All** button at the top of the window.
4. The **TRADACOMS Inbound** or **Outbound Trade Link Lookup: All Files** window opens.
5. Sort the files in the list by selecting one of two buttons in the **Display** area at the top of the window.
 - Select the **Names** button to sort the list by Trading Partner name.
 - Select **ID** to sort by Trading Partner ID.
6. Click **Select**.

To select TRADACOMS trade links by partner

1. From the **File** menu select **Trade Links**.
2. Select **Inbound** or **Outbound** > **TRADACOMS**
3. Click the **Search By Partner** button at the top of the window.

The **TRADACOMS Inbound** or **Outbound Trade Link Lookup: Search By Partner** window opens.
4. Define your search criteria by entering starting letters for a trading partner, application partner or from application partner ID in the fields in the **Enter Starting Letters** window area. You can also select whether or not you want to sort using names, or IDs by selecting one of the two **Display** buttons.
5. When you are satisfied that your search criteria are properly defined, click the **Begin Search** button to populate the list box with trade links that match your search criteria
6. Select the desired trade link from the list box and click **Select**.

To select a TRADACOMS trade link by document

1. From the **File** menu select **Trade Links**.
2. Select **Inbound** or **Outbound** > **TRADACOMS**
3. Click the **Search by Document** button at the top of the window.

The **TRADACOMS Inbound** or **Outbound Trade Link Document Search** window opens.
4. Select a document from the top list box. When you click on the document, the trade links associated with that document display in the bottom list box.
5. Click on the desired trade link then click **Select**.

Outbound 999/997/824 trade link

Partner Manager displays the Automatic Acknowledgement Creation dialog box when you:

- Add a trade link
- Copy a trade link
- Add an application to an existing trade link

- The trading partner link requires an outbound functional acknowledgement (an outbound acknowledgement does not already exist for that trading/application partner and version)

Note: The Automatic Acknowledgement Creation dialog box appears only when you are creating X12 trade links. If you select **No Acknowledgement** in the **Ack Level** drop-down list, this dialog box does not appear.

Note: If an 824 is being processed, the default will be to create a 4050 824 transaction. You have the option to change the version with one of the options in a drop-down box enabled for this purpose (currently versions 4050 and 4010 are available).

If you want to create an outbound functional acknowledgement, select a **Put Post Office** from the drop-down list and click **Create**.

Outbound CONTRL trade link

Please note that CONTRL, as used in this section, is *not* a typographical error.

Partner Manager displays the Automatic Outbound CONTRL Creation dialog box when you:

- Add a trade link
- Copy a trade link
- Add an application to an existing trade link
- The trading partner link requires an outbound CONTRL acknowledgement (an outbound acknowledgement does not already exist for that trading/application partner and version)

The Automatic Outbound CONTRL Creation dialog box appears only when you are creating EDIFACT trade links.

If you select **No Acknowledgement** in the **Ack Level** drop-down list, this dialog box does not appear.

If you want to create an outbound CONTRL acknowledgement, select the **Put and Get Post Offices** from the drop-down list and click **Create**. This dialog box may appear more than once if the link contains multiple versions and/or acknowledgement partners. In this case, the version appears in the dialog box.

The Control Message Type will default to : Version=4, Release=1, Controlling Agency=UN; the sole CONTRL Message Type provided by IBM in the EDIFACT Standards (see Utilities > Standards). This section of the form will remain disabled until you create additional CONTRL Message Types in the EDIFACT Standards definitions. At such a time, this section will be enabled and you can select which CONTRL Message Type to use.

The UNG Options (No UNG vs. Mandatory UNG) is disabled if an Outbound Trade Link already exists for this CONTRL creation, or if the Inbound Trade Link does not contain an UNG-level definition. If an Outbound Trade Link already exists, the UNG Option of that link will be used for the CONTRL document. Note Optional UNG CONTRL Trade Links are not supported.

Note: The Automatic CONTRL form will not be displayed if an Outbound Trade Link already exists, and contains a CONTRL Message Type.

Creating a control number map

Trading Manager supports user-defined numbering schemes in maps for interchange, functional group, and transaction set control numbers. This section describes the requirements for your maps that provide a number and are executed from the Message Manager using the RUN function.

Exchanging information with Message Manager

You implement user-defined control numbering schemes through control number maps. When building envelopes for those application partners that provide partially wrapped X12 data, the compiled map providing the control number level and specified in the Partner Manager is executed by the RUN function.

The Message Manager passes input card 1 to the control number map the last used control number for this particular trading partner, application partner, or transaction set. The control number map returns the control number value to be used as output card 1 to the Message Manager; this value is placed in the appropriate EDI envelope.

This control number returned by the control number map is used to update the last used control number within the Message Manager for the appropriate trading partner, application partner, and transaction set.

Map requirements and features

The control number map must have at least one input card and one output card. You must define input card 1 and output card 1 to accommodate a control number character size of 1-9 characters. For example, define a text or number item with a minimum length of 1 and a maximum length of 9.

Alternately, you could define a control number Group in a type tree with Items that recognize component parts of the one- to nine-character control number. Include an Item where the control number is defined as YYMMDD.

Note: Although the string that is transferred to and from the control number map can be defined as text, the interchange and functional group control numbers must be numeric.

Example: increments other than 1

The map may include other input cards and output cards as needed. For example, you may have established an increment other than one for the ISA control number that you exchange with your partner:

- Input card 1 represents the most recently used control number (**LastUsedControl Number**)
- Input card 2 represents data from a Customer Master Database (**CustomerMasterDB**)
- Output card 1 contains a rule with the SEARCHUP function to find the increment for the ABC Rock customer; the increment is added to the most recently used control number and the result is returned to the Message Manager. The map rule is:

```
=LastUsedControlNumber + SEARCHUP ( Increment Column::CustomerMasterDB , CustID Column::Customer
```

Example of Transaction Set Control Number by Date

For example, a map may concatenate a sequence number with other information such as the current date:

- Input card 1 represents the most recently used control number (**LastUsedControl Number**)
- Output card 1 contains a rule with the CURRENTDATE function. In this example, the first six characters of the control number are the current date in YYMMDD format. The last three characters represent the sequence number of the current data set. If the date from the most recently used control number is the same date as the current date, the sequence number is incremented by one. If the date is not the same as the current date, the sequence number is reset to The map rule is:

```
=IF Shift 9 =( RENTDATE() = YYMMDD>LastUsedControlNumber ,  
SeqNum>LastUsedControlNumber +1 , 1 )
```

Chapter 6. Reports

Use the Reports window to view Close Message Manager transmission and audit report information. The Reports window enables you to view and generate detailed information about transmissions and transactions.

To access the Reports window

Click on Reports the toolbar. Or, select **Reports** from the **File** menu.

The Reports window displays.

The following four types of reports are available from the **Report Type** drop-down box:

- "Traffic Reports"
- "Alerts Report"
- "Additional Reports Overview"
- "Partner Manager Log Report"

You can run Partner Manager reports on the current or archive database. After reports are run, they can be printed or exported.

Reports are presented in views, which provide different levels of detail and enable resend interchange capability. Each report has a default view.

Note: If you do not have any traffic for a data type, that data type will not be displayed in the data type's drop-down box. For example, if you do not have X12 traffic, **X12** will not be listed in the data type's drop-down box.

Traffic reports

Traffic reports contain information on transmissions that have been processed by the Message Manager system in the specified date range.

- Traffic reports can be refreshed at any time.
- The default date selection for traffic reports is configured in the Display Options utility.
- Traffic reports can be run on inbound and outbound directions on a selected report level.
- Traffic reports can be exported to file formats for viewing and printing.
- Traffic reports allow you to edit and resend interchanges.
- Traffic Reports allow you to optionally view X12 997 content, and to jump between X12 997 transmissions and the corresponding Functional Group.
- Traffic Reports allow you to review your X12 Acknowledgement activity. For example, displaying Overdue Acknowledgements, All Unacknowledged, Acknowledged Only, or manually Acknowledged traffic.

Navigate in traffic reports with right-click command access or by clicking the buttons on the toolbar.

Icon Description

- Back to Prior Report
- Report Drilldown
- Display Report Detail
- Refresh Report
- Edit/Resend Interchange
- Resend Interchange Immediately
- Export Report
- Report Info
- Manual Acknowledgement Override
- Jump to Corresponding Functional Group
- Jump to Corresponding 997 Group
- Last Report
- Clear Report Parameters
- Close All and Restart Reports
- Close All Reports

Drill down for details

You can "drill down" to view finer levels of detail from the default report view in traffic reports. The "drill down" options include:

View Type	Drill Down To
All	Display Detail
Transmission	Display Data Type
Data Type	View Interchanges
Interchange	View Functional Groups Resend the interchange immediately Edit/Resend the interchange
Functional Group	Display Transactions
Transaction	Display Segment Errors

Icon colors in the reports provide visual status indicators for each transmission.

For EDIFACT reporting, the drill down may skip functional group views if there are no functional groups in the data.

View Interchanges in Reports

In a data type report view, you can view interchanges for the selected transmission.

To view interchanges

1. In a report, select a single transmission.
2. Click the **Interchanges** button.

The **Interchanges View** appears.

From the **Interchanges View**, you can view Functional Groups, resend that interchange immediately, and edit/resend the interchange. If X12 TA1 records exist, a drill-down from **Interchange** to **Functional Groups** will also display those X12 TA1 records in a separate window.

View Functional Groups in Reports

In an interchange report view, you can view functional groups for the selected interchange.

To view functional groups of a specific interchange

1. In a report, select a single functional group.
2. Click the **Functional Groups** button.

The Functional Groups View appears.

Display detail in reports

For each report view, the **Display Detail** screen provides detailed information on the selected interchange, transmission, functional group, transaction, alert, or log.

Display Transactions in Reports

In a functional group view report, you can view transaction details.

To view transaction details

1. Select a single transmission.
2. Click the **Display Transactions** button.

The **Transactions View** of that transaction is displayed.

Display Segment Errors in Reports

For each transmission in a transactions view report, you can display segment errors if they exist.

To view segment errors of a transmission

1. Select a single transmission in a transaction view of a report.
2. If segment errors exist for the selected transmission, click the **Display Segment Errors** button.

Note: The **Display Segment Errors** button is available only if the selected transmission contains segment errors. If no segment errors exist, the button is not available.

Display Data Types

In a report **Transmission View**, you can view data type details in the **Interchanges View**.

To view data type details

1. Select a single transmission.
2. Click the **Display Data Type View** button.

Double-click a transmission in the **Data Type View** to display functional group details, and then transaction details.

Report specific search

The **Report Specific Search** field is specific to each report level.

Report levels in traffic reports include:

• Transmission	• Message/Transaction
• Interchange	• Traffic Alert
• Functional Group	• Partner Manager Log

Specify a date range

For traffic reports, the **Date Range** can be adjusted as required. Click the option button to choose your date range.

Option	Description
All dates	All dates are reported.
Date Range	When enabled, the From Date and To Date fields can be populated. Click Calendar to choose your From Date and To Date . For Traffic Alerts, the From Time and To Time can be entered in
Today	Data with today's date reported.

Report status icon colors and codes

The colors of the icons in the Partner Manager traffic reports provide visual indicators of status. The status description, **Red**, **Yellow**, **Green** or **Blue** can also be included in the exported the traffic reports by enabling the **Include Traffic Status Color** check box).

Color	Description
Red	Indicates an error in transmission at that level
Red (TA1 reports only)	Rejected
Yellow	Error at a level below displayed transmission level
Green	Transmission completed without errors
Green/Yellow	X12 Functional Acknowledgement is in error
Green (TA1 reports only)	Accepted
Yellow (TA1 reports only)	Partially accepted
Blue	In process

The following table describes each code and its icon color.

Code	Description	Icon Color
2	Syntax version or level not supported	Red
7	Interchange recipient not actual recipient	Red
12	Invalid value	Red

Code	Description	Icon Color
13	Missing	Red
14	Value not supported in this position	Red
15	Not supported in this position	Red
16	Too many constituents	Red
17	No agreement	Red
18	Unspecified error	Red
20	Character invalid as service indicator	Red
21	Service character(s)	Red
22	Invalid service character(s)	Red
23	Unknown Interchange sender	Red
24	Too old	Red
25	Test indicator not supported	Red
26	Duplicate detected	Red
28	References do not match	Red
29	Control count does not match number of instances received	Red
30	Groups and messages/packages mixed	Red
32	Lower level empty	Red
33	Invalid occurrence outside message, package, or group	Red
35	Too many data element or segment repetitions	Red
36	Too many segment group repetitions	Red
37	Invalid type of character(s)	Red
39	Data element too long	Red
40	Data element too short	Red
45	Trailing separator	Red
46	Character set not supported	Red
47	Envelope functionality not supported	Red
48	Dependency condition violated	Red
D01	Mandatory element missing	Red
D02	Data element has incorrect size	Red
D03	Invalid code for identifier	Red
D04	Invalid date format	Red
D05	Invalid time format	Red
E00	Unknown data element	Red
E01	Code list error	Red
E02	Data element has incorrect format	Red
E03	Data element has incorrect size	Red
E04	Missing segment	Red
E05	Missing segment terminator	Red
E06	Mandatory element missing	Red
E07	Error in data	Red

Code	Description	Icon Color
E08	Unknown element found	Red
E09	Failed business rule	Red
E10	Missing element	Red
E11	ISA/IEA format or content error	Red
E12	GS/GE format or content error	Red
E13	Invalid because of errors elsewhere	Red
E14	Missing tradelink	Red
E15	Unknown transaction/Version release	Red
E16	Failed to route to PUT post office	Red
E17	Valid but not delivered because of errors elsewhere	Red
E18	Functional group does not contain any transaction	Red
E19	Contains transaction(s) that do not belong in this functional group	Red
E20	Duplicate transaction	Red
E21	Duplicate functional group	Red
E22	UNB/UNZ format content error	Red
E23	UNH/UNT format content error	Red
F01	FA in error	Green/ Yellow
F02	Rejected via TA1	Green/ Yellow
S01	Segment out of sequence or unknown	Red
S02	Missing mandatory segment/loop	Red
S03	Loop exceeded limit	Red
S04	Segment exceeded limit	Red
S05	Segment has element error	Red
V00	Data valid	Green
V01	Error data found	Yellow
V02	Contains functional group with unknown tradelink	Yellow
V03	Duplicate interchange	Red
V04	Failed to deliver some or all functional groups (inbound)	Yellow
V05	In process	Blue
V06	Failed to deliver some or all interchanges (outbound)	Yellow
V07	Accepted with errors via TA1	Red
V08	Failed Interchange Authorization Check	Red
V09	Failed Interchange Security Check	Red

Partner Manager log report

Access to the Partner Manager Log report is granted or denied in the **Security Groups** utility. The Partner Manager Log report identifies error messages and reports Resend requests/processing. In addition, if Partner Manager security is enabled and then later disabled, a warning will appear in the log. This report is run for a specified date range. You can export the report. For information on how to purge the log, see the "Purge" section in Chapter 8.

Click an options button in the **Reports Options** to dynamically populate the report for **All Messages**, **Errors Only**, **Warnings Only**, and **Information Only**.

Information in the Partner Manager Log report includes:

Field	Description
Source	Source of the log message.
User	The current User ID if Security Groups are being used. If Partner Manager security is not used, User defaults to the database user name that user or the current user.
Date Time	The date and time of the log event in the YYYYMMDD HH:MM:SS format.
Message	Log message that describes the log event.

Note: The Partner Manager Log report replaces the Resend Requests report.

Source of Partner Manager log message

The source of the log message includes incident type and status level.

Possible log message sources include:

Log Message Type	Description	Status Type	Icon
Program Error	Run-time errors generated by the Partner Manager application.	Error	Red
SQL Errors	Errors generated by the database system you are using.	Error	Red
User Maintenance	In the event security is disabled (by deleting the last user).	Warning	Yellow
Login	In the event the user with the password overwrote the database-version check.	Warning	Yellow
Resend	When a resend request is made. Also when the resend item is processed by Message Manager.	Information	Green

Program and SQL errors are useful for communicating with IBM Software Customer Support if problems arise.

Alerts report

The Alert report shows a history of e-mail traffic alert notifications of rejected data for the specified date range and database (current or archive). The dates specified are for the Message Manager map execution dates (when traffic occurs in Partner Manager).

You can specify reporting on traffic alerts that match the following selection requirements:

- Specified Date Range
- Specified Database (Current or Archive)

All traffic in the Message Manager system is reported, regardless of data type.

Information in the Traffic Alert report includes:

Field	Description
PO Nickname	Post office nickname as defined in Partner Manager.
Transmission ID	Unique Transmission ID assigned by Message Manager to the interchange.
Data Type	EDIFACT, X12, or TRADACOMS.
Contact	The e-mail address specified in the Address Book for the trading partner.
Start Time	Time when the traffic alert was sent.

Resend requests

The **Resend Requests** report has been replaced with the Partner Manager Log Report, which logs resend requests.

Transmission report

The **Transmission** report is a standard-independent report that displays a summary of inbound or outbound transmissions.

Note: All transmissions are reported (EDIFACT, TRADACOMS, X12, and any other standards).

You can specify reporting on transmissions that match the specified selection requirements.

Information is displayed for the specified transmission direction (inbound or outbound). The information displayed includes:

Field	Description
Transmission ID	A component of the ThreadID assigned by Message Manager system to the transmission.
Date	Date when the Message Manager transmission processing began.
Time	Time when the Message Manager transmission processing began.
Size	Size (in bytes) of the transmission data.
Return Code	Report status code.
O/R	Original or Resend indicator. An O indicates an original transmission. An R indicates a resent transmission.
Input Thread	Source of the transmission data. If the data source is a file, this column shows the file name. Otherwise, it shows the resource adapter (FTP, E-mail, VAN) command string.
Original Transmission	If this is a resent transmission, the Original Transmission ID is displayed. Blank if this is not a resent transmission.
PO Nickname	Post Office associated with the transmission.

Note: Double-click a transmission, or select a single transmission and click the **Data Type View** button, to display the **Data Type View**.

Interchange report

The Interchange report displays trading partner interchange information for the specified interchange date range.

The **Inbound** or **Outbound Interchanges View** displays information for interchanges and allows you to:

- Resend that interchange immediately
- Edit/Resend the interchange

You can specify reporting on interchanges that match the following selection requirements:

- **Data Type** (select **EDIFACT**, **TRADACOMS**, or **X12**, or other standard from the drop-down list)
- Specific Post Office Nickname
- Specified Date Range
- Direction (Inbound or Outbound)
- Database (Current or Archive)
- Record **Status** of **All Records**, **No Errors**, records with **Errors Only**, or a Specific Status Code
- A specific Trading Partner
- A Report Specific Search (enter a Control Number)

The information displayed includes:

Field	Description
Transmission ID	Unique Transmission ID assigned by Message Manager to the interchange.
Sender Ichg ID/ Qual	ISA Sender ID qualifier and address of the trading partner that sent the interchange.
Sender Name	Trading partner name as defined in the Address Book .
Receiver Ichg ID/Qual	ISA Receiver ID qualifier and address of the trading partner that received the interchange.
IC Ctrl No.	ISA Control number of the interchange.
IC Date	YYYYMMDD format of the date the interchange was created by the sender. (UNB/ISA Envelope)
IC Time	HHMM format of the time the interchange was created by the sender. (UNB/ISA Envelope)

Drill down tips

- Double-click a transmission in the interchange view-to-view functional group information.
- Double-click a transmission in the functional group view to display transaction information.
- Double-click a transmission in the transaction view to display segment errors (if any).

Specific trading partner for the interchange report

In the Interchange report, you can specify a specific trading partner.

To specify a specific trading partner

1. In the **Trading Partner** area, enable the **Sending** or **Receiving** option button.
2. Click the **Find** button.
The specified data type Trading Partners dialog box appears.
3. Select a trading partner.
4. Click **Select**.
The selected trading partner appears in the **Name** field.

Specific status codes for the interchange report

In the Interchange report, you can specify a specific status code.

1. To specify a specific status code
2. For the **Specific Status Code** field, enter the status code.
Or click the **Status Codes** button and select a status code from the **Find All Status Codes** dialog box. Click **Select**.
3. Click the **Run Report** button to run the Interchange report for the specific status code.

Edit and/or resend an interchange

In the Interchange report, you can select a single interchange and edit and resend that interchange immediately.

Note: The **Display Options** → **Editor/Viewer** setting controls which text editor is used to edit the interchange.

To edit and resend an interchange

1. Select a single interchange in the Interchange report.
2. Click the **Edit/Resend Interchange** button in the toolbar.
The Partner Manager Editor window appears.
3. Edit the interchange as desired.
4. If using a text editor other than the Partner Manager Editor:
 - Save the file and close that editor.
 - Click **Revert** on the Partner Manager Editor toolbar to view the interchange in the Partner Manager Editor window.
5. Click **Resend** on the Partner Manager Editor toolbar.
A confirmation dialog box appears.
6. Click **OK** to resend the data as displayed.

A resend status confirmation dialog box appears. The location of the resend data and the interchange file name is displayed.

The resend, user, date and time stamp, and message appear in the Partner Manager Log report.

Note: The **Security Group Maintenance** → **Transmission Data** setting controls edit and resend capability.

Resend an interchange immediately

In the Interchange report, you can select a single interchange and resend that interchange immediately.

To resend an interchange immediately

1. Select a single interchange.
2. Click **Resend Interchange Immediately** button on the toolbar.
A resend confirmation dialog box appears.
3. Click **OK** to send the interchange.
A sent confirmation dialog box appears.
4. Click **OK**.

The resend, user, date and time stamp, and message appear in the Partner Manager Log report.

Note: The **Security Group Maintenance** → **Transmission Data** setting controls edit and resend capability.

Functional group report

The **Functional Group** report displays a summary of functional groups received (**Direction = Inbound**) or sent (**Direction = Outbound**) for sending or receiving trading partners.

For a complete description of all fields in the report display, see the section "Functional Group View" .

Jumping to X12 997

The **X12 Functional Group** Report allows you to jump directly to the corresponding 997 from a functional group.

To jump to a X12 997

1. Select a functional group.
2. Click the **Jump to Corresponding 997 group** icon in the toolbar.
The display "jumps" to the corresponding 997 from the functional group.
3. Use the report's **Back** button to return to the original report.

Note: Two conditions must exist for this function to be available. The selected functional group must have had its Functional Acknowledgment Received (that is, the FG Reconciliation has processed this record), and if user security is in force, the user's Security Group setting for "X12 997 Data: View Data" must be checked.

X12 acknowledgement reporting options

When an **Outbound X12 Functional Group** report is selected in the Reports dialog box, five options become available in the **Report Specific Search** area on the **Acknowledgement Reporting** drop-down menu:

Option	Description
All Records	The default; displays all data regardless of Acknowledgement Status.
Overdue Acknowledgements	Only functional groups that have not been acknowledged within the time frame specified on the trade link will be included. See "Specifying Acknowledgement Timeframe". This time calculation is based on the number of hours specified on the trade link, the map execution date and time, and current date and time of the PC running Partner Manager.
All Unacknowledged	Only Unacknowledged Functions Groups will be included.
Acknowledged Only	Opposite of "All Unacknowledged"; only those functional groups that have been acknowledged will be included.
Manual Acknowledged Only	Only those functional groups that have been manually acknowledged will be included. See Manual Override of Acknowledgement Settings for additional information.

Note: Functional groups that have a Functional Acknowledgement in Error will display a green and yellow arrow pointing right in this report. This arrow and unique color is used to distinguish between a good functional group (green circle), a Functional Group containing an error at a lower level (yellow diamond), and a Bad Functional Group (red stop sign).

Manual override of acknowledgement settings

The **X12 Outbound Functional Group** report allows you to manually set the acknowledgement flag. Normally, the maps set this acknowledgement flag automatically during functional group reconciliation when the 997 is received. However, there may be times where you want to set this flag yourself, perhaps after manual intervention with your trading partner.

To manually set the Acknowledgement flag

1. Select the functional group record you wish to change in this report.
2. Click the **Manual Acknowledgement Override** icon in the toolbar.
The Manual Acknowledgement Override dialog box appears.
The Manual Acknowledgement Override dialog box displays a summary of the Functional Group you selected and two areas:
 - **FA Received.** Select **Yes** or **No**
 - **FA Status Code.** Select one of the four options presented from the **FA Status Code** drop-down menu Accepted, Partial, Rejected, or Error.
3. Click the **Save** button to save your changes, or click **Cancel** to bypass.

Changes are recorded in the **Partner Manager Log** report for auditing purposes. Additionally, the last manual override change is displayed in the **Acknowledgements** section of the **X12 Functional Group Detail** report.

Note: Partner Manager Security can be used to restrict access to the manual override function. The **Allow Override** check box in the Manual FA Override parameter in Security Groups controls this function. See "Utilities" for more information.

Functional group view

The **Functional Group View** displays information about functional groups that meet the specified report selection requirements. The information displayed includes:

Field	Description
Transmission ID	A component of the ThreadID assigned by Message Manager system to the transmission.
Funct'l ID Code	Functional ID code for the functional group from the GS.
GS Sender ID	GS address of the trading partner that sent the functional group.
Sender TP Name	Name of sending trading partner.
Sender AP Name	Name of sending application partner.
GS Receiver ID	GS address of the trading partner that received the functional group.
Receiver TP Name	Name of receiving trading partner.
Receiver AP Name	Name of receiving application partner.
FG Control No.	GS Control number of the functional group.
FG Version	Functional group version number.
FG Date	YYYYMMDD format of the date the functional group was created by the sender. (GS/UNG Envelope)
FG Time	HHMMSS format of the time the functional group was created by the sender. (GS/UNG Envelope)
Ack Status Cd	Functional acknowledgement status code.
Ack Recvd Flag	Flag that indicates receipt (Y or N) of a functional acknowledgement for the functional group sent.

1. To report on functional acknowledgements
2. Specify a **Functional Group Code** of FA in the **Report Specific Search** field.

Message/transaction report

The Message/Transaction report displays information on transactions. You can specify reporting on messages or transactions that match the following selection requirements:

- **Data Type** (select **EDIFACT**, **TRADACOMS**, or **X12**, or other standard from the drop-down list)

- Specific Post Office Nickname
- Specified Date Range
- Direction (Inbound or Outbound)
- Database (Current or Archive)
- Record **Status** of **All Records**, **No Errors**, records with **Errors Only**, or a Specific Status Code
- A Report Specific Search (enter a Message/Transaction Number)

The information displayed includes:

Field	Description
Transmission ID	A component of the ThreadID assigned by Message Manager system to the transmission.
TS ID	Transaction set code of the transaction.
TS Control No	ST control number of the transaction.
Status	Status code of the transaction set: V indicates Valid, E indicates Error.
Sender TP Name	Name of sending trading partner.
Sender AP Name	Name of sending application partner.
Receiver TP Name	Name of receiving trading partner.
Receiver AP Name	Name of receiving application partner.

The information displayed for TRADACOMS includes:

Field	Description
Transmission ID	A component of the ThreadID assigned by the Message Manager system to the transmission.
Message Type	The name of the message in this document, for example INVHD .
Doc Body Index	The index of the body in this document.
STX Sender Info	The identifier specified in this message for the STX Sender.
STX Sender Name	The STX Sender's name, as found in Trading Manager database via the STX Sender Info field, above.
STX Receiver Info	The identifier specified in this message for the STX Receiver.
STX Receiver Name	The STX Receiver name, as found in Trading Manager database via the STX Receiver Info field, above.
SDT Info	The identifier specified in this message for the SDT Partner.
SDT Name	The SDT name, as found in Trading Manager database by way of the SDT Info field, above.
CDT Info	The identifier specified in this message for the CDT Partner.
CDT Name	The CDT name, as found in Trading Manager database by way of the CDT Info field, above.

Field	Description
Body Ref	The index of the body in this interchange.
Doc Type	The Document Type of this message, for example INVOIC .
Map Date	The date the map created this traffic record.

Viewing 997 content

The **X12 Transaction Report** allows you to view the content of the selected 997 transaction. This is useful to see how your partner responded to your transmission.

To view 997 content

1. Select a 997 transaction.
2. Click on the **Display Report Detail** icon on the toolbar.

If 997 content exists, it will be displayed in the right hand side of the **X12 Transaction Detail** window.

Note: The following conditions must be true in order to view 997 content. If user security is in force, the user's Security Group setting for **X12 997 Data: View Data** must be checked. Additionally, to have 997 content written to a database so it can be viewed here, the Store 997 Content in Database check box, found in **Utilities** → **Message Manager Configuration**, must be enabled.

Jumping to a functional group

The **X12 Transaction** report allows you to jump directly to the corresponding Functional Group from a 997 transaction.

To jump to a functional group from a 997 transaction

1. Select a 997 transaction.
2. Click on the **Jump to Corresponding Functional Group** icon on the toolbar.
The display "jumps" to the functional group from the 997 transaction.
3. Use the report's **Back** button to return to the original report.

Note: Any traffic data converted from releases prior to Trading Manager V7.0 will not have this option available.

X12 TA1 status reports

The X12 TA1 Status reports TA1 status information for the specified date range.

The information displayed includes:

Field	Description
Transmission ID	A component of the ThreadID assigned by the Message Manager system to the transmission.
Sender Ichg ID/Qual	ISA sender ID qualifier and address of the trading partner that sent the interchange.
Receiver Ichg ID/Qual	ISA sender ID qualifier and address of the trading partner that received the interchange.

Field	Description
Orig IC Ctrl No	Original ISA control number
Original IC Time	Original HHMM format of the time the interchange was created by the sender
IC Ack Code	ISA control number acknowledgement code.
IC Note Code	ISA control number note code

Additional reports overview

The **Additional Reports** view enables you to generate detailed reports that you can print or export.

Additional reports include:

- Application Partner Detail Report
- EDIFACT Inbound Trade Link Application Report
- EDIFACT Outbound Trade Link Application Report
- Post Office Report
- TRADACOMS Inbound Trade Link
- TRADACOMS Outbound Trade Link
- Trading Partner Detail Report
- X12 Inbound Trade Link Application Report
- X12 Outbound Trade Link Application Report

Running additional reports

Additional reports are selected from the **File** menu.

To run additional reports

1. Click on the **Reports** button on the toolbar.
The Reports window displays.
2. Select **Additional Reports** from the **Report Type** drop-down box.
3. Select a report from the **Reports** drop-down box.
4. Click the **Run Report** button.
The report-specific form appears.
5. Make your selections.
6. Click the **Run Report** button.

Printing Partner Manager reports

Traffic reports must be exported to xml, html, or text formats prior to being printed. You can then print the exported file from a browser, the Partner Manager Editor, or any text editor.

Exporting reports

Traffic reports use the Traffic Report Export feature.

Additional reports use the export feature.

Exporting traffic reports

The **Traffic Report Export** feature enables you to export traffic reports to html, xml, and plain text formats.

You can specify the action to take place after the export is completed:

Action	Description
Launch Browser	The default browser is launched.
Launch Editor	The Partner Manager editor or the user-specified editor (defined in the Display Options utility) is launched.
Exit without Launching File	No editor or browser is launched.

You can specify the number of rows to export and whether to include the traffic status color in the exported file.

If reports are exported to an existing file, the existing file is overwritten.

Note: The file that was overwritten is moved to the recycle bin.

To export a traffic report

1. Click the **Export** button.
The Traffic Report Export dialog box appears.
2. In the **Report Column**, select the columns to export.
3. Select the **Export Method**.
4. Select the **After Export Completes** action.
5. Select the **Number of Rows to Export**.
6. Enter the full path and filename of the export file or click **Browse** to navigate your file system to **Select/Enter Export File Destination**.
The **File name** defaults to the *reportview.reporttype* name.
7. Specify the **File name**.
8. Click **Save**.
If the export file already exists, an overwrite confirmation dialog box appears. Files that are overwritten are moved to the recycle bin.
9. Click **Begin Export**.
The report is exported.

Default traffic report export settings

- All report columns are selected for export by default.
- Where applicable, the **Include Traffic Status Color** check box is enabled by default.
- The default export method is **HTML Page**.
- The default behavior to occur after export is **Launch Browser**.
- The default number of Rows to Export is **All**.

Value Added Tax (VAT) reports

The TRADACOMS subsystem (inbound and outbound) will create VAT reports for any invoice type messages. For example: INVOIC, CREDIT, and UTLBIL. The VAT report will automatically be created in the default *install_dir\tmgr_vn.n\mmgr\VAT_Reports* directory.

If you wish to change the default directory, you can change the location in the **Edit Resource** dialog box in the **Resource Registry**.

To change the default directory

1. Open the **Resource Registry**.
2. Select **Open** from the **File** menu and navigate to the *install_dir\tmgr_vn.n\mmgr\mmgr.mrm*
3. Expand the **mmgr** file.
4. Expand the **Resources** file.
5. Double-click the **mmgr_trc_VatReport** file.
The Edit Resource dialog box appears.
6. Edit the **Resource Value** to the desired location.
7. Click **OK**.

Partner Manager editor

This editor extracts data from the archives and presents the data to enable access to the original EDI data as presented to Trading Manager.

The Partner Manager Editor is used to:

- Edit and resend interchanges
- View reports exported in html or xml format.
- The Editor can be used to print the exported reports. Other features of the Editor enable you to:
 - Save the exported file
 - Save the exported file in a different format
 - Revert to the saved file (brings in the user-specified editor changes)
 - Launch a user specified editor
 - Find/Replace/Highlight text in the exported file
 - Format the exported file

Note: If you use the **Find/Replace/Highlight** feature and then resize the Editor window, the color changes are not saved.

Note: Use care when using the Editor as the user-specified editor may have multiple files open.

Chapter 7. Resending E-commerce data

Inbound and outbound data that has been processed by Trading Manager can be viewed and edited. Run the Interchange traffic report to resend the interchange immediately or edit/resend the interchange data. The resend interchange data feature extracts data from the Message Manager **archive** folder.

- The resend immediately feature allows you to resend a message immediately, without viewing or editing the original e-commerce data, inbound or outbound.
- The edit/resend interchange feature allows you to edit the interchange, and then resend it.

You must run the Interchange traffic report to access these features.

Note: The **Security Group Maintenance** → **Transmission Data** setting controls view, edit, and resend capability.

The ability to resend inbound or outbound data allows you to resubmit e-commerce data that had previously been transformed correctly, but may have encountered transmission errors during processing by the receiving application.

You can view and edit the original e-commerce data prior to resending to your trading partner or internal application. This allows you to update a code that did not pass EDI validation, or create a file containing only a single transaction set that for resubmission.

The **Message Manager** picks up and reprocesses the file that was resent. A new ThreadID reflects this resend activity.

The Server Directory Configuration Maintenance utility configures the location of the archived transmission data and the location where resent data is placed.

Note: For more information on the **Update** and **Resend** components of the Message Manager, see the Trading Manager documentation.

Resend ThreadID

The **Message Manager System Resend** map creates a new **ThreadID** for the data, changing the origin indicator from original (**o**) to resend (**r**). For example:

- Original **ThreadID** - edi00001199809150001oi.app
- Resent **ThreadID** - edi00002199809150001ri.app

Partner Manager maintains a complete audit trail of the resent data based on its new **ThreadID**.

Chapter 8. Utilities

This chapter describes Partner Manager options that are set using the Utilities navigator.

The navigator can be opened by clicking the **Utilities** icon on the Partner Manager toolbar, or by selecting **Utilities** from the **File** menu.

Options that can be set using the **Utilities** navigator include the following:

- Configuration
- Database Utilities
- Folders
- Security

Configuration

The **Configuration** utilities contains the following:

- Database Settings
- Display Options
- Message Manager Configuration
- Post Office Search and Replace
- Post Office Types
- Server Directory Configuration
- Standards

Database settings

In the **Database Settings** utility, you can:

- Change the database you are currently using; see "Importing a Database Profile"
- Create a new database profile; see "Creating a New Database Profile"
- Import a database profile; see "Importing a Database Profile"
- Export a database profile; see "Exporting a Database Profile"
- Edit an existing profile; see "Editing an Existing Database Profile"
- Delete an existing profile; see "Deleting an Existing Database Profile"

Database selection

Partner Manager lets you change the current database through the Database Selection dialog box.

To change the current database

1. From the **File** menu, select **Database Settings**.
The Partner Manager Database Selection window opens:
2. Select the database vendor from the drop-down menu.
3. Select the Data Source Name (DSN) from the drop-down menu.

Note: You create DSNs from the **ODBC** applet in the Windows **Control Panel**.

4. Enter a user ID and password, if required.
5. Enter the database file name.

Note: For Access and Oracle databases, you can leave the **Database** field blank. For all other database types, enter the name of the database, as it exists on the server.

6. (Optional) Enter a description of the database (as it will appear in the title bar).
7. Click **Test Connection**.
The **Connection Test OK** message box opens to inform you that the test has been satisfactorily completed.
8. Click **OK**.
The **Text Connection** message box closes.
9. Click **OK** in the Partner Manager Database Selection window.
A message box opens that informs you that Partner Manager parameters are being updated.
10. Click **OK**.
Partner Manager closes.
11. Restart Partner Manager to use the new database.

Creating a new database profile

To create a new database profile

1. From the **File** menu, select **Database Settings**.
The Partner Manager Database Selection dialog box appears.
2. Click **Profile Maintenance**.
The Back-End Profile Maintenance dialog box opens.
3. Enter a name for the new profile and press **Tab** or **Enter**.
A dialog box appears asking you to confirm the creation of the new profile.
4. Click **Yes** to create the new database profile.
5. (Optional) Enter a description for the profile.
6. Select the Data Source Name (**DSN**) from the drop-down menu.
7. Enter a user name and password, if required.
8. Enter the database file name.
For Access and Oracle databases, leave the **Database** field blank. For all other database types, enter the name of the database, as it exists on the server.
9. Select a database vendor from the drop-down list.
10. Click **Test Connection** to confirm the database connection.
11. Click **Save** and **OK** to confirm the new profile.
12. Click **Cancel** to close the dialog box.

You can now select the profile from the **Profile** drop-down list.

Importing a database profile

To import a database profile

1. Open the Back-End Profile Maintenance window as described in "Creating a New Database Profile" .
2. Click the **Import** button.

The Profile Import window opens.

3. Select an Import Source:
 - If you are importing from a file, click the **Browse** button and navigate to the file that you want to import. The path will be displayed in the **File to import** field.
 - If you are pasting XML from an existing file, select the **Paste from Clipboard** button to activate the **Paste Export File Here** text entry box. Click in the **Paste Export File Here** field and use the windows copy feature to copy the XML from the clipboard.
4. Select an Import Option:
 - If you want over-write the existing profile, select the **Over-write Existing** button.
 - If you do not want to over-write the existing profile (skip it), select the **Skip Existing** button.
5. Click the **Import** button.

Exporting a database profile

To export a database profile

1. Open the Back-End Profile Maintenance window as described in "Creating a New Database Profile" .
2. Click the **Export** button.

The **Profile Export** window opens.
3. Select a Profile ID by placing a check beside the desired profile in the list, or if you want to select all of the profiles, click the **Select All** button.
4. Choose the export method:
 - If you want to export the profile to a file, click the Export to File checkbox, then use the **Browse** button to navigate to the file you want.
 - If you want to export to clipboard, check the Export to Clipboard checkbox.
5. Click the **Export** button.
 - If you selected Export to File, the profile is copied to the file that you selected.
 - If you selected Export to Clipboard, the profile is copied to the clipboard.

Editing an existing database profile

To edit an existing database profile.

1. From the **File** menu, select **Database Settings**.

The Partner Manager Database Selection dialog box appears.
2. Click **Profile Maintenance**.

The Back-End Profile Maintenance dialog box appears.
3. Select an existing profile from the **Profile** drop-down list.
4. Edit the settings.

Note: For Access and Oracle databases, leave the **Database** field blank. For all other database types, enter the name of the database, as it exists on the server.

5. Click **Test Connection** to confirm the database connection.
6. Click **Save**.

A dialog box opens that confirms successful database connection.

7. Click **OK**.
8. Close Partner Manager.
9. Restart Partner Manager.

Deleting an existing database profile

To delete an existing database profile

1. From the **File** menu, select **Database Settings**.
2. The **Partner Manager Database** Selection dialog box appears.
3. Click **Profile Maintenance**.
The Back-End Profile Maintenance dialog box appears.
4. Select a profile from the **Profile** drop-down list.
5. Click **Delete**.
A confirmation box opens that asks you to confirm the delete.
6. Click **Yes** to delete the profile.
7. Click **Cancel** to close the Back-End Profile Maintenance dialog box.
8. Click **OK** to close the Partner Manager.
9. Restart Partner Manager.

Selecting a different database profile

To select a different database profile

1. From the **File** menu, select **Database Settings**.
2. The **Partner Manager Database** Selection dialog box appears.
3. Select an existing profile from the **Profile** drop-down list.
4. Click **OK** to close the Partner Manager.
5. Restart Partner Manager.

Display options

The **Display Options** utility allows you to modify the display according to your personal preferences. Display options are set using the Display Options dialog.

Opening the Display Options dialog

1. From the **Tools** menu, select **Display Options**.
The Display Options dialog box opens.
2. Refer to the following sections to specify display options.

Specifying processing options

The following procedures describe how to set processing options for your display.

To specify processing options

1. Open the Display Options dialog as described in the Display Options section. Make certain that the **Processing Options** tab is selected.
2. Select the most recently used trade links to display when you open Partner Manager by enabling or disabling the **Display Last Inbound Trade Link** check box, and/or the **Display Last Outbound Trade Link** check box.
3. Specify the default date selection for all traffic reports. Select **Today**, or **All Dates**.

4. Select Standards (X12, EDIFACT or TRADACOM).

Note: The **Standards** check boxes allow you to restrict display of EDI Standard-Specific options. For example, if your company does not use EDIFACT or TRADACOMS, you can disable these options and the screens specific to these two standards will not appear. You can always restore access to these standards by enabling the check box. This setting only applies to the PC running Partner Manager; it does not affect other users

5. When you are satisfied with your selections, click **Save**.

Specifying transmission data options

The following procedures describe how to specify the editor and temporary directory to be used for viewing and editing transmission data in the traffic reports and during the traffic export.

To specify the default editor/viewer

1. Open the Display Options dialog as described in the Display Options section.
2. Select the **Transmission Options** tab.
3. For the **Editor/Viewer**, enable an option button:

Default to Built-in Editor or

Default to User-Specified Editor

4. If you choose to default to a user-specified editor, enter the full path of that editor application executable program file in the **User Specified Editor** field. (For example, **C:\WINNT\notepad.exe**).

Note: The user-specified editor must accept a file name as a parameter. The user-specified editor can be launched by default or launched from the Partner Manager Editor.

5. Specify the **Temporary Directory**.

Note: While an interchange is being edited, it is placed in this temporary directory until the editing/resent operation is complete.

6. When you are satisfied with your selections, click **Save**.

Change the look and feel of the display

The following procedures describe how to make changes to the look and feel of the display based upon your personal viewing preferences.

To make changes to the Display

1. Open the Display Options dialog as described in the Display Options section.
2. Select the **Look and Feel** tab.
3. If you want to hide the IBM banner that appears at the top of the Partner Manager application, disable the **Display IBM Banner** check box.
4. Select Startup Options:

If you want Partner Manager Windows to display in standard Windows default mode, enable the **Windows Default** check box.

If you would prefer the active window always be displayed on top of all others, enable the **Display at Top** check box.

Note: You may find that the Display at Top mode of operation is useful if you are using a lower resolution screen display (for example 800 x 600).

5. When you are satisfied with your selections, click **Save**.

Message Manager configuration maintenance

The Message Manager Configuration Maintenance window is used to specify the run-time parameters used by the system of maps in the Message Manager portion of Trading Manager.

These settings apply to all users of the current database (the current database is displayed in **Help > About**). If you have multiple Trading Manager databases (for example, Test or Production), you may want to set these parameters to all of them.

To specify Message Manager parameters

1. From the **Tools** menu, select **Message Manager Configuration**.

The Message Manager Configuration Maintenance window opens.

2. Make changes to the fields in this window by selecting one of six tab views.

For a detailed description of fields contained in the tab views, refer to the tab view discussed in the following sections:

- "Optimization Tab"
- "Mapping Options Tab"
- "Database Tab"
- "X12 Acknowledgements Tab"
- "Archive Options Tab"
- "Traffic Batch Archiving Tab"

3. Click **Save**.

The information that you have entered using this form is saved.

Optimization tab

The Message Manager Configuration Maintenance window with the **Optimization** tab selected is shown below. Open the window as described previously in this section. Refer to the table following the figure for field descriptions.

Optimization Tab Field Descriptions

The Message Manager Configuration Maintenance window, shown above, displays the following fields when the **Optimization** tab is selected:

Field	Description
-------	-------------

Maximum Validation Size	The value entered represents the maximum size of a functional group that will be validated in a single pass. If a functional group is larger than this size, then each transaction will be validated individually. Best performance is achieved when validating the functional group in a single pass, but it will consume that much more memory and might exceed the capacity of the server and cause Trading Manager to fail. Setting this value allows for smaller functional groups to be processed as fast as possible while larger functional groups will not cause undue crashes or performance degradation.
Work File Options	<p>The options available from this drop-down menu are used by Message Manger to determine the work file setting for all RUN maps used in the system. These options are:</p> <p>-WM - places all work files in memory, which increases performance, but uses memory.</p> <p>-W - places work files as physical files on the disk, using default work file names, which results in slower performance but reduces memory usage.</p> <p>Note This option should only be used in specific debugging cases as it forces all RUN maps to be single threaded. If work files on disk are desired, use option -WU (see below).</p> <p>-WD - indicates default work files on disk, delete when done.</p> <p>-WU - indicates uniquely named work files on disk, delete when done.</p>
One File per Put PO	For outbound files, creates one file containing all the interchanges destined for that specific put Post Office. This eliminates the need to develop a custom system to append all the data into a single file for delivery.
One File per Put PO per Interchange	For outbound files, this option allows this version of Trading Manager to run as it did in previous versions and creates one output file for each interchange.

Mapping Options tab

The Message Manager Configuration Maintenance window with the **Mapping Options** tab selected is shown below. Open the window as described previously in this section. Refer to the table following the figure for field descriptions.

Mapping Options Tab Field Descriptions

The Message Manager Configuration Maintenance window, shown above, displays the following fields when the **Mapping Options** tab is selected.

Field	Description
Maximum Reject File Size	This text entry field allows you to enter a value that restricts the amount of EDI data that can be shown in the reject cards. The Message Manager subsystems produce error reports for any EDI data content that fails validation. If the size of the reject data is greater than the value shown, then data will not be present in the error report. The data will still be archived and can be re-sent. A value of '0' means that the Reject data will always be shown in the Error Report.
Minimum Reject Data Size	This text entry field allows you to set a value that will cause Message Manager to ignore meaningless EDI data between interchanges or attached at the end, such as extra "new line" characters or messages from a VAN. The value should be set to less than the smallest size of an interchange, or data in general, that you expect to receive.
Optional X12/EDIFACT Validation	When enabled, this check box performs: For X12: IEA/GE segment count comparisons; IEA/ISA and GE/GS control number comparison and ST01/GS01 Validation. For EDIFACT: UNB/UNZ and UNG/UNE control number comparison and segment count comparison.

Database tab

The Message Manager Configuration Maintenance window with the **Database** tab selected is shown below. Open the window as described previously in this section. Refer to the table following the figure for field descriptions.

This tab view also provides the **Run Export** button. For details see the "Run Export" on page 103.

Database Tab Field Descriptions

The Message Manager Configuration Maintenance window, shown above, displays the following fields when the **Database** tab is selected..

Field	Description
Use Stored Procedures	When checked, stored procedures will be used for outbound control number generation and thread id generation on Oracle, SQL Server, Sybase, and DB2 (Non-USS). Not applicable for Access or DB2 running on USS.

Sort TSV Files During Extract	If this check box is enabled, Message Manager will re-sort the tables as they are being created in the export process. This is required when non-alphanumeric or lower/uppercase characters are used to uniquely identify Trading or Application Partners, and your database sort order does not match IBM's sort order.
Current DB Vendor	This is a read-only field used by Message Manager to generate SQL statements when they are database dependent.

Run Export

The **Run Export** button allows you to trigger the Export process on demand, without having to cycle the Launcher. By default, this version of Trading Manager is configured to run Export to synchronize the tsv files with the database at Launcher startup and every day at midnight. You can use the **Run Export** button if you want the tsv files to be synchronized immediately without having to wait for the scheduled time.

Note: Running unnecessary Exports adds overhead to Message Manager and can interfere with the processing of EDI data.

You can review the results of a successful export by viewing the Partner Manager log file.

X12 acknowledgements tab

The Message Manager Configuration Maintenance window with the **X12 Acknowledgements** tab selected is shown below. Open the window as described previously in this section. Refer to the table following the figure for field descriptions.

X12 acknowledgements tab field descriptions

The Message Manager Configuration Maintenance window, shown above, displays the following fields when the **X12 Acknowledgements** tab is selected.

Field	Description
Store 997 Content in Database	When enabled, this check box allows the content of all 997's received to be stored in the database so they can be viewed in traffic reports. Storing 997 data in the database increases the size of the database and can have an impact on Message Manager performance.
Ignore Missing Trade Links for Inbound 997's	If you do not want to custom process inbound 997s, you can skip entering Trade Links for them and thus prevent Message Manager from generating Trade Link errors. Message Manager will still reconcile Inbound 997s against the outbound transactions recorded in the Partner Manager database regardless of this setting.

Field	Description
Create one FG for each 997 Transaction	By default Trading Manager will wrap as many 997 transactions in a single functional group as possible. When enabled, this option forces each 997 transaction to be wrapped in its own functional group.
No TA1s	Disables Trading Manager TA1 processing.
Create TA1 in TA1 Folder	Enables creating error TA1s and places them in the x12\TA1 folder.
Create TA1 and Route to Partner	Enables creating error TA1s and routes them to the external partner.
Create TA1 in TA1 Folder and Route to Partner	Enables creating error TA1s and places them in the x12\TA1 folder as in previous releases of CM and also routes them to the external partner.
Create 000 TA1's	When enabled, this check box allows Message Manager to build TA1s for interchanges that do not fail the TA1 envelope check., as Message Manager, by default, only creates TA1s for interchanges that fail the check. These TA1s have a code of 000.
Default TA1 Post Offices	If TA1 routing is selected, these options have to be entered to properly route TA1. They define the default GET and PUT PO for any TA1 created. These default POs can be overridden for each partner in the Address Book.

Archive Options tab

The Message Manager Configuration Maintenance window with the **Archive Options** tab selected is shown below. Open the window as described previously in this section. Refer to the table following the figure for field descriptions.

Archive Options tab field descriptions

The Message Manager Configuration Maintenance window, shown above, displays the following fields when the **Archive Options** tab is selected.

Field	Description
Inbound Transmission as delivered to Trading Manager (zip/tar)	Archive all inbound transmissions into Trading Manager in a zip or tar format. The archived files are located in <i>install_dir\tmgr_n.n\mmgr\archive\stampfil</i> folder and are not used by Trading Manager. Users that already have archiving processes somewhere else can disable this feature for better performance.
Outbound Transmission as delivered to Trading Manager (zip/tar)	Archive all outbound transmissions into Trading Manager in a zip or tar format. The archived files are located in <i>install_dir\tmgr_n.n\mmgr\archive\stampfil</i> folder and are not used by Trading Manager. Users that already have archiving processes somewhere else can disable this feature for better performance.

Field	Description
Inbound Interchange (Text)	Archives all inbound interchanges in text format. These files are used by Partner Manager's edit/resent feature. Feature can be disabled if Edit/Resend is not used.
Outbound Interchange before Trading Manager re-enveloping (Text)	Archives all outbound interchanges before re-enveloping in text format. These files are used by Partner Manager's edit/resent feature. Feature can be disabled if the Edit/Resend features are not used or not required.
Outbound Interchange after Trading Manager re-enveloping (Text)	Archives all outbound interchanges after re-enveloping in text format. These files are used by Partner Manager's edit/resent feature. Feature can be disabled if the Edit/Resend features are not used or not required.
Outbound Transmission after Trading Manager re-enveloping (zip/tar)	Archive all outbound transmissions out from Trading Manager in a zip or tar format. The archived files are located in the <i>install_dir\tmgr_n.n\mmgr\archive\sendx12</i> , <i>install_dir\tmgr_n.n\mmgr\archive\sendedf</i> , or <i>install_dir\tmgr_n.n\mmgr\archive\sendtrc</i> folder (based on the data format) and are not used by Trading Manager. Users that already have archiving processes somewhere else can disable this feature for better performance.

Traffic batch archiving tab

The Traffic Batch Archiving option automatically moves traffic to the on-line archive using Message Manager. Data will be kept for the number of days specified. The results of this archiving is reported in the Partner Manager log.

The Message Manager Configuration Maintenance window with the **Traffic Batch Archiving** tab selected is shown below. Open the window as described previously in this section. Refer to the table following the figure for field descriptions.

Traffic batch archiving tab field descriptions

The Message Manager Configuration Maintenance window, shown above, displays the following fields when the **Traffic Batch Archiving** tab is selected.

Field	Description
Enable Batch Traffic Archiving	This flag enables the batch traffic archiving.
Days to Keep	Specifies how many days worth of traffic is to be left in the traffic tables. If you enter a 0 in this field, all traffic will be moved to the online archive.

Post Office search and replace

The Post Office Search and Replace function is used to replace Post Office Directory/Adapter command strings when deploying Message Manager on a different system.

To search and replace Post Offices

1. Click the **Utilities** icon on the toolbar.
The **Utilities** navigator opens.
2. Click **Configuration > Post Office Search and Replace**.
The Post Office Search and Replace window opens.
3. Select a Post Office Type to be replace. You can choose to replace File Post Offices, All Post Offices, or you can choose a specific Post Office Type from the drop-down list.
4. Enter the existing Post Office Directory/Adapter Command string in the **Find What** text entry field.
5. Enter the string that you want to replace the existing string with in the **Replace With** field.
6. Click **Replace**.

Post Office types

The Post Office types window allows you to mark post offices that are not used by your organization as inactive. This window also allows you to add and delete post offices.

Marking a Post Office type inactive/active

You can mark any post office type in the list as inactive as long as there are no post offices assigned to it. After the post office is marked as inactive, it will not appear in the list of post offices in the **Post Office** navigator.

To inactivate/activate Post Offices

1. Click the **Utilities** icon on the toolbar.
The **Utilities** navigator opens.
2. Click **Configuration > Post Office Types**.
The Post Office Types dialog opens.
3. Select the Post Office that you want to make inactive and click **Edit**.
The Post Office Types Maintenance dialog opens.

Note: You cannot mark any post offices types as inactive if they currently have post offices assigned to them.

4. Enable the **Inactive** check box.
5. Click **Save**.

You are returned to the **Post Office Types** form. Notice that a **Y** (Yes) now appears in the **Inactive** column of the form on the line associated with the post office that you deactivated.

6. To make the Post Office active again, perform steps 1 - 3 of this procedure. When the Post Office Types Maintenance window opens, deactivate the Inactive check box and click **Save**.

An **N** (No) is displayed in the **Inactive** column of the Post Office Types dialog on the line associated with the post office that you activated.

Adding a Post Office type

You can add a Post Office Type.

To add a post office type

1. Click **Utilities** icon on the toolbar.
The **Utilities** menu opens.
2. Click **Configuration > Post Office Types**.
The Post Office Types dialog opens.
3. Click **Add**.
The Post Office Types Maintenance dialog opens.
4. Enter the post office type in the **Post Office Type** field.
5. Enter a description of the post office type in the **Description** field.
6. Click **Save**.
You are returned to the Post Office Types window. The new post office is displayed in the list.

Deleting a Post Office type

You can delete a Post Office Type.

Note: Supplied Post Offices cannot be deleted. These post offices include: OracleAQ; MessageQ Client; MessageQ Server; E-mail; File; FTP; HTTP; JMS; MQSeries Client; MQSeries Server; MSMQ; and VAN.

To delete a post office type

1. Click the **Utilities** icon on the toolbar.
The **Utilities** menu opens.
2. Click **Configuration > Post Office Types**.
The Post Office Types dialog opens.
3. Select the post office to be deleted.
4. Click **Delete**.
A message box opens that asks you to confirm the delete.
5. Click **Yes**.
You are returned to the Post Office Types dialog. The post office is removed from the list.

Server directory configuration

The **Server Directory Configuration Maintenance** utility is used to:

- Specify the archive access method
- Specify FTP Connection Information
- Specify the **Archive** and **Resend** transmission data folder locations
- Specify the archive audit information
- Allow you to test the archive access and folder configuration

To access the Server Directory Configuration Maintenance utility

1. From the **Tools** menu, select **Server Directory Configuration**.
The Server Directory Configuration Maintenance window opens.

2. Select the access method as either **FTP** or **Mapped Drive** by enabling the check box.

If **FTP** is selected, enter information in the fields in the **FTP Connection Information** area of the form.

3. Define the location of the archive and resend data folders.
4. Define the location of the share data folders. This initialization is needed for specifying the location of alias files and for use of the manual export function in the Message Manager Configuration utility.

See "Managing Traffic Data" for detailed information.

Standards

Note: Incorrect use of this feature may result in invalidation of your trade links.

Ensure that you back up your Partner Manager database files before attempting the procedures described in this section.

The **Standards Maintenance** utility enables you to maintain X12, EDIFACT, and TRADACOMS standards such as versions, ID codes, and related standards components. You can add, edit, and delete versions.

The following procedures describe how to perform maintenance on X12, EDIFACT and TRADACOMS Standards.

Adding an X12 standard version

When you add a new X12 standard version, you must also add a functional ID and transaction set associated with that version. Partner Manager enables you to copy functional ID and transaction sets from an existing version. For example, you can create copies of versions with new version names.

To perform maintenance on X12 standards

Note: To exit from the Standards Maintenance window without adding a version or completing an add task, you must click **Cancel**. If you attempt to exit the dialog box by closing Partner Manager or the Partner Manager process, you may damage your Partner Manager database.

1. From the **Tools** menu, select **Standards**.
The Standards Maintenance window opens.
2. Select **X12 Versions** from the **X12 Standards** drop-down menu.
3. Enter a version number in the **Version** field.
4. Click **Save**.
The Copy Transactions/Func ID's? dialog box appears.
5. Perform one of the following:
 - To copy functional IDs and transaction sets from another version, enter that version number and click **OK**.
 - To search for and select a functional ID, click **Cancel**.
6. Select **X12 Functional ID** from the **X12 Standards** drop-down menu.
The Standards Maintenance X12 Functional ID window appears.
7. Perform one of the following:
 - Enter a functional ID code in the **Functional ID Code** field.
 - Click **Display Functional ID's** to select a functional ID from the list box.

8. Click **Save**.
9. Select **X12 Transaction Set** from the **X12 Standards** drop-down menu.
The Standards Maintenance X12 Transaction Set window opens.
10. Perform one of the following:
 - Enter a transaction set ID in the **Transaction Set ID** field, or
 - Click **Display Transaction Sets** to select a transaction set from the scroll box.
11. Complete the **Transaction Set Description** field.
12. Click **Save**.

Deleting an X12 standard version

To delete an X12 standard version with associated transaction sets and functional IDs, delete its associated transactions sets and functional IDs first.

To delete an X12 standard version

1. From the **Tools** menu, select **Standards**.
The Standards Maintenance form opens.
2. Select **X12 Transaction Set** from the **X12 Standards** drop-down menu.
The Standards Maintenance X12 Transaction Set window appears.
3. Click the **Display Transaction Sets** button.
The Find All Transaction Sets window opens.
4. Choose the transaction set associated with the version and functional ID and click **Select**.
You are returned to the Standards Maintenance X12 Transaction Set window.
5. Click **Delete**.
6. Select **X12 Functional ID** from the X12 Standards drop-down menu.
7. Click the **Display Functional IDs** button.
8. Select the functional ID associated with the version and click **Select**.
9. Click the **Delete** button.
10. Select **X12 Versions from the X12 Standards** drop-down menu.
11. Enter a version number in the **Version** field or click **Display Versions** to select a version number.
12. Click **Delete**.

Adding X12 interchange standards or ID qualifiers

You can add standards and ID qualifiers.

To add an interchange standard or ID qualifier

1. From the **Tools** menu, select **Standards**
2. Select one of the following from the **X12 Standards** drop-down menu:
 - **X12 Interchange Standards**
 - **X12 Interchange ID Qualifiers**
 The **Standards Display X12 Interchange Standards**, or the **Standards Display X12 Interchange ID Qualifiers** window opens.
3. Enter a qualifier number in the **Qualifier** field.
4. Or click **Display Interchange Standards** or **Display Interchange ID Qualifiers** to select a number.

5. Click **Save**.
6. Click **Cancel**.

Adding an X12 hex value

Each X12 hexadecimal value supports up to two individual values, for example, 0D 0A (which is CR LF).

To add an X12 hex value

1. From the **Tools** menu, select **Standards**.
2. Select **X12 Hex Values** from the **X12 Standards** drop-down menu.
The Standards Maintenance X12 Hex Values window appears.
3. Enter a hexadecimal value in the **Hex Value** field.
4. Enter a description in the **Description** field.
5. Click **Save**.

X12 Structure Validation:Import

Imports a file that is used by Message Manager to validate X12 Structure. This is a required step in the installation process for all databases other than Access.

To import an X12 Structure Validation file

From the **Tools** menu, select **Standards**.

1. Select **X12 Structure Validation:Import** from the **X12 Standards** drop-down list.
The Standards Maintenance X12 Structure Validation: Import window appears.
2. Click the **Find File** button to browse for the file you wish to import.
The **StructureValidation.dctl** file, located in the *install_dir\mgr_vn.n\mgr* directory, must be imported during installation.
3. Click **Begin Import**.

X12 Structure Validation:Maintenance

Allows additions, updates, and deletions of X12 Structure information.

Note: This is useful when new/custom standards are used.

To maintain X12 Structure Validation data

1. From the **Tools** menu, select **Standards**.
2. Select **X12 Structure Validation:Maintenance** from the **X12 Standards** drop-down list.
The Standards Maintenance X12 Structure Validation: Maintenance window appears.
3. Enter information in the **Version**, **Transaction Set ID** and **Structure Text** fields.
4. Click **Save**.
Clicking **Save** will add or update the structure text.

Note: When you click the **Delete** button to delete a version, a dialog box appears instructing you to first delete the transaction set.

Deleting X12 interchange standards or ID qualifiers

You can delete standards and qualifiers.

To delete an interchange standard or ID qualifier

1. From the **Tools** menu, select **Standards**.
2. Select one of the following from the **X12 Standards** drop-down list:
 - **X12 Interchange Standards**
 - **X12 Interchange ID Qualifiers**

The **Standards Maintenance X12 Interchange Standards** window, or the **Standards Maintenance X12 Interchange Qualifiers** window opens.
3. Enter a qualifier number in the **Qualifier** field.
 - Or click **Display Interchange Standards** (if you opened the **Standards Maintenance X12 Interchange Standards** window) or
 - **Display Interchange ID Qualifiers** (if you opened the **Standards Maintenance X12 Interchange Qualifiers** window) to select a number.
4. Click **Delete**.

Selecting HIPAA institutions

The **HIPAA Institutions** option allows you to populate the **HIPAA Type 7 Institutions** field in the **X12 External Application Partners** window.

To select HIPAA Institutions

1. From the **Tools** menu, select **Standards**.
2. Select **HIPAA Institutions** from the **X12 Standards** drop-down menu.
3. Click the **Display Institutions** button.

The **Find All HIPAA Institutions** window opens.
4. Click on the **Medicare** option and click the **Select** button.

You are returned to the **Standards Maintenance** window.
5. Click **Save**.

Importing HIPAA type qualifiers

The **HIPAA Type Qualifiers: Import** menu item is available from the **X12 Standards** menu in the **Standards Maintenance** window. The use of this option is described in the **Trading Manager Installation** documentation.

Adding an EDIFACT standard version

An EDIFACT version label consists of three required fields and one optional field:

- Message Version Number
- Message Release Number
- Controlling Agency
- Association Assigned Code (optional)

To add an EDIFACT standard version

1. From the **Tools** menu, select **Standards**.
2. Select **EDIFACT Message Version Numbers** from the **EDIFACT Standards** menu.

The **Standards Maintenance EDIFACT Message Version Numbers** window opens.

3. Enter a version number in the **Message Version No.** field.
4. Enter a description in the **Description** field.
5. Click **Save**.
6. Select **EDIFACT Message Version Numbers** from the **EDIFACT Standards** menu.
7. Enter a release number in the **Message Release No.** field.
8. Enter a description in the **Description** field.
9. Click **Save**.
10. Select **EDIFACT Controlling Agency** from the **EDIFACT Standards** menu.
11. Enter an abbreviation representing the version agency (such as the UN) in the **Controlling Agency** field.
12. Enter a description in the **Description** field.
13. Click **Save**.
14. (Optional) Select **EDIFACT Association Assigned Code** from the **EDIFACT Standards** menu.
15. Enter an abbreviation representing the association in the **Assoc Assign Cd** field.
16. Enter a description in the **Description** field.
17. Click **Save**.

Adding an EDIFACT partner ID code qualifier

You can add partner ID code qualifiers.

To add an EDIFACT partner ID code qualifier

1. From the **Tools** menu, select **Standards**.
2. Select **EDIFACT Partner ID Code Qualifiers** from the **EDIFACT Standards** menu.
3. The Standards Maintenance EDIFACT Partner ID Code Qualifiers window opens.
4. Enter a code in the **ID Code Qualifier** field.
5. Enter a description of the partner in the **Description** field.
6. Click **Save**.

Adding an EDIFACT functional ID or message type

Adding an EDIFACT Functional ID/Message Type requires that you first add an EDIFACT standard version, as described in "Adding an EDIFACT Standard Version" .

To add an EDIFACT functional ID or message type

1. From the **Tools** menu, select **Standards**.
2. Select **EDIFACT FuncIDMsgType** from the **EDIFACT Standards** menu.
The Standards Maintenance EDIFACT Functional ID and Message Types window appears.
3. Select a message version number from the **Msg Version No.** list.
4. Select a message release number from the **Msg Release No.** list.
5. Select a controlling agency number from the **Controlling Agency** list.
6. (Optional) Select an associate assigned code from the **Assoc Assign Code** drop-down list.

7. Enter an abbreviation representing a functional ID or message type in the **FuncID/MsgType** field.
8. Enter a description in the **FuncID/MsgType Description** field.
9. Click **Save**.

Adding an EDIFACT hex value

Each EDIFACT hex value supports up to three individual values, for example, 27 0D 0A, as shown in the following table. The EDIFACT hex values delivered with Partner Manager are as follows:

Hex	Value
1C	IS4 (File separator)
1D	IS3 (Group separator)
1E	IS2 (Record separator)
1F	IS1 (Unit separator)
20	Space character
27	Single quote character (')
27 0D 0A	Single quote-carriage return-line feed (^ CR LF)
2B	Plus sign (+)
2C	Comma character (,)
3A	Colon character (:)
3F	Question mark character (?)

To add an EDIFACT hex value

1. From the **Tools** menu, select **Standards**.
2. Select **EDIFACT Hex Values** from the **EDIFACT Standards** drop-down menu.
The Standards Maintenance EDIFACT Hex Values window opens.
3. Enter a hexadecimal value in the **Hex Value** field.
4. Enter a description in the **Description** field.
5. Click **Save**.

Deleting an EDIFACT standard

The following procedure describes how to delete the EDIFACT standards:

- Version
- Partner ID code qualifier
- Functional ID or message type

To delete EDIFACT standards

1. From the **Tools** menu, select **Standards**.
2. Select a standard type from the **EDIFACT Standards** drop-down menu.
3. Enter the standard type information or click the display button to select a standard.

For example, to delete a message version number:

- Click the **Display Message Version Numbers** button.
- Choose a version number and click **Select**.

4. Click the **Delete** button.

Adding and deleting TRADACOMS standards

This section describes how to add and delete X12 Standards.

Adding a TRADACOMS document type

The following procedure describes how to add a TRADACOMS document type.

To add a TRADACOMS document type

1. From the **Tools** menu, select **Standards**.
2. Select **Document Types** from the **TRADACOMS Standards** drop-down menu.
The Standards Maintenance window displays the TRADACOM information.
3. In the **Document Type** field, enter the document type you wish to add.
4. In the **Segment Versions** group box, enter the **Header**, **Trailer**, and **TAXCON Version** information assigned to this Document Type.

Note: The **TAXCON Version** is only enabled for **Invoice**, **Credit**, and **Utility Bill** types.

5. Enter the description in the **Description** field.
6. Click **Save**.

Editing a TRADACOMS document type

The following procedure describes how to edit an existing TRADACOMS document type.

To edit a TRADACOMS document type

1. From the **Tools** menu, select **Standards**.
The Standards Maintenance window appears.
2. Select **Document Types** from the **TRADACOMS Standards** drop-down menu.
The Standards Maintenance window displays TRADACOM fields.
3. Click the **Display Document Types** button.
The **Find All TRADACOMS Document Types** window appears.
4. Choose a document type, and then click **Select**.
5. Edit the data fields as needed.

Note: The **TAXCON Version** is only enabled for **Invoice**, **Credit**, and **Utility Bill** types.

6. Click **Save**.

Deleting a TRADACOMS document type

The following procedure describes how to delete a TRADACOMS document type.

To delete a TRDAOCOMS document type

1. From the **Tools** menu, select **Standards**.
2. Select **Document Types** from the **TRADACOMS Standards** drop-down menu.
3. Click **Display Document Types**.
4. The **Find All TRADACOMS Document Types** dialog box displays.
5. Choose a document type and click **Select**.

6. Your selection appears in the **Document Type** field.

Note: The remaining fields will automatically fill in after selecting the document type.

7. Click **Delete**.

Database utilities

The **Database Utilities** contains the following:

- Merge
- Purge

Merge

Note: If user security is enabled, the user must have the following privileges to run the merge: **Folder Maintenance, Create Trading Partner, Create Application Partner, Create Folders, Create Inbound and Outbound Links** and **Create Post Offices**.

Partner Manager enables you to merge one database to another database. For example, this feature enables you to merge selected objects in a source test database into a destination production database.

The source database is the database currently open in Partner Manager and specified in the Data Source Name (DSN) profile. The information you can merge into the destination database includes Trading Partners, Trade Links, and Post Offices.

Note: To verify the current profile information, including DSN information, select **About Partner Manager** from the **Help** menu.

To merge a database into another database

1. From the **Tools** menu, select **Merge to Another DB**.
The Merge: Select Destination Database window is displayed.
2. Select an existing profile or DSN.

Note: If you have not entered a profile to select, then enter the User ID, Password, Database (if not Oracle), and Database Vendor.

3. Click **Next**.
4. Select an option from the Merge Option dialog box:
5. Click **Begin Merge**.
6. Follow the merge wizard instructions and click **Finish**.

The wizard varies slightly different depending on the item you select to merge. A message appears upon successful completion.

Note: The next time you perform a database merge, Partner Manager keeps the most-recently selected destination database as the default destination database.

Details on merging trade links

The merge function is useful for transferring information from a test environment to a production environment.

The **Inbound Trade Link** and **Outbound Trade Link** merge functions for X12 and EDIFACT transfer all Trade Link data to another database.

The functions also merge dependent information, such as Folders, Trading Partners and Application Partners (From, To, and Acknowledgement Partners), Post Offices, Contacts, and any Standards needed (EDIFACT, X12, Functional IDs, and Transaction Sets). Carefully review the initial and final analysis messages to ensure the Trade Link merged as you expected.

- The merge functions do not overwrite existing information; information is appended to destination databases. If the destination database has information in it that is identical to the source database, that information is not included in the merge from the source database. This feature allows you to transfer test Trade Links and related information before implementing them.
- Because the merge functions never overwrite information, you can add information to a copy of a production database, test it, and then **merge the new information only** to the production database.
- Review the initial and final analysis messages carefully on the Select to Merge dialog box to insure the accuracy of the merging databases; this dialog box provides Merge Analysis information about what specifically is to be merged.
- The EDIFACT Trade Link merge does not have the ability to merge a trade link that exists in the destination database.

Post Office and Trading Partner merge details

- Partner Manager does not complete a Post Office merge if the destination database contains a Post Office with the same **Name** or **Nickname**.
- Trading Partners merge their associated Application Partner information in the destination database.
- If the Trading Partner exists in the destination database but the associated Application Partner does not, the Application Partner is merged in the destination database.
- Partner Manager also creates any folders or subfolders you have created in the source database in the destination database. If the folder name exists in the destination database but is a different folder type than the source, Partner Manager merges the folder data in the appropriate folder. For example, data in a source X12 internal folder named **Track** is not merged into the destination X12 external folder named **Track**. Instead, Partner Manager merges the data into the default destination X12 *internal* folder **Internal X12**.

Purge

Use the following instructions to purge traffic and/or Partner Manager Log data. To purge data, open the Purge/Archive Traffic Reports window as follows

To open the Purge/Archive Traffic Reports window

1. Click the **Utilities** icon in the Partner Manager toolbar.
2. Select **Database > Purge** in the **Utilities** navigator to open the window.

Purging traffic or transmission data

To purge traffic or transmission data

1. With the Purge/Archive Traffic Reports window open, select the **Purge (Permanent Delete) Current Tables** button.
2. Select the type of data to be permanently deleted.

- To permanently delete traffic data, continue with the next step.
 - To permanently delete transmission data, select the **Purge Transmission Data** check box.
3. All records will be purged before the date displayed in the **Purge/Move All Before this Date** field. If you want to choose a different date than the one displayed, open the calendar by clicking the arrow to the right of the field and select a new date.

Note: All records dated *before* this date will be purged.
 4. Click **Begin Purge/Archive**. A message box opens that informs you that the purge is permanent and asks if you want to continue.
 5. Click **Yes**.

Archiving batch traffic

To archive batch traffic

1. With the Purge/Archive Traffic Reports window open, click the **Configure** button located in the **Batch Traffic Archive** area of the window.

The Message Manager Configuration window opens with the **Traffic Batch Archiving** tab view displayed.
2. Check the **Enable Batch Traffic Archiving** check box.
3. Enter the number of days that the archive is to be kept. You can enter any integer between 1 and 365 (inclusive).

If you want to move *all* traffic to the online archive, enter 0 in the **Days to Keep** field. If you do not want to do this, continue with the next step. If you enter 0 the **Days to Keep Warning** will open which asks you to confirm your selection.
4. Click **Save** to close the Message Manager Configuration window and return to the Purge/Archive Traffic Reports window.

The number of days that the archive is to be kept is displayed in the window.

Folders

The **Folder Utilities** facility enables you to organize trading partners in subfolders under the main Address Book **Internal** and **External** folders.

Partner Manager enables you to add, rename, move, and delete internal and external X12 subfolders.

You may not delete or rename main folders. When you delete a subfolder, it deletes all objects (trading and application partners, contacts, transaction sets, and so on) in the subfolder.

Adding a subfolder

To add a subfolder to a main folder

1. From the **Tools** menu, select **Folder Utilities**.

The Folder Utilities window opens.
2. Select a folder.
3. Click **Add Sub Folder**.

The Folder Maintenance dialog box opens.
4. Enter a name in the **Folder Name** field.

Note: The name can be a maximum of 32 characters.

5. Click **Save**.

The new subfolder appears in the **Folder Utilities** list and the **Address Book** navigator.

Renaming a subfolder

To rename a subfolder

1. From the **Tools** menu, select **Folder Utilities**.

The Folder Utilities dialog box appears.

2. Select a subfolder.
3. Click **Rename**.

The Rename Folder dialog box appears.

Note: The name can be a maximum of 32 characters.

4. Change the folder name in the **Folder Name** field.
5. Click **Save**.

The folder is renamed.

Moving a subfolder

Moving a subfolder moves all objects (trading and application partners, contacts, transaction sets, and so on) in the subfolder.

Note: If the subfolder does not contain any trading partners, it cannot be moved.

To move the contents of one subfolder to another

1. From the **Tools** menu, select **Folder Utilities**.

The Folder Utilities dialog box appears.

2. Select a subfolder.
3. Click **Move**. The Move Folder dialog box appears.
4. Enter an existing subfolder name in the text box and click **OK**.

A message informs you that the move was successful.

5. Click **OK**.

Deleting a Subfolder

When you delete a subfolder, it deletes all objects (trading and application partners, contacts, transaction sets, and so on) in the subfolder.

To delete a subfolder

1. From the **Tools** menu, select **Folder Utilities**.

The Folder Utilities dialog box appears.

2. Select a subfolder.
3. Click **Delete** and confirm the delete action when prompted.

Security

The Security utility contains the following:

- "Security Groups"
- "Security Parameters"
- "User Maintenance"
- "Prior Version Password Remover"

Changing passwords

You can change the password of the current user. This option is only available if security is in force; it is disabled until a valid user logs into Partner Manager.

Preventing easily guessed passwords

Passwords containing the user name and the words *secret* and *password*, *pass* and *word* will be not be accepted as valid passwords. For example, if the user name were Fred, a password of *123Fred123* would be rejected as it contains the user name. This check will only be performed on newly entered passwords. Passwords converted from prior versions will not be subject to this restriction.

Changing your password

The following steps describe how to change passwords

To change your password

1. From the **Tools** menu, select **Security > Change Password**.
The **Partner Manager Change Password** dialog box opens.
2. Complete the fields in the dialog box. See "Preventing Easily Guessed Passwords" before changing a password.
3. Click **OK**.
A message box opens that tells you that the password has been changed.
4. Click **OK**.
The password is changed.

Security groups

Partner Manager enables you to define groups with security permission attributes and assign users to those groups. Assigned users log into Partner Manager.

Note: From the **Help** menu, select **About Partner Manager** to view the current **User ID** and **Security Group**.

Defining security groups enables you to configure default sets of permissions that you can then assign to one or more Partner Manager users. You can use the security profiles provided, or adjust the access selections to fit your needs.

You can add, edit, and delete security groups. You then define and add users to security groups.

Partner Manager provides three suggested levels of group permissions. You can use the following as a template for your security needs:

- **Administrator** - Provides full permission to security, purge and archive, EDI wizard, access, create, edit, and resend functions

- **Power User** - Provides **Administrator** permissions, except for security and purge/archive functions
- **Read Only** - Provides access-only permissions for Trading Partner, Application Partner, Post Offices, Inbound Trade Links, and Outbound Trade Links information

Adding a new security group

Adding a security group defines permissions for users that belong to that security group. At least one user must be added to a new security group before the security group can be used.

To add a new security group

1. From the **Tools** menu, select **Security** → **Security Groups**.
The Security Group Maintenance window appears.
2. In the **Group ID** field, enter the new security group name (up to 10 characters).
3. Press **Enter**.
A confirmation dialog box appears.
4. Click **Yes** to create the new security group.
5. (Optional) In the **Group Desc.** field, enter a description for the group.
6. Define the security group permissions by clicking a **Security Profiles** button: **Administrator**, **Power User**, or **Read Only**.
7. The default settings for the category are enabled.

Note: Click **Clear All** to clear all permissions currently enabled.

8. To customize the permissions, enable or disable the check boxes for access settings.
9. Click **Save** to create the group.

Editing security group settings

Existing security groups can be modified.

To edit security settings for an existing group

1. From the **Tools** menu, select **Security** → **Security Groups**.
The Security Group Maintenance dialog box appears.
2. Select the group ID for the existing group from the **Group ID** drop-down list.
Edit the permissions for this security group.
3. Click **Save**.

Deleting a security group

All users assigned to the security group must be deleted prior to deleting the security group.

To delete an existing security group

1. From the **Tools** menu, select **Security** → **Security Groups**.
The Security Group Maintenance dialog box appears.
2. Select the security group from the **Group ID** drop-down list.
3. Click **Delete**.
A delete confirmation dialog box appears.

4. Click **Yes**.

Security parameters

This section describes how to set the various Partner Manager security parameters using the Security Parameters window.

To set security parameters

1. From the **Tools** menu, select **Security** → **Security Parameters**.

The Security Parameters window opens.

2. If you want to enforce use of a password that consists of a minimum number of characters, enable the **Enforce Minimum Password Length** check box.

The **Minimum Length** field will become active and a default value will be displayed in the field. You can change the default value. The system will then detect existing passwords that do not meet the minimum length requirement.

Note: If you leave the field blank (check box disabled) any password length, including zero, will be valid. (See "Preventing Easily Guessed Passwords" before selecting a password.)

3. If you want to force a user to be locked out after a number of invalid logon attempts, enable the **Enforce Maximum Invalid Logins** check box.

The **Maximum Invalid Attempts** field will become active and a default value will be displayed in the field.

- You can change the default value. The system will then lock out any user entering invalid logons for the specified number of times.
- When the **Enforce Maximum Invalid Logins check box is enabled**, the **Log Accounts Locked Out** check box is active (not grayed out). When enabled, this check box will cause accounts logged out data to be written to the Partner Manager Log File. If you do not want the accounts logged out to be logged, disable this check box.

4. If you want to log all security procedures in the Partner Manager log, enable the **Log All Security Maintenance** check box.

Note: The security procedures logged include: creating and maintaining user ids, security groups, security parameters, and changing password.

5. If you want to log all user logon activity in the Partner Manager log, enable the **Log All Logon Activity** check box.

When this option is selected the Partner Manager log will record all user logon and logoffs, as well as record whenever invalid logon attempts occur.

6. If you want to activate the Password History option, enable the **Enforce Password History** check box.

The By user, prevent the following number of passwords from being used field will be enabled.

- Enter a value in the field. The default value of the field is 4, and must be a value greater than 1. When a user changes his or her password, the system will prevent the new password from being the same as the last number of passwords specified in this field.

7. Click **Save**.

A message box opens that informs you that Security Parameters have been successfully updated

8. Click **Ok**.

The message box closes and the parameters are saved.

User maintenance

User permissions are defined in the security group permissions. Selecting the **Group ID** on the **User Information** dialog box assigns the user to a specific security group.

A user definition consists of:

- User ID (for logon)
- User Name (optional description)
- Password
- Confirm Password
- Group ID
- Password options

You can add, edit, and delete users. The Change Password feature allows users to change their password.

Adding a user to a security group

To create a user, enter his/her name, password, password expiration rules, and select the Security Group to define the user's permissions.

Note: From the **Help** menu, select **About Partner Manager** to view the current **User ID** and **Security Group**.

To add a user to a security group

1. From the **Tools** menu, select **Security** → **User Maintenance**.
The Security Users window opens.
2. Click **Add**.
The User Maintenance: Add window opens.
3. Enter the **User ID** for the new user.
4. Enter a **Group ID**.

Note: The **User ID** and **Group ID** fields are required fields. All others are optional. Complete the following steps if desired. If not continue with step 10.

5. In the **User Name** field, enter a description for the user.
6. In the **Password** field, enter a password for the user. (See "Preventing Easily Guessed Passwords" before selecting a password.)
7. If you entered an optional password, enter the password again in the **Confirm Password** field.
8. Select a **Group ID** to assign this user to a security group.
9. Select any desired password options.
 - If you want to force the user to change their password at the next logon, enable the **User Must Change Password at Next Logon** check box.
 - If you want to disable the user's ability to change passwords, enable the **User Cannot Change Password** check box.
 - If you want to disable the account, enable the **Account is Disabled** check box.

- If you want to select a number of days for password expiration, click **Password expires every:** and enter a number of days in the **days** field.
10. Click **Save**.
You are returned to the Security Users dialog box and the new user is added to the list.

Editing a user

You can edit information about a user.

To edit an existing user

1. From the **Tools** menu, select **Security** → **User Maintenance**.
The User Information dialog box appears.
2. Select a User ID from the User ID drop-down list.
3. You can edit the password for this user or select a different security group from the **Group ID** drop-down list.
4. Click **Save**.

Deleting a user

You can delete users. You must delete users before deleting the security group they belong to.

To delete an existing user

Note: Deleting the last user in Partner Manager disables all user and group security.

1. From the **Tools** menu, select **Security** → **User Maintenance**.
The User Information dialog box appears.
2. Select a **User ID** from the **User ID** drop-down list.
3. Click the **Delete** button.
A confirmation dialog box appears.
4. Click **Yes** to confirm the delete of the user.

User login with security

After you configure security groups and add users, exit Partner Manager. When the Partner Manager application is restarted, the Partner Manager User Login dialog box appears.

To start Partner Manager with security:

1. Start the Partner Manager application.
The Partner Manager User Login dialog box appears.
2. Enter a valid **User ID**.

Note: The next step is valid only if you configured a Password with the User ID.

3. Enter a valid Password.
4. Click **OK**.

To log in as another user from within Partner Manager:

1. From the **File** menu, select **Login as another User**.

- The **Partner Manager** Login dialog box appears.
2. Enter a valid **User ID**.
 3. (Option) Enter a valid **Password**.
 4. Click **OK**.

Prior version password remover

You can remove prior Trading Manager passwords from the Windows registry by using the Prior Version Password Remover.

To remove old passwords

1. Choose the **Utilities** icon from the Partner Manager toolbar, then select **Utilities** > **Prior Version Password Remover** from the **Utilities** navigator.
The Prior Version Password Remover window opens.
2. Click **Begin** to start the Windows registry search for prior passwords.

Note: This process may take several minutes.

When the process completes, passwords are cleared.

3. Click **Cancel**.

Chapter 9. EDI Wizard

The EDI Wizard creates type trees used by the Message Manager during the processing of your inbound and outbound data, therefore, it must be run before the Message Manager is built the first time. After you have defined your inbound and outbound trade links in your initial implementation, run the EDI Wizard to create the type trees.

Whenever a new transaction set or an existing transaction set for a new version of the standard is added, run the EDI Wizard again to update the definitions of the data to be recognized by the Message Manager.

EDI standard type trees

The EDI Wizard creates the following EDI standard type trees:

- **x12user.mtt** (X12 and EDIFACT): You can use the type tree in your application maps. If you have both X12 and EDIFACT data, two trees will be generated: **x12user.mtt** and **edifuser.mtt**. These type trees contain all the definitions for the EDI data processed by the Message Manager for all transaction sets for all versions of the standard required for the trade links that are defined.
- **x12mail.mtt** (X12) and **edifmail.mtt** (EDIFACT): Message Manager uses these type trees. They are referenced by a series of the Message Manager maps. When the EDI Wizard generates these type trees, they are placed in the same directory as the Message Manager maps and trees.
- **EDI Mail Trees:** The EDI Wizard will create both **x12mail.mtt** (X12) and **edifmail.mtt** (EDIFACT) trees if you have the trees for these standards. Message Manager uses these type trees. They are referenced by a series of Message Manager maps. When the EDI Wizard generates the type trees, it is placed in the same directory as the Message Manager maps and trees.
- **EDI User Trees:** You can use the type tree in your application maps. The EDI Wizard will create both X12(**x12user.mtt**) and EDIFACT (**edifuser.mtt**) trees if the 'Create User Trees' option is selected. This type tree contains all the definitions for the EDI data processed by the Message Manager for all transaction sets for all versions of the standard required for the trade links that are defined. These trees are created in the same directory as the Message Manager maps and trees.

Note: The EDI Wizard will not create TRADACOMS trees.

Running the EDI Wizard

The EDI Wizard creates type trees from Trade Link definitions.

To run the EDI Wizard

1. Select **EDI Wizard** from the **Wizard** menu on the toolbar.
The Type Tree Wizard dialog box appears.
2. Click **Next**.
3. Click **Next** to begin to create the customized EDI type trees.
4. Follow the wizard instructions to create your type tree.

Where the Type Trees are located

The wizard prompts you to:

- Search the trading relationships defined in the Partner Manager.
- Enter the location of the type trees used to create the standard EDI type trees and searches for these trees.
- Enter the location and file name for the new type trees. When you first run the wizard, accept the default type tree names.

When prompted to specify a directory for new Message Manager Standard type trees, choose the directory where the Message Manager source maps and type trees are located. If you choose a different directory and attempt to create the type tree, a dialog box displays alerting you to this fact and asking you to confirm that you want to create this type tree in the specified directory.

If you have X12 trade links, the EDI Wizard will create the **x12mail.mtt** type tree in the specified directory.

If you have EDIFACT trade links, the EDI Wizard will create the **edifmail.mtt** type tree in the specified directory.

Note: if you are using a message version 90 (release 1), which contains the INVOICE and ORDERS messages, you must select the **edif90_1_contrl.mtt** type tree when using the EDI Wizard to create the **edifmail** tree. Users who do not have message version 90 (release 1) messages need to use the **edifiso9735-4.mtt** when using the EDI Wizard to create the **edifmail** tree.

After the Wizard is finished, it displays a message that the customized type trees have been created.

After a new **x12mail.mtt** (X12) and/or **edifmail.mtt** (EDIFACT) type tree is created, you must redeploy both Trading Manager and Message Manager run maps. See Step 13 in Chapter 5 of the *Trading Manager Installation and User Guide* for instructions on this procedure.

When the EDI Wizard cannot locate a type tree

When the EDI Wizard cannot locate a type tree for a version that is needed, it displays a dialog box showing the type trees that it could not find. It is recommended that you cancel the wizard, install or re-locate the requested type trees, and then restart the wizard.

However, you can generate an incomplete type tree and add the other types manually. It is highly recommended that expert users perform the type tree modification only when a version of the requested type tree is not available. If you do select to continue to generate the type tree, a dialog box appears asking you to confirm creation of an incomplete type tree.

It should be noted that if you generate an incomplete type tree, you must manually add the types representing the transaction sets for the versions of the standard type trees that could not be found, before building the Message Manager maps.

When more than one type tree is found for a version

When the wizard locates more than one type tree for a particular version of the standard, it displays a dialog box listing those trees.

How to continue

1. Select the appropriate type tree.
2. Click **Next**.

When possible, use the original version of the standard trees that are installed for the type trees.

Chapter 10. Database copy utility

The Database Copy Utility copies an existing Partner Manager Database to an empty (newly created) database. The newly created database can be a copy of **M4EC_Empty.mdb**, or a database created by ***inst.sql** scripts that ship with Partner Manager. This copy can be run with a transaction or without a transaction.

It should be noted that the default setting is within a transaction.

The **Run Copy Without Transaction Control** check box should only be enabled if the source database is very large and is causing **LogFile** full errors. If an error occurs when running without a transaction, no rollbacks occur. You must start over with an empty database.

The Database Copy Utility is accessed from the **Start** menu.

To start the Database Copy Utility

1. From the **Start** menu, click **Programs IBM WebSphere Transformation Extender n.n → Trading Manager** then **Database Copy Utility**.

The Partner Manager Copy Utility dialog box opens.

Copying databases

The Database Copy Utility enables you to copy an existing Partner Manager database to another empty database.

The empty database can be the **m4ec_empty.mdb** file or a newly created database created by the ***inst.sql** script files (both files are installed as part of Trading Manager).

This copy may be run without transaction control enabled if the source database is very large. If an error occurs when executing the database copy, and transaction control is not enabled, and no rollbacks occur; you must start over and create a new empty database (using the database drop, inst, and load scripts) or copy the **m4ec_empty.mdb** file (this file is valid for Microsoft Access database files only).

Database scripts

Run the ***drop**, ***inst**, and ***load** scripts on the database or for **Access** make another copy of **M4EC_Empty.mdb**.

*drop scripts

These **.sql** files are installed in the *install_dir\tmgr_vn.n\pmgr\sql* directory:

- **db2dropnm.sql**
- **oradropnm.sql**
- **sqldropnm.sql**
- **sybasedropnm.sql**

***inst scripts**

These .sql files are installed in the *install_dir \tmgr_vn.n\pmgr\sql* directory:

- **db2instnn.sql**
- **orainstnn.sql**
- **sqlinstnn.sql**
- **sybaseinstnn.sql**

***load scripts**

These .sql files are installed in the *install_dir \tmgr_vn.n\pmgr\sql* directory:

- **db2loadnn.sql**
- **orainstnn.sql**
- **sqlinstnn.sql**
- **sybaseinstnn.sql**
- **sybaseinstnn_2.sql**

Chapter 11. Managing traffic data

Partner Manager enables you to archive and purge the traffic record data in your Partner Manager database. (These records represent the Partner Manager e-commerce traffic.) Larger databases may slow down processing and result in unmanageable numbers of entries in each traffic report.

Partner Manager provides the following information management options that enable you to:

- Purge data from the Current traffic tables
- Purge data from the Online Archive traffic tables
- Archive data from the Current traffic tables to the Online Archive tables
- Archive data from the Current traffic tables to the zip file archives
- Archive data from the Online Archive tables to the zip file archives
- Restore data from a zip file archive

Partner Manager provides the following information management options:

Option	Description
Purge (Permanent Delete) Current Tables	Permanently deletes traffic records before a specified date from the Partner manager database. These records cannot be restored.
Move to On-Line Archive	Places traffic records before a specified date in the Archive tables in the Partner Manager database. The records are then purged from the current Traffic tables.
Move to Current to Off-Line Zip File	Stores traffic records before a specified date in a zip file. These records are then purged from the current Traffic tables.
Move On-Line Archive to Off-Line Zip File	Stores traffic records before a specified date from the Archive tables in the Partner Manager database in a zip file. These records are then purged from the Archive tables.
Purge (Permanent Delete) of On-Line Archive	Permanently deletes traffic records before a specified date from the Archive tables in the Partner Manager database. These records cannot be restored.
Restore Zip File	Restore files archived in a compressed zip file using the Move to Current to Off-Line Zip File or Move On-Line Archive to Off-Line Zip File features.

Purging current traffic or online archive data

This procedure permanently deletes traffic data from the **Current** traffic database tables.

Note: If the **Purge (Permanent Delete) Current Tables** or the **Purge (Permanent Delete) of Online Archives** purge option is enabled, a **Purge Transmission**

Data check box is available. Enable the **Purge Transmission Data** check box to permanently delete the transmission archive of interchange data. This transmission archive folder is defined in the **Directories** → **Archive** field of the Server Directory Configuration Maintenance utility.

Before purging data, see the Check the Traffic Table Report Count section for information about traffic table counts.

To permanently delete current traffic information

1. From the **Tools** menu, select **Purge**.
2. The Purge/Archive Traffic Reports dialog box appears.
3. Enable one of the following options:
 - Purge (Permanent Delete) Current Tables
 - Purge (Permanent Delete) of Online Archives
4. Click the **Calendar** button to select a date.
5. Click a date in the Calendar dialog box.

All traffic records before but not including this date are permanently deleted from the Partner Manager tables.

Note: To quickly purge all records, add a future date.

6. Click **Select**.
7. Click **Begin Purge/Archive**.
8. Click **Yes** to confirm the purge action.
9. As the traffic records are being deleted from the Partner Manager database, the current task displays in the **Purge Status** area. After the purge process is completed, a dialog box appears identifying the number of records purged.
10. Click **Cancel** to close the Purge dialog box.

Check the traffic table report count

This procedure enables you to check the number of traffic reports to determine whether you need to purge data. The Traffic Report Counts window shows the current number of reports by type using the actual database table name.

The following lists the database table name to the report name available from the **Reports** navigator. Any table name that includes the word **Archive** (such as **ECAAlertArchive**) shows the number of traffic reports in the traffic data archive.

Database Table Name	View in Traffic Reports
ECAAlert	Traffic Alert
ECICStatus	Data Type View
EDF_Status_IC	EDIFACT Interchanges
EDF_Status_FG	EDIFACT Functional Groups
EDF_Status_Msg	EDIFACT Messages
EDF_Status_SegErr	EDIFACT Segment Errors
EDF_Status_DEErr	EDIFACT Data Element Errors
X12DEError	X12 Data Element errors; if these errors exist, they are shown in the traffic reports segment error views. See Traffic Reports.

Database Table Name	View in Traffic Reports
X12FGStatus	X12 Functional Groups
X12ICStatus	X12 Interchanges
X12SegError	X12 Segment errors; if these errors exist, they are shown in the Reports navigator under Transmissions. See Reports Navigator Overview.
X12TSStatus	X12 Transactions
MapStatus	Transmissions
TRCICStatus	TRADACOMS interchanges
TRCDocHeader	TRADACOMS document header
TRCDocBody	TRADACOMS document body
TRCSegError	TRADACOMS document segment errors
TRCDEError	TRADACOMS document data element errors

To check the traffic table report count

1. From the **Tools** menu, select **Purge**.
The Purge/Archive Traffic Reports dialog box appears.
2. Click the **Traffic Counts** button.
The Traffic Report Counts window appears.
3. Use the scroll bar to show the archived report information.
Click **Copy** to move the information to your Windows clipboard. You can paste this data into any Windows application that accepts clipboard text.
4. Click **OK** to close the window.

Archiving traffic data

The following sections describe how to archive Partner Manager traffic data. Partner Manager enables you to:

- Archive data from the Current traffic tables to the Online Archive tables
- Archive data from the Current traffic tables to the zip file archives
- Archive data from the Online Archive tables to the zip file archives

Archiving data from the current traffic tables to the online archive tables

To move current traffic information to an online archive

1. From the **Tools** menu, select **Purge**.
The Purge/Archive Traffic Reports dialog box appears.
2. Enable **Move to On-Line Archive**.
3. Enter a date in any valid date format in the **Purge/Move All Before This Date** field or click **Calendar** to select a date.
All traffic records before but not including this date are moved to the online archive tables.
4. Click **Begin Purge/Archive**.
5. Click **Yes** to confirm the move action.

As the traffic records are being archived into the archive tables and purged from the current tables, the current task is displayed in the **Purge Status**. After the process is completed, a dialog box appears identifying the number of records archived.

6. Click **Cancel** to close the Purge dialog box.

Moving data from the current traffic tables to a zip file

To move current traffic information to a zip file

1. From the **Tools** menu, select **Purge**.
The Purge/Archive Traffic Reports dialog box appears.
2. Enable the **Move to Current to Off-Line Zip File** option button.
3. Enter a date in any valid date format in the **Purge/Move All Before This Date** field or click **Calendar** to select a date.
All traffic records before but not including this date are moved to the online archive tables.
4. Click **Begin Purge/Archive**.
5. Click **Yes** to confirm.
The Select/Enter Zip File Destination dialog box appears.
6. Enter a zip file archive file name and click **Open**.
7. The default name is **PartnerMgrCCYYMMDD.zip**, where *CCYYMMDD* represents the date you selected in Step 3.
8. As the traffic records are being archived into the zip files and purged from the current tables, the current task is displayed in the **Purge Status**. After the process is completed, a dialog box appears identifying the number of records archived.
9. Click **Cancel** to close the Purge dialog box.

Moving data from the online archive tables to a zip file

To move archived traffic information to a zip file

1. From the **Tools** menu, select **Purge**.
2. The Purge/Archive Traffic Reports dialog box appears.
3. Enable **Move On-Line Archive to Off-Line Zip File**.
4. Enter a date in any valid date format in the **Purge/Move All Before This Date** field or click **Calendar** to select a date.
All traffic records before but not including this date are moved to the online archive tables.
5. Click **Begin Purge/Archive**.
6. Click **Yes** to confirm.
The Select/Enter Zip File Destination dialog box appears.
7. Enter a zip file archive file name and click **Open**.
The default name is **PartnerMgrCCYYMMDD.zip**, where *CCYYMMDD* represents the date you selected in Step 3.
8. As the traffic records are being archived into the zip files and purged from the current tables, the current task is displayed in the **Purge Status**. After the process is completed, a dialog box appears identifying the number of records archived.
9. Click **Cancel** to close the Purge dialog box.

Restoring traffic data from a zip file

To restore traffic data from a zip file

1. From the **Tools** menu, select **Purge**.
The Purge/Archive Traffic Reports dialog box appears.
2. Enable **Restore Zip File**.
3. Enter the name of the zip file containing the traffic information to be restored.
Click **Find Zip** to browse for the full file name and path of the zip file.
The default zip file name when files are archived is **PartnerMgrCCYYMMDD.zip**, where *CCYYMMDD* represents the date.
4. Click **Begin Restoration of Zip File** to begin restoring the data.
The Purge/Archive Traffic Reports dialog box shows the records being restored.
After the process is completed, a dialog box shows that the restore was completed successfully and the number of database tables that were processed.
5. Click **Yes** to delete the zip file from which the traffic records were restored or click **No** to keep the file and return to the Purge/Archive Traffic Reports dialog box.
If you selected to delete the zip file, a dialog box appears confirming the deletion of that file.
6. Click **OK** to return to the **Purge/Archive** Traffic Reports dialog box.
7. Click **Cancel** to close the Purge dialog box.

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