

SeeBeyond™ eBusiness Integration Suite

e*Xchange Partner Manager User's Guide

Release 4.5.1



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Introduction

This user's guide provides instructions and background information for all users of the e*Xchange Partner Manager application. It covers all aspects of setting up, operating, and maintaining e*Xchange Partner Manager.

1.1 Intended Audience

This book assumes the reader is familiar with the Microsoft Windows NT operating system and standard graphical user interface (GUI) concepts. It also assumes familiarity with the eBusiness protocols used by your company and your trading partners.

Some parts of the book are for all users, and some parts are intended only for the administrator or other person who will be performing certain setup procedures. A user with restricted security rights cannot access certain parts of the user interface. However, this book covers the entire e*Xchange Partner Manager application, and provides procedures for all users.

1.2 Compatible Systems

Windows Systems—The SeeBeyond™ eBusiness Integration Suite is fully compliant with Windows NT and Windows 2000 platforms. When this document references Windows, such statements apply to both Windows platforms.

UNIX Systems—This guide uses the backslash (“\”) as the separator within path names. If you are working on a UNIX system, please make the appropriate substitutions.

Note: *The SeeBeyond eBusiness Integration Suite is fully compatible with Compaq Tru64 Version 4.0f.*

1.3 Organization of Information

The e*Xchange™ Partner Manager User's Guide includes the following information:

Chapter	Contents
List of Tables	A complete list of all the tables in the <i>e*Xchange Partner Manager User's Guide</i> .
List of Figures	A complete list of all the figures (illustrations and diagrams) in the <i>e*Xchange Partner Manager User's Guide</i> .
Chapter 1, Introduction	Introduction to the various applications included in the SeeBeyond eBusiness Integration Suite and the components of each.
Chapter 2, Getting Started	Instructions for logging in. Overview of the user interface including menus, toolbars, icons, properties windows, the status bar, and user preference settings.
Chapter 3, e*Xchange Partner Manager Administration	Instructions for completing various administrator functions such as Partner Manager Envelope Setup and Inner Envelope Definition Setup. Instructions for setting system defaults.
Chapter 4, Storing Contact Information	Instructions for creating and maintaining contact information at all levels.
Chapter 5, Tracking Notes and Action Items	Instructions for creating and maintaining notes and action items at all levels.
Chapter 6, Assigning Access Privileges to Trading Partner Profiles	Instructions for specifying which users and user groups will have access to components and tailoring the access rights that they will have.
Chapter 7, Setting Up and Using the Company and Trading Partner Components	Instructions for setting up the Company and Trading Partner component levels.
Chapter 8, Setting Up X12 Outer and Inner Envelopes	Instructions for setting up the extended attributes and other information necessary for processing X12 transactions.
Chapter 9, Setting Up RosettaNet Outer and Inner Envelopes	Instructions for setting up the extended attributes and other information necessary for processing RosettaNet message structures.
Chapter 10, Setting Up UN/EDIFACT Outer and Inner Envelopes	Instructions for setting up the extended attributes and other information necessary for processing UN/EDIFACT transactions.
Chapter 11, Tracking Messages	Detailed instructions for using the Message Tracking dialog box.
Chapter 12, Report Maintenance	Instructions for using the reports feature.

Chapter	Contents
Chapter 13, Web Interface: Overview and Administration	Instructions for logging in to the e*Xchange Partner Manager Web interface and for using the System Administration and User Administration functions.
Chapter 14, Web Interface: Profile Management	Instructions for setting up and working with trading partner profiles, including all the attributes needed to send and receive eBusiness messages.
Chapter 15, Web Interface: Message Tracking	Instructions for using the Message Tracking features of the Web interface.
Appendix A, eBusiness Protocol Support	Information on how eBusiness protocols are supported by e*Xchange, including the extended attributes and Collaborations provided to support these protocols.
Appendix B, Using the Validation Rules Builder	An overview of the Validation Rules Builder tool, instructions on converting EDI implementation guides and loading them into e*Gate™, and troubleshooting information.
Appendix C, e*Xchange Partner Manager Database Tables	An explanation of the message tracking database tables, with information on each column in each table.
Glossary	Definitions of technical terms specific to the e*Xchange Partner Manager, as well as some industry terms.
Index	An index to the guide.

1.4 Writing Conventions

The writing conventions listed in this section are observed throughout this document.

Hypertext Links

When you are using this guide online, cross-references are also hypertext links and appear in **blue text** as shown below. Click the **blue text** to jump to the section.

For information on these and related topics, see **[“Parameter, Function, and Command Names” on page 4](#)**.

Command Line

Text to be typed at the command line is displayed in a special font as shown below.

```
java -jar ValidationBuilder.jar
```

Variables within a command line are set in the same font and bold italic as shown below.

```
stcregutil -rh host-name -rs schema-name -un user-name  
-up password -ef output-directory
```

Code and Samples

Computer code and samples (including printouts) on a separate line or lines are set in Courier as shown below.

```
Configuration for BOB_Promotion
```

However, when these elements (or portions of them) or variables representing several possible elements appear within ordinary text, they are set in *italics* as shown below.

path and *file-name* are the path and file name specified as arguments to **-fr** in the **stcregutil** command line.

Notes and Cautions

Points of particular interest or significance to the reader are introduced with *Note*, *Caution*, or *Important*, and the text is displayed in *italics*, for example:

Note: The Actions menu is only available when a Properties window is displayed.

User Input

The names of items in the user interface such as icons or buttons that you click or select appear in **bold** as shown below.

Click **Apply** to save, or **OK** to save and close.

File Names and Paths

When names of files are given in the text, they appear in **bold** as shown below.

Use a text editor to open the **ValidationBuilder.properties** file.

When file paths and drive designations are used, with or without the file name, they appear in **bold** as shown below.

In the **Open** field, type **D:\setup\setup.exe** where **D:** is your CD-ROM drive.

Parameter, Function, and Command Names

When names of parameters, functions, and commands are given in the body of the text, they appear in **bold** as follows:

The default parameter **localhost** is normally only used for testing.

The Monk function **iq-put** places an Event into an IQ.

You can use the **stccb** utility to start the Control Broker.

1.5 Supporting Documents

The following documents support the e*Xchange Partner Manager. You can find these documents in the **\eGate\client\docs** folder for your e*Gate installation, or on the **\docs** folder on the installation CD.

- *e*Xchange Partner Manager Release Notes*
- *e*Xchange Partner Manager Installation Guide*

- *e*Xchange Partner Manager Implementation Guide*
- *e*Xchange Partner Manager User's Guide*
- *RosettaNet ETD Library User's Guide*
- *ASC X12 ETD Library User's Guide*
- *UN/EDIFACT ETD Library User's Guide*

1.6 SeeBeyond eBusiness Integration Suite

This section provides an overview of the SeeBeyond eBusiness Integration Suite and its parts. It also provides a detailed overview of the e*Xchange Partner Manager and eSecurity Manager components.

One of the biggest challenges today in conducting eBusiness is dealing with complex and dynamic partner relationships and coordinating control of the various activities participating in the eBusiness process. Both organizations and their trading partners are faced with the problem of managing disparate component applications and aligning proprietary software requirements. In addition, organizations and their trading partners must agree on data exchange and security standards.

The SeeBeyond eBusiness Integration Suite merges traditional Enterprise Application Integration (EAI) and Business-to-Business (B2B) interactions into a multi-enterprise eBusiness Integration (eBI) product suite. This suite allows you to:

- leverage your existing technology and applications
- create an eApplication consisting of component applications that are managed by your organization or your trading partners
- rapidly execute eBusiness strategies
- create and manage virtual organizations across the entire value chain
- rapidly implement industry standard business protocols
- quickly and easily establish new, or update existing, business partners
- automatically secure transmissions sent over the public domain

This suite also provides:

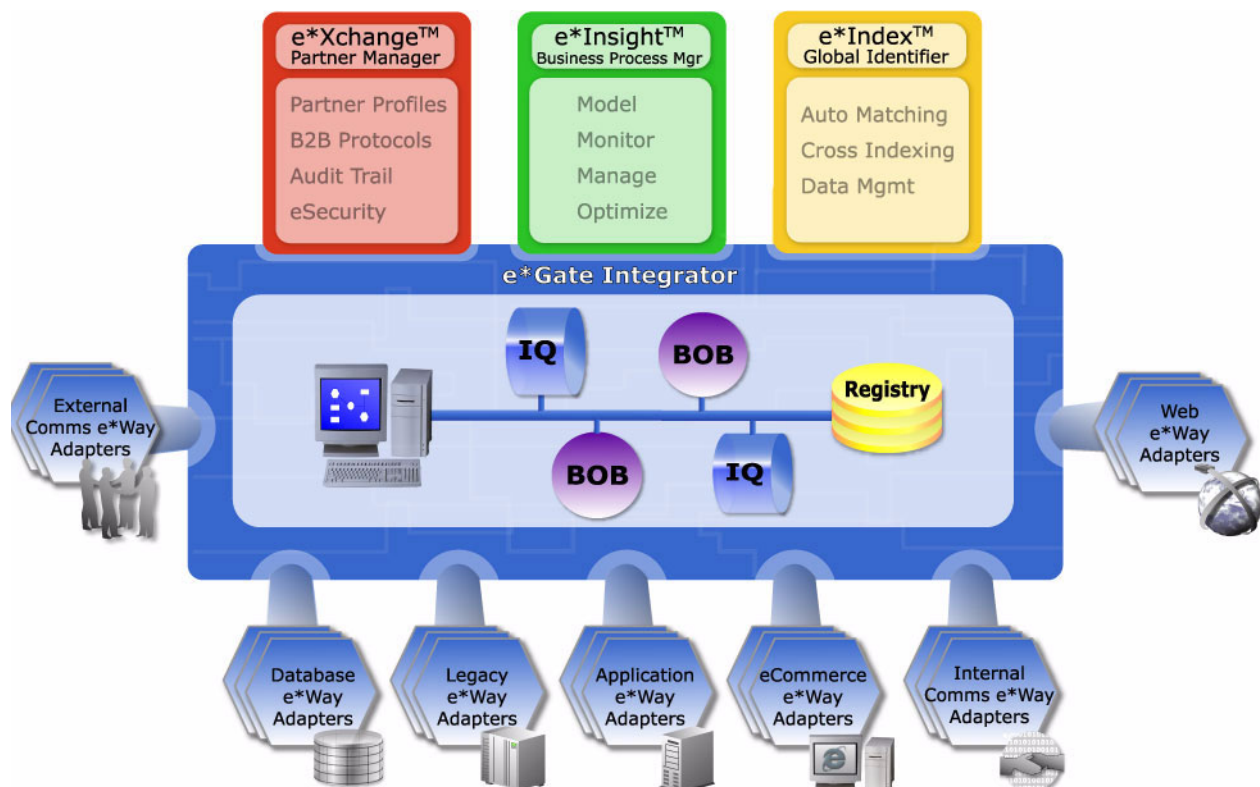
- extensive and flexible back-office connectivity
- powerful data transformation and mapping facilities
- content-based routing
- unparalleled scalability based on a fully distributed architecture

1.6.1 SeeBeyond eBusiness Integration Suite Components

The SeeBeyond eBusiness Integration Suite includes the following components and sub-components:

- eBusiness Integration Solutions:
 - ♦ e*Insight™ Business Process Manager
 - ♦ e*Xchange Partner Manager
 - ♦ eSecurity Manager
 - ♦ e*Index Global Identifier
- e*Gate™ Integrator:
 - ♦ e*Way™ Intelligent Adapters
 - ♦ IQ™ Intelligent Queues
 - ♦ Business Object Brokers (BOBs)
 - ♦ Intelligent Bridges™

Figure 1 SeeBeyond eBusiness Integration Suite



eBusiness Integration Solutions

The eBusiness Integration Solutions suite includes features and functions to facilitate effective business process management, provide eBusiness protocol support, allow effective partner management, and ensure secure eBusiness communications.

e*Insight Business Process Manager

The e*Insight Business Process Manager facilitates the automation and administration of business process flow across eBusiness activities. Through graphical modeling and monitoring, business analysts can instantly assess the detailed state of a business process instance and identify bottlenecks in the process.

e*Xchange Partner Manager

The e*Xchange Partner Manager manages trading partner profiles and supports standard eBusiness message format and enveloping protocols, including RosettaNet, UN/EDIFACT, ASC X12, and BizTalk. The e*Xchange Partner Manager includes a Validation Rules Builder to aid in the creation of X12 and UN/EDIFACT message validation based on industry implementation guides.

eSecurity Manager

The eSecurity Manager authenticates and ensures full integrity of message data sent to and from trading partners, which is imperative when conducting eBusiness over the public domain. The eSecurity Manager uses public key infrastructure (PKI) to ensure origin authentication of the sender.

e*Index Global Identifier

e*Index Global Identifier (e*Index) is a global cross-indexing application that provides a complete solution for automated person-matching across disparate source systems, simplifying the process of sharing member data between systems.

e*Index centralizes information about the people who participate throughout your business enterprise. The application provides accurate identification and cross-referencing of member information in order to maintain the most current information about each member. e*Index creates a single, consistent view of all member data by providing an automatic, common identification process regardless of the location or system from which the data originates.

e*Gate Integrator Components

The e*Gate Integrator enables the flow of information across an extended enterprise by providing comprehensive connectivity to applications and datastores across a network. e*Gate is based on a distributed architecture with an open design that deploys flexible load balancing options. e*Gate processes events according to user-defined business logic and integrates business processes between applications, ensuring end-to-end data flow into back-office systems.

e*Way Intelligent Adapters

e*Way Intelligent Adapters provide specialized application connectivity and also provide support for robust data processing such as business collaborations, transformation logic, and publish/subscribe relationships. e*Way adapters are multi-

threaded to enable high-performance distributed processing capabilities. This multi-threaded processing allows for ultimate deployment flexibility and load balancing.

IQ Intelligent Queues

IQ Intelligent Queues are open queue services for SeeBeyond or third-party queuing technology, that provide robust data transport with guaranteed once-only message delivery.

Business Object Brokers

Business Object Brokers (BOBs) enable routing and load balancing between queues for implementing multi-step business processes.

Intelligent Bridges

Intelligent Bridges deliver pre-packaged process automation for key front and back office applications.

1.7 Introducing e*Xchange Partner Manager

The e*Xchange Partner Manager (e*Xchange) manages trading partner profiles and supports standard eBusiness protocols such as ASC X12, UN/EDIFACT, RosettaNet, and BizTalk. e*Xchange includes the Validation Rules Builder, a tool for converting EDI implementation guide files into files that are compatible for use with e*Xchange—X12 and UN/EDIFACT Validation Collaboration Rules (.tsc) files and Event Type Definition (.ssc) files.

Specifically, e*Xchange Partner Manager provides the following functionality:

- Receives, processes, and routes inbound and outbound messages in batch and interactive transmission modes.
- Validates messages based on libraries of Event Type Definitions (ETDs; templates of data to be exchanged, including fields, field sequences, and delimiters) and Collaboration scripts that conform to eBusiness protocols such as ASC X12, UN/EDIFACT, RosettaNet, and BizTalk.
- Stores trading partner information, messages, acknowledgments, and errors in a database.
- Automatically generates and reconciles acknowledgments.
- Handles and reports errors.
- Allows users to define trading partner profiles.
- Allows users to view messages. Additionally, the Web interface has a message resend capability.
- Allows users to generate reports that have been predefined in Seagate Crystal Reports (e*Xchange Client for Windows only).
- Automatically supports message enveloping as specified by the supported standards.

The e*Xchange Partner Manager provides both a Windows-based GUI, e*Xchange Client for Windows, and a Web-based graphical user interface, to facilitate:

- Defining and maintaining trading partner profiles.
- Generating reports that have been predefined in Crystal Reports (e*Xchange Client for Windows only).
- Creating and responding to action items.
- Monitoring messages.
- Resending messages (e*Xchange Web interface only).

It also facilitates the following system maintenance tasks:

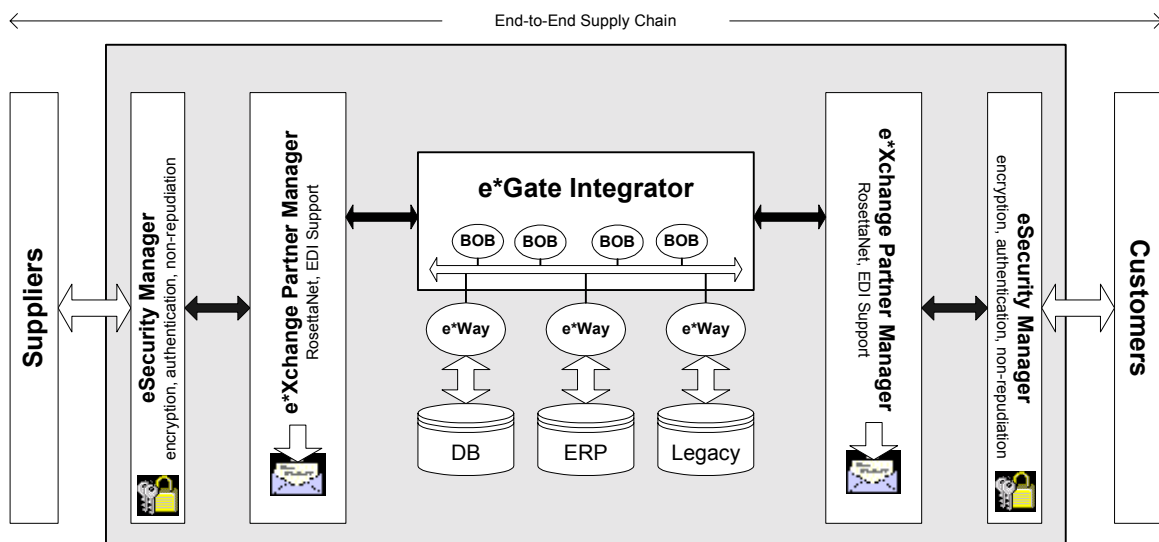
- Defining default extended attribute values as required for your business.

Any special attributes that are not common to all protocols are recorded as extended attributes.

- Creating inner envelope definitions for each message you process with e*Xchange.
- Establishing system defaults for your installation.

See Figure 2 for a graphical representation of e*Xchange Partner Manager.

Figure 2 e*Xchange Partner Manager



1.8 Introducing eSecurity Manager

The eSecurity Manager (eSM) is an optional component that provides security features, allowing the secure transmission of business-to-business (B2B) exchanges over public domains such as the Internet. It provides the ability to use Public Key Infrastructure (PKI) technology to digitally sign and encrypt messages as they are sent to trading

partners, and conversely to decrypt and authenticate messages when they are received from trading partners.

The eSM, in tandem with secure e*Ways (for example, the HTTPS e*Way), secures the data channel used to exchange sensitive information with trading partners.

Note: *HTTPS is only available if you are using the Web interface, since SSL is not available for selection in e*Xchange Client for Windows.*

The eSM can be separated into two parts: a front end and a back end. The front end is integrated with the e*Xchange Partner Manager (e*Xchange), and provides the ability to keep track of all the security configuration parameters. At the Outer Envelope level, on the **Secure Data Transport** tab, you can import the keys and certificates needed to encrypt and decrypt messages exchanged with trading partners.

The e*Xchange Partner Manager back end manipulates the messages. It is composed of a specially designed Monk extension that performs the encryption, decryption, signing, and authentication of messages using the S/MIME standard.

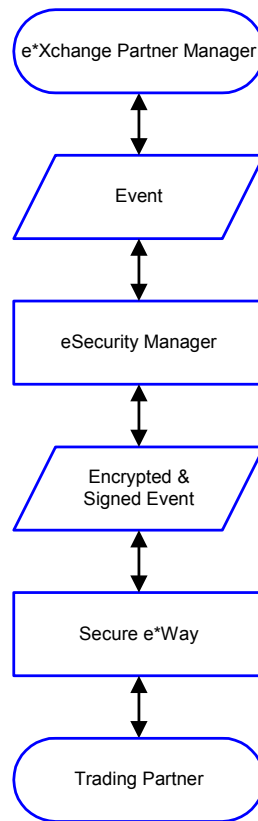
1.8.1 Where the eSM fits into e*Xchange

The eSecurity Manager acts as an interface for dealing with secure messages sent between the e*Xchange Partner Manager and the trading partners. Specifically, eSM performs two functions:

- Processes outbound messages as the last step before the messages are forwarded to a secure e*Way for transmission to a trading partner's system.
- Processes inbound messages as the first step after the messages are received by a secure e*Way.

Figure 3 shows the flow of information between e*Xchange Partner Manager and a trading partner when eSecurity Manager is in use.

Figure 3 eSecurity Manager



1.8.2 Features

The eSecurity Manager provides a comprehensive solution to security requirements for B2B exchanges and partnerships. It provides the following services:

- Encryption

Messages can be encrypted using public key infrastructure (PKI) to ensure the confidentiality of the exchange.

- Exchange content integrity

Data integrity is ensured through the use of standard one-way hash algorithms. This mechanism ensures that no modifications (additions, changes, or deletions) are made to the message while it is in transit between partners.

- Origin authentication

The identity of the sender of a message is verified through the use of digital signatures using PKI. This ensures that the message was actually sent by the entity who claims to have sent it.

- Non-repudiation of transmission and receipt

The eSecurity Manager provides the appropriate facilities for tracking all exchanges (messages) according to the defined parameters of the supported business protocol

(RosettaNet, ASC X12, or BizTalk) for the purpose of ensuring indisputable confirmation of both transmission and receipt.

- Key management

Because all the above security functions are supported through the use of PKI, the e*Xchange Partner Manager also provides appropriate facilities for storing your own private key and the public keys for each trading partner.

1.8.3 Sending and Receiving a Digitally Signed Message

The following steps describe how to send and receive a digitally signed message.

- 1 The message is put through a “hash” function; that is, a function that creates a short, unique mathematical representation of the original message called the message digest (for example, MD5 or SHA).
- 2 The message digest is encrypted using the sender’s private key to create a digital signature.
- 3 The original message and the digital signature are sent together as a signed message to the recipient.
- 4 The recipient takes the message portion of the signed message and puts it through the same hash function used by the sender to create a message digest.
- 5 The recipient takes the digital signature portion of the signed message and decrypts it using the sender’s public key to create another copy of the message digest.
- 6 The recipient compares the message digests from steps 4 and 5. If they are equal, the message has arrived unaltered and was sent by the trading partner who holds the private key corresponding to the public key we have for the trading partner. In this way the authenticity of both the sender and the message can be verified.

1.8.4 eSM Outbound Event Processing Overview

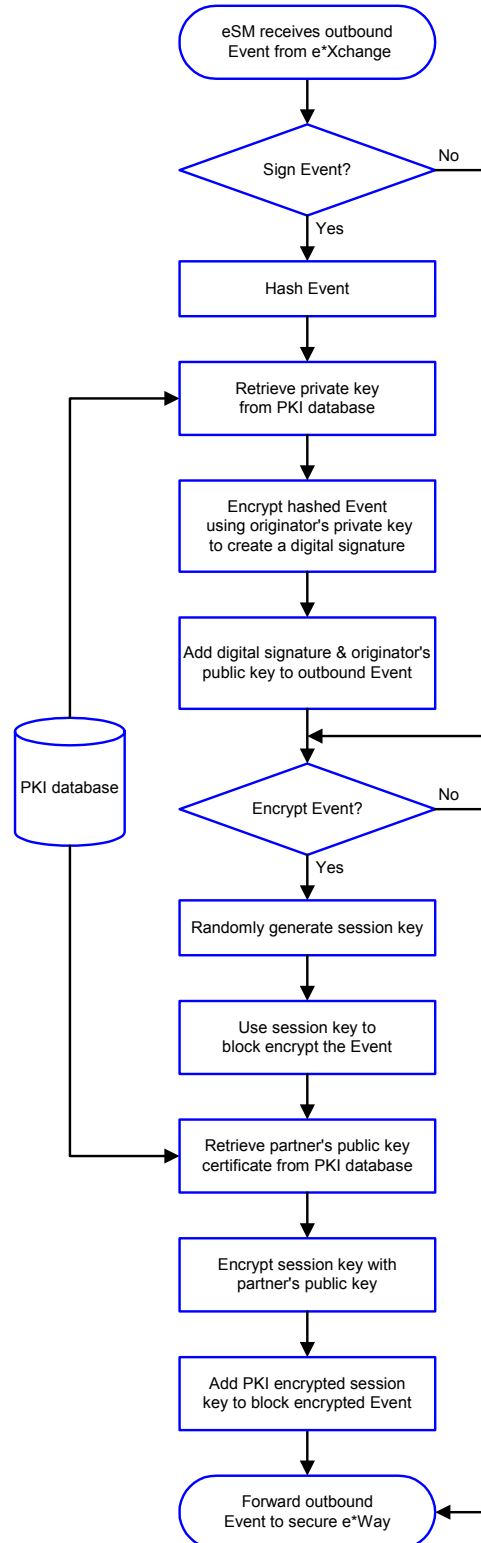
Figure 4 shows the processing of an outbound Event (message) as it passes through the eSM module.

If a digital signature is required, the eSM makes a logical hash of the Event and then encrypts it using your private key. The encrypted hash is the digital signature. Upon receipt of the message, the trading partner deciphers the hash using your public key. Since the hash correlates to the actual message content, any alterations to the message after it is signed would also invalidate the signature.

If encryption is required, the eSM randomly generates a session key. The session key is used to encrypt the Event. The session key itself is then encrypted using the trading partner’s public key, and the encrypted key is added to the Event.

Once all necessary steps have been completed, the Event is forwarded to the secure e*Way.

Figure 4 eSM Outbound Event Processing



1.8.5 eSM Inbound Event Processing Overview

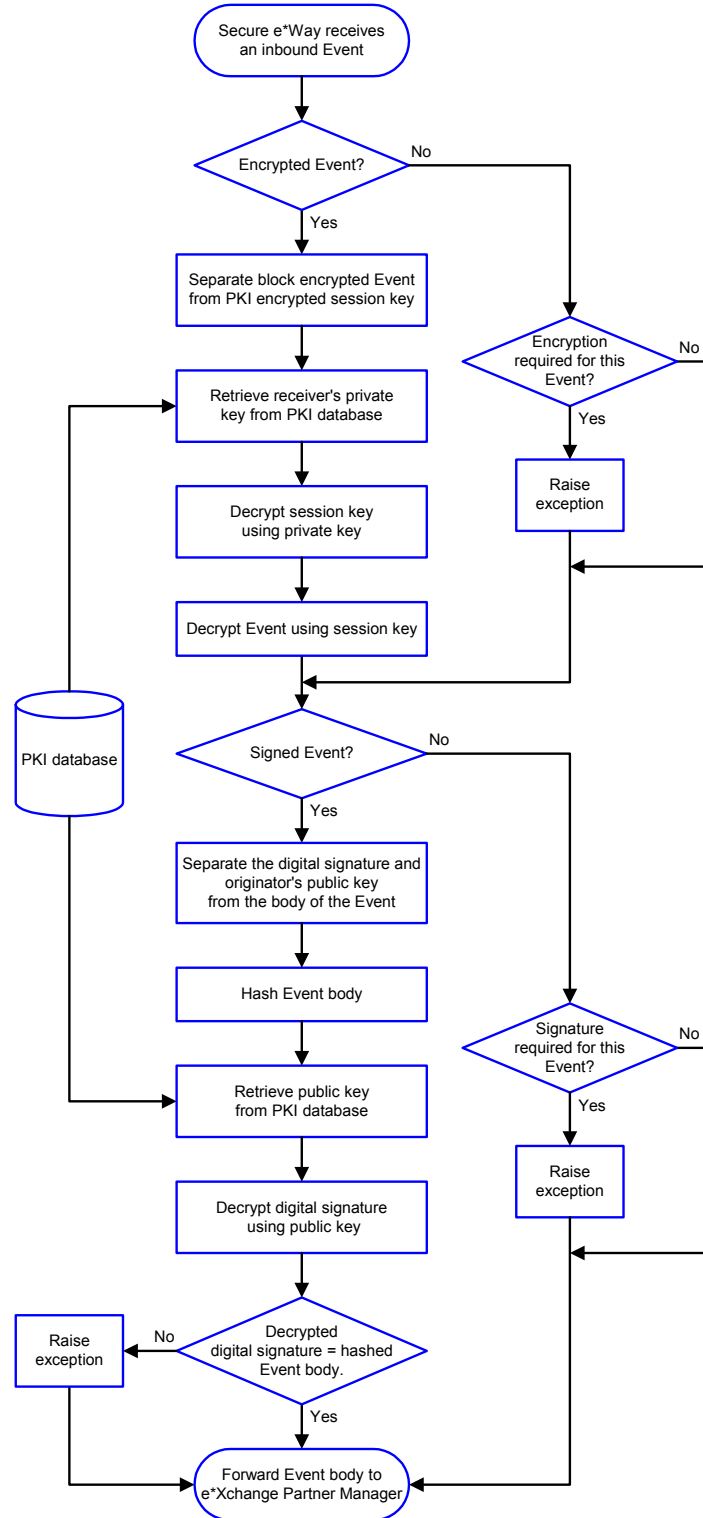
Figure 5 shows the processing of an inbound Event as it passes through the eSM module.

If the Event is encrypted, the eSM locates the encrypted session key within the Event and decrypts it using your private key. It then uses the decrypted session key to decrypt the body of the Event.

If the Event has a digital signature attached to it, the eSM decrypts the digital signature using the sender's public key. It also hashes the Event body with the hash algorithm, which is part of the digital signature. It then compares the decrypted digital signature with the hashed Event body. If they match, the signature has been verified.

Once all necessary steps have been completed, the Event is forwarded to the secure e*Way.

Figure 5 eSM Inbound Event Processing



For more information on the security features of e*Xchange, refer to the white paper *eSecurity: Providing Internet Security for eBusiness* at the following URL:

<http://www.seebeyond.com/products/whitepapers.html>

Getting Started

The e*Xchange Partner Manager allows you to set up and store information about each of your trading partners so that you can exchange (send and receive) messages.

The e*Xchange Partner Manager also includes features to assist you with managing and troubleshooting the information exchange process. For example, you can use the Message Tracking dialog box to view the actual text of messages that generated errors.

This chapter provides basic information to help you become familiar with the e*Xchange Partner Manager. It includes the following:

- Instructions for logging in to e*Xchange Partner Manager.
- Information on the components of the user interface, including menus, toolbars, icons, properties dialog boxes, and the status bar.
- Instructions for setting user preferences.

2.1 Logging In to the e*Xchange Partner Manager

To run the e*Xchange Partner Manager, you must specify your login ID, password, and the database instance you want to use.

To log in to the e*Xchange Partner Manager

- 1 On the Windows **Programs** menu, point to **eXchange Partner Manager**.

The e*Xchange Partner Manager login dialog box appears (see Figure 6).

- 2 Specify the server.

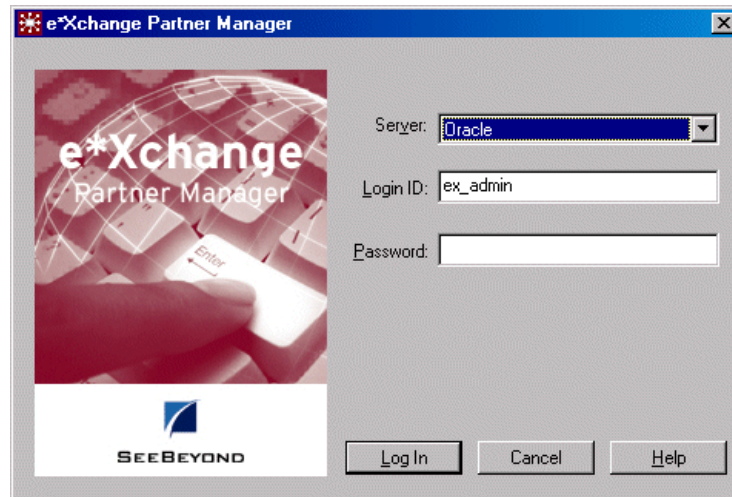
Select the name of the data source that you want to use from the drop-down list.

- 3 Type your login ID and password. For more information, see Table 1.

- 4 Click **Log In**.

The Partner Manager window appears (see [Figure 7 on page 19](#)).

Note: When you first log in, you will probably be using a default password. It is a good idea to select a unique password as soon as possible. To change the password, on the **File** menu, click **Change Password**.

Figure 6 e*Xchange Partner Manager Login**Table 1** e*Xchange Partner Manager Login Fields

Field	Description
Server	The data source name that was set up during the ODBC configuration. Select from the drop-down list. Next time you log in, it defaults to your last selection.
Login ID	Your user ID, which is case-sensitive. The login ID must match the user ID required for you to access the server on which the e*Xchange Partner Manager data files are stored. If you have logged in previously, this field defaults to the user ID last used to log in.
Password	Your password (5–20 characters), which must match the password required for you to access the server on which the e*Xchange Partner Manager data files are stored. Note: If your database is case-sensitive, make sure you use the correct capitalization in the password. If you are using Sybase, the password must have at least six characters.
Log In	When you have specified login ID, password and server, click Log In to log in to the e*Xchange Partner Manager.
Cancel	This button cancels the login operation.

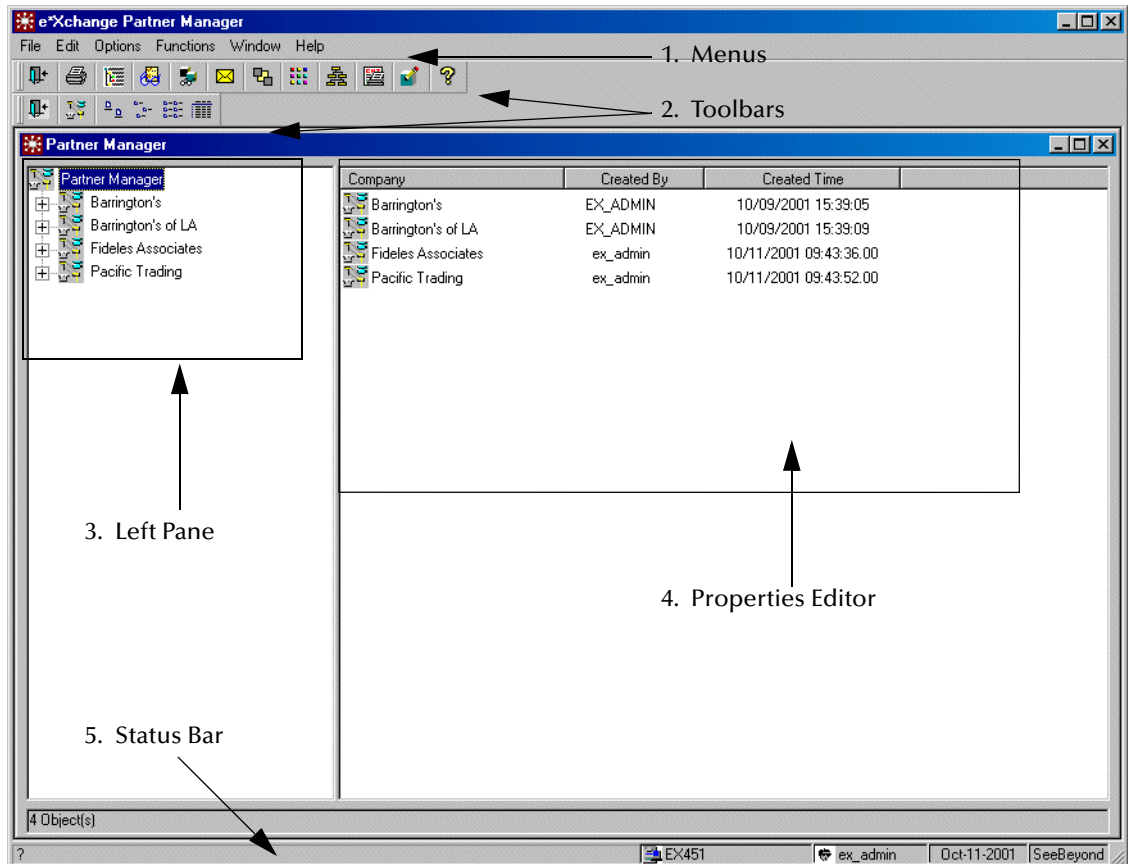
2.2 Using the e*Xchange Partner Manager

This section provides information on the e*Xchange Partner Manager workspace, the menus, and the **Properties** dialog box.

2.2.1 e*Exchange Partner Manager Workspace

The e*Exchange Partner Manager, as shown in Figure 7, allows you to create and configure profiles for each of your trading partners.

Figure 7 e*Exchange Partner Manager Workspace



The e*Exchange Partner Manager workspace consists of several components:

- 1 Menu
A list of options that provide access to functions for completing specific tasks.
- 2 Toolbars
A set of graphic icons (tools) that provide quick access to basic functions.
- 3 Left Pane
The trading partner components, arranged in a tree-like structure, similar to the left pane in Windows Explorer.
- 4 Properties Editor (right pane)
A list of sub-components associated with the component selected in the left pane.

5 Status Bar

The bar along the bottom of the e*Xchange Partner Manager workspace that displays system information. From left to right, it displays: system message, server, login ID, date, and company name.

2.2.2 Using e*Xchange Partner Manager Menus

The e*Xchange Partner Manager provides the following drop-down menus:

- File
- Edit
- Options
- Actions (appears when a **Properties** dialog box is displayed)
- Functions
- Window
- Help

File Menu

Table 2 e*Xchange Partner Manager File Menu

Menu Command	Description
Close	Closes the active window or dialog box. Only available if a window or dialog box is currently open.
Connection	Displays the login dialog box so you can log in using a different database instance. Only available if all windows are closed.
Print Active Screen	Prints an image of the active window or dialog box to the default printer. Additional information is included on the printout, such as the application name and server name.
Print Setup	Accesses the Printer Setup dialog box so you can change the default printer and the print properties.
Change Password	Accesses the Change Password dialog box so that you can change your password. Type the new password (5–20 characters) once and then type it again to confirm. Note: If you are using a Sybase database, the password must be at least six characters long.
Exit	Closes the e*Xchange Partner Manager.

Edit Menu

Table 3 e*Xchange Partner Manager Edit Menu

Menu Command	Description
Undo	Undoes the last text editing action performed in a dialog box. Note: Some actions you perform cannot be undone. If the Undo command is unavailable, you cannot cancel your last action.
Copy	Copies a text string selected in a dialog box to the Windows Clipboard.
Cut	Cuts a selected text string from a dialog box.
Paste	Pastes a text string from the Windows Clipboard to a box in a dialog box, at the cursor location.

Options Menu

Table 4 e*Xchange Partner Manager Options Menu

Menu Command	Description
Company	Displays a sub-menu, from which you can choose one of the following options. The command is only available if you have highlighted a company folder in the left pane of the e*Xchange Partner Manager window.
	New Company Accesses the New Company dialog box so that you can add a new company to the database.
	Paste If you have previously copied trading partner information to the clipboard, this option allows you to paste the information, creating a new sub-component of the company.
	Delete Allows you to delete a company and all the levels below it. Before deleting, e*Xchange displays a Delete Statistics dialog box so you can view a summary of the components being deleted, and cancel if necessary.
	Reports Accesses the Reports dialog box so that you can generate any reports available for the component level.
	New Trading Partner Allows you to create a new trading partner for the highlighted company.
	Properties Allows you to view or modify the properties of the highlighted company.

Table 4 e*Xchange Partner Manager Options Menu (Continued)

Menu Command	Description
Trading Partner	Displays a sub-menu, from which you can choose one of the following options. The command is only available if you have highlighted a trading partner folder in the left or right pane of the e*Xchange Partner Manager window.
New Trading Partner	Allows you to create a new trading partner.
Copy Trading Partner	Copies the highlighted trading partner information to a new trading partner under the same company.
Copy Cascade to Another Company	Allows you to copy the trading partner information to the clipboard. You can then paste it to a different company.
Paste	If you have previously copied outer envelope information to the clipboard, this option allows you to paste the information, creating a new sub-component of the trading partner.
Delete	Allows you to delete a trading partner and all the levels below it. Before deleting, e*Xchange displays a Delete Statistics dialog box so you can view a summary of the components being deleted, and cancel if necessary.
Reports	Accesses the Reports dialog box so that you can generate any reports available for the component level.
New Outer Envelope	Allows you to create a new outer envelope for the highlighted trading partner.
Properties	Accesses the Properties dialog box for the selected trading partner, so that you can view or modify the trading partner properties.

Table 4 e*Xchange Partner Manager Options Menu (Continued)

Menu Command	Description
Outer Envelope	Displays a sub-menu, from which you can choose one of the following options. The command is only available if you have highlighted an outer envelope in the left or right pane of the e*Xchange Partner Manager window.
New Outer Envelope	Allows you to create a new outer envelope.
Copy Outer Envelope	Copies the highlighted outer envelope to a new outer envelope under the same trading partner.
Copy Cascade to Another Trading Partner	Allows you to copy the outer envelope information to the clipboard. You can then paste it to a different trading partner.
Paste	If you have previously copied outer envelope information to the clipboard, this option allows you to paste the information, creating a new sub-component of the trading partner.
Delete	Allows you to delete an outer envelope and all the inner envelopes below it. Before deleting, e*Xchange displays a Delete Statistics dialog box so you can view a summary of the components being deleted, and cancel if necessary.
Reports	Accesses the Reports dialog box so that you can generate any reports available for the component level.
New Inner Envelope	Allows you to create a new inner envelope for the highlighted outer envelope.
Properties	Allows you to view or modify the properties of the highlighted outer envelope.

Table 4 e*Xchange Partner Manager Options Menu (Continued)

Menu Command	Description	
Inner Envelope	Displays a sub-menu, from which you can choose one of the following options. The command is only available if you have highlighted an inner envelope in the Properties Editor portion (right pane) of the e*Xchange Partner Manager.	
	New Inner Envelope	Allows you to create a new inner envelope.
	Copy Inner Envelope	Copies the highlighted inner envelope to a new inner envelope under the same outer envelope.
	Copy Cascade to Another Outer Envelope	Allows you to copy the inner envelope information to the clipboard. You can then paste it to a different outer envelope.
	Delete	Allows you to delete an inner envelope. Before deleting, e*Xchange displays a Delete Statistics dialog box so you can view a summary of the components being deleted, and cancel if necessary.
	Reports	Accesses the Reports dialog box so that you can generate any reports available for the component level.
	Properties	Allows you to view or modify the properties of the highlighted inner envelope.

Actions Menu

Note: The Actions menu is only available when a **Properties** dialog box is displayed.

Table 5 e*Xchange Partner Manager Actions Menu

Menu Command	Description
Apply	Saves changes that you have made to the Properties dialog box.
Delete	Allows you to delete certain elements from the properties of a company, trading partner, outer envelope, or inner envelope; for example, you can delete a contact or an action item.
New	When the Contacts or Comments tab is selected in the Properties dialog box, this option deletes any existing information and leaves all boxes blank for you to enter new information.
Cancel	Closes the Properties dialog box without saving any changes.

Functions Menu

Table 6 e*Xchange Partner Manager Functions Menu













Menu Command	Description
Partner Manager	Displays the Partner Manager workspace.
My Action Items	Displays the My Action Items dialog box, showing any items currently logged as action items.
Message Tracking	Displays the Message Tracking dialog box, showing any current messages.
System Administration	Allows you to access the following system administration functions: <ul style="list-style-type: none"> ▪ Partner Manager Envelope Setup ▪ Inner Envelope Definition Setup ▪ Message Tracking Attributes Setup ▪ Code Tables ▪ System Defaults ▪ Error Table ▪ Attribute Value Maintenance ▪ Report Maintenance
User Preferences	Allows you to set individual user preferences that will override the system defaults.
Validation Collaboration Setup	Allows you to set up validation Collaborations created outside e*Xchange Partner Manager so that they will be available on a selection list in Inner Envelope Definition Setup .
Reports	Allows you to select any of the reports available in e*Xchange Partner Manager for viewing and printing.
Archive/De-Archive	Allows you to archive messages and to de-archive messages that have been archived.
Import/Export	Allows you to export trading partner information to a file and to import trading partner information that has been exported.
View	Provides access to the various views available: <p>Large Icon—Displays items on the right pane of the e*Xchange Partner Manager window as large icons.</p> <p>Small Icon—Displays items on the right pane of the e*Xchange Partner Manager window as small icons.</p> <p>List—Displays items on the right pane of the e*Xchange Partner Manager window as list item (includes icon and title for each item).</p> <p>Detail—Displays items on the right pane of the e*Xchange Partner Manager window in detail (includes icon, title, status, ID of creator, and creation date for each item).</p>

Window Menu

Table 7 e*Xchange Partner Manager Window Menu

Menu Command	Description
Vertical	Allows you to resize and arrange multiple windows without overlap so that each window is longer than it is wide.

Table 9 e*Xchange Partner Manager Primary Toolbar

Tool	Name	Description
	Exit	Exits the e*Xchange Partner Manager.
	Print Active Screen	Prints an image of the active window or dialog box.
	Partner Manager	Displays the e*Xchange Partner Manager workspace.
	My Action Items	Displays the My Action Items dialog box.
	Message Tracking	Displays the Message Tracking dialog box.
	Partner Manager Envelope Setup	Displays the Partner Manager Envelope Setup dialog box (members of eX Administrator user group only).
	Inner Envelope Definition Setup	Displays the Inner Envelope Definition Setup dialog box (members of eX Administrator user group only).
	System Defaults	Displays the System Defaults dialog box (members of eX Administrator user group only).
	Validation Collaboration Setup	Displays the Validation Collaboration Setup dialog box (members of eX Administrator user group only).
	Reports	Allows you to select any of the reports available in e*Xchange Partner Manager for viewing and printing.
	Attribute Value Maintenance	Displays the Attribute Value Maintenance dialog box (members of eX Administrator user group only).
	Help	Displays the online Help.

Function Toolbar

The Function toolbar appears below the primary toolbar and contains, at any point, a selection of the following tools. The availability of these tools on this toolbar depends on which folder you have highlighted on the left pane of the e*Xchange Partner Manager window or which dialog box is running.

Table 10 e*Xchange Partner Manager Function Toolbar



Tool	Name	Description
	Close	Closes the window or dialog box that is currently open.
	New Company	Accesses the New Company dialog box so that you can add a new company to the database. Available when the Partner Manager icon or a company is highlighted.

Table 10 e*Exchange Partner Manager Function Toolbar (Continued)





















Tool	Name	Description
	New Trading Partner	Allows you to create a new trading partner for the highlighted company.
	New Outer Envelope	Allows you to create a new outer envelope for the highlighted trading partner.
	New Inner Envelope	Allows you to create a new inner envelope for the highlighted outer envelope.
	<ul style="list-style-type: none"> Copy Trading Partner Copy Outer Envelope Copy Inner Envelope 	<ul style="list-style-type: none"> Allows you to create a new trading partner based on the one that is highlighted. Allows you to create a new outer envelope based on the one that is highlighted. Allows you to create a new inner envelope based on the one that is highlighted.
	<ul style="list-style-type: none"> Copy Cascade to Another Company Copy Cascade to Another Outer Envelope Copy Cascade to Another Inner Envelope 	<ul style="list-style-type: none"> Allows you to copy the trading partner information to the clipboard. You can then paste it to a different company. Allows you to copy the outer envelope information to the clipboard. You can then paste it to a different trading partner. Allows you to copy the inner envelope information to the clipboard. You can then paste it to a different outer envelope.
	Paste	If you have previously copied a trading partner, outer envelope, or inner envelope to the clipboard, this option allows you to paste it as a sub-component of a different component. For example, you can copy a trading partner set up under one company, and paste it, along with its outer and inner envelopes, to another company.
	Delete	<ul style="list-style-type: none"> Allows you to delete certain elements from the properties of a company, trading partner, outer envelope, or inner envelope; for example, you can delete a contact or an action item. Allows you to delete an entire component (company, trading partner, outer envelope, or inner envelope) and all the levels below it.
	Reports	Allows you to generate reports for the specific component level.
	Properties	Allows you to view or modify the properties of the highlighted company.
	Large Icon	Displays items on the right pane of the e*Exchange Partner Manager window as large icons.
	Small Icon	Displays items on the right pane of the e*Exchange Partner Manager window as small icons.
	List	Displays items on the right pane of the e*Exchange Partner Manager window as list items (includes icon and title for each item).

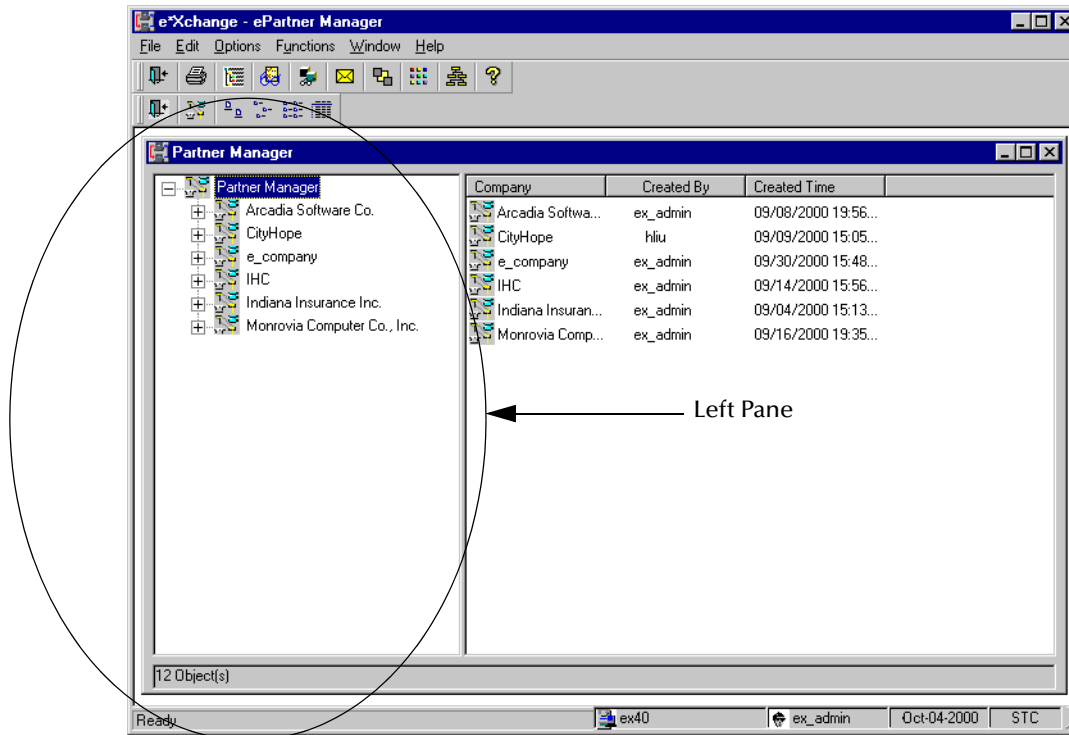
Table 10 e*Xchange Partner Manager Function Toolbar (Continued)

Tool	Name	Description
	Detail	Displays items on the right pane of the e*Xchange Partner Manager window in detail (includes icon, title, status, ID of creator, and creation date for each item).
	Apply	Saves changes you have made in a Properties dialog box.
	New	When the Contacts or Comments tab is selected in the Properties dialog box, this option starts a new Contact, Note, or Action Item record with all boxes blank for you to enter new information.
	Cancel	Closes the Properties dialog box without saving any changes.
	Clear (Message Tracking only)	Clears selections already made in the current tab of the Message Tracking dialog box.
	View Original Message (Message Tracking only)	Allows you to view the original message. The message text is opened in a text window (see Figure 186 on page 368). Text can be viewed and printed, but it cannot be edited. To close the message, from the File menu, select Close .
	View Enveloped Message (Message Tracking only)	Allows you to view the enveloped message. The message text is opened in a text window. Text can be viewed and printed, but it cannot be edited. To close the message, on the File menu, click Close . Only available when Message Tracking is open and the selected message has a value for the Env Msg ID . Note: If the message is an outbound batch message, you will see only the inner segments (ST-SE for X12, UNH-UNT for UN/EDIFACT). If the message is an inbound batch message, or is interactive, you will see all the envelope layers.
	View Acknowledgment Message (Message Tracking only)	Allows you to view the acknowledgment message. The message text is opened in a text window. Text can be viewed and printed, but it cannot be edited. To close the message, on the File menu, click Close . Only available when Message Tracking is open and the selected message has a value for the Ack Msg ID .

2.2.4 Using the Left Pane of the e*Xchange Partner Manager

The left pane of the e*Xchange Partner Manager is similar to the left pane of the Windows Explorer (see Figure 9).

Figure 9 Navigation Section of the e*Exchange Partner Manager



Working With the Left Pane of the e*Exchange Partner Manager

Do any of the following:

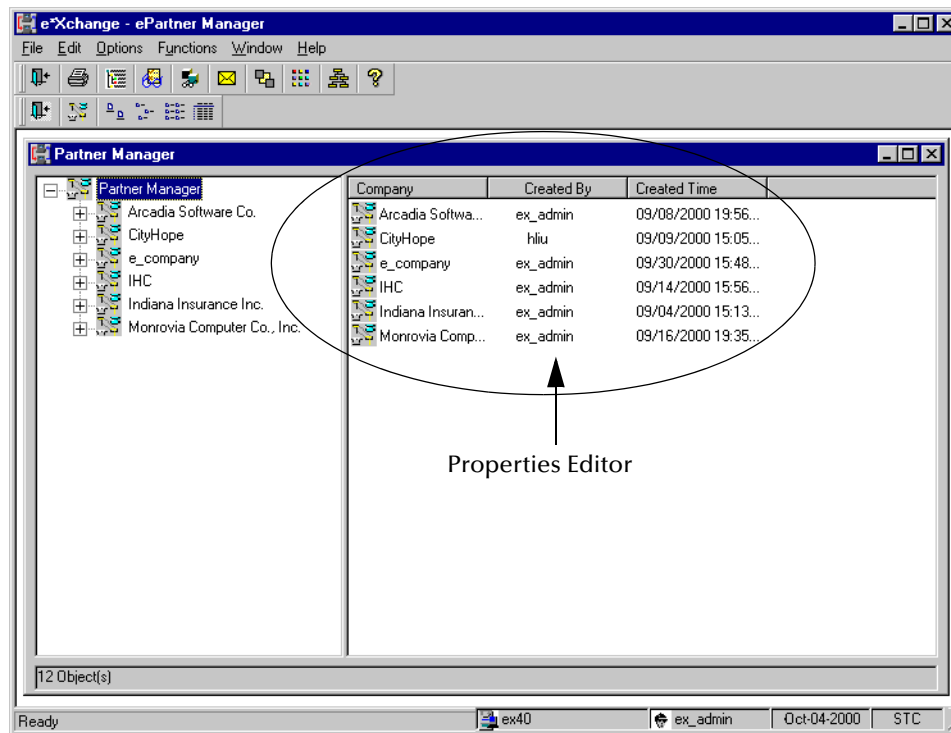
- Click a “plus” icon (⊕) to open a folder.
- Click a “minus” icon (⊖) to close a folder.
- Double-click a folder to open or close it.
- Click a folder to select that component. The child components appear in the Properties Editor (right pane).
- To view or modify a component’s properties, click on the component and click

Properties . The **Properties** dialog box for that component appears.

2.2.5 Using the e*Exchange Partner Manager Properties Editor

The Properties Editor is similar to the right pane of the Windows Explorer (see Figure 10).

Figure 10 e*Exchange Partner Manager Properties Editor



Working With the Properties Editor

Within the Properties Editor, you can:

- Double-click the name of a company, trading partner, or outer envelope to display the contents of the folder.
- Double-click an inner envelope to display its properties.
- Right-click a trading partner, outer envelope, or inner envelope to display an action menu.

2.2.6 Working With e*Exchange Partner Manager Properties

To add, view, or modify trading partner profile components, you must use the **Properties** dialog box for the appropriate component.

Working With a Properties Dialog Box

Within the **Properties** dialog box, you can:

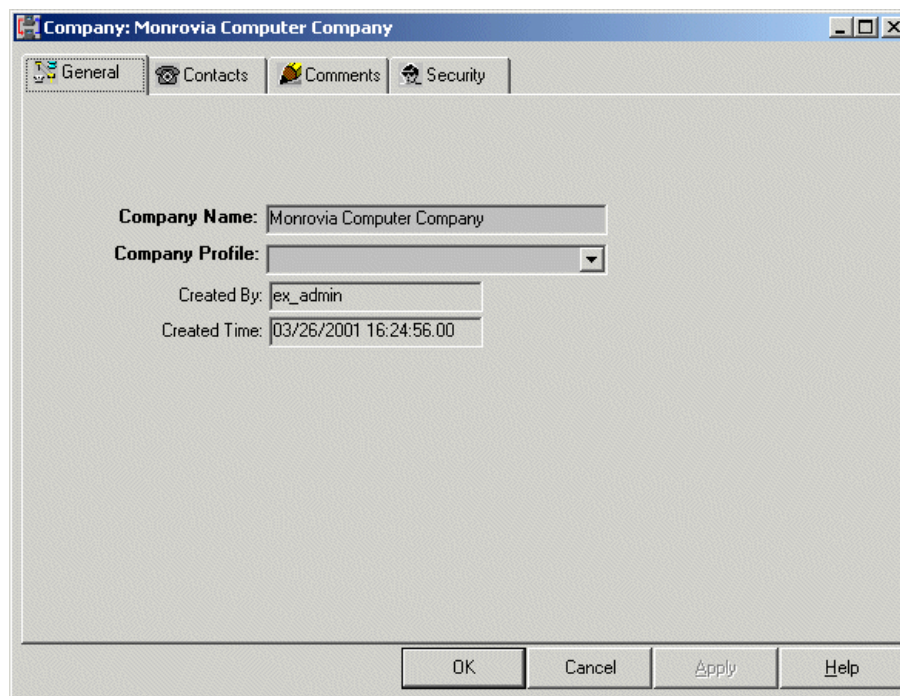
- Click a tab to display a different page
- Click **Apply** to save information without closing

- Click **OK** to save information and close
- Click **Cancel** to close without saving
- Click **Help** to access the online Help system

General Tab

Use the **General** tab of a **Properties** dialog box for entering and viewing basic information that identifies parent companies and trading partners (see Figure 11). For outer and inner envelopes, the information you enter for a trading partner profile is necessary for the exchange of messages; for example, the eBusiness protocol version used and whether the message is compressed.

Figure 11 Company Properties, General Tab



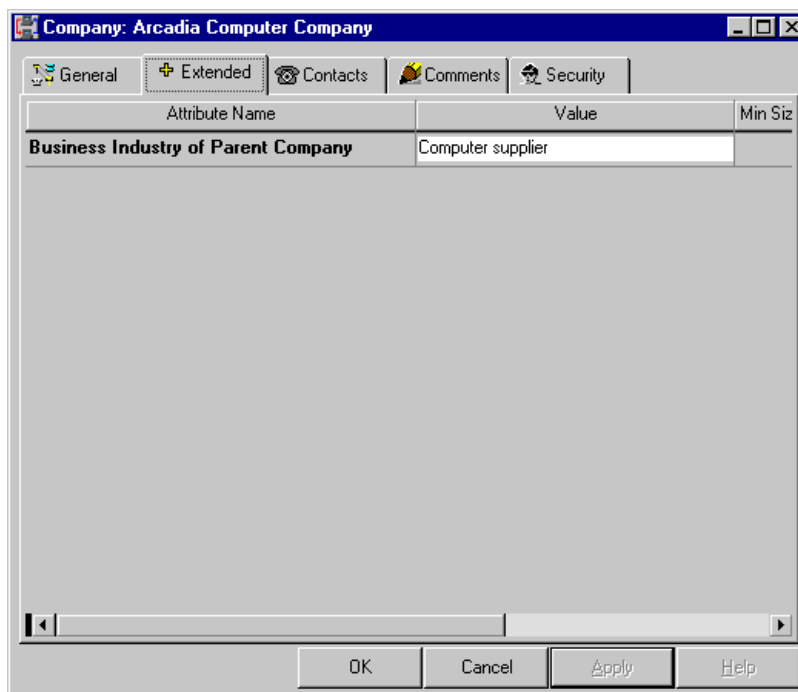
Extended Tab

At the Outer Envelope and Inner Envelope levels, use the Extended tab of a Properties dialog box to store information that is specific to the eBusiness protocol. You can also, if desired, use the Extended tab to track additional information at the Company and Trading Partner levels, as shown in Figure 12.

The extended tab is most important at the Outer Envelope and Inner Envelope levels. For example, characteristics of ASC X12 Interchange, Functional Group, and transaction set envelopes are required values that you enter as extended attributes if you are using X12.

Figure 12 shows the **Extended** tab of the **Company** dialog box.

Figure 12 Company Properties, Extended Tab



Contacts Tab

Use the **Contacts** tab of a **Properties** dialog box to store names, phone numbers, and addresses of contracts for a particular parent company, trading partner, outer envelope, or inner envelope (see Figure 13).

Figure 13 Company Properties, Contacts Tab

Company: Monrovia Computer Company

General Extended **Contacts** Comments Security

Contact Type: Primary Client Contact

First Name: Ashley **Last Name:** Thompson

Title: President **Expertise:** X12

Address Line 1: 1000 W. State Street

Address Line 2: Suite 200

City: Tujunga

State/Province: CA

ZIP/Postal Code: 91042

Country:

Email: athompson@monroviacomputer.com

Phone: (818) 555-1111 **Fax:** (818) 555-1112

Created By: ex_admin **Created Time:** 09/11/2000 08:58:11.00

Contact List

First Name	Last Name	Address Line 1	
Ashley	Thompson	1000 W. State Street	Tujunga

OK Cancel Apply Help

Comments Tab

Use the **Comments** tab of a **Properties** dialog box to enter supplementary information about a particular trading partner (see Figure 14). You can also assign action items that are related to the trading partner profile component (see Figure 15).

Figure 14 Company Properties, Comments Tab (Notes)

“Type” box indicates notes

Company: Monrovia Computer Co.

General Extended Contacts **Comments** Security

Type: Notes Status: New

Content: Call back next week.

Assigned To: Due Date: 00/00/0000

Completed By: Completed Time:

Created By: ex_admin Created Time: 06/14/2000 14:36:40.00

Comment List

Type	Status	Content	Assigned To	Due Date
Notes	New	Call back next week.		

OK Cancel Apply Help

Figure 15 Company Properties, Comments Tab (Action Items)

Company: Monrovia Computer Co.

General Extended Contacts Comments Security

Type: Action Follow Up Status: New

Content: Send test message and verify

Assigned To: [Empty] Due Date: 00/00/0000

Completed By: [Empty] Completed Time: [Empty]

Created By: ex_admin Created Time: 06/14/2000 14:36:40.00

Comment List

Type	Status	Content	Assigned To	Due Date
Action Follow Up	New	Send test message and verify		

OK Cancel Apply Help

Annotations:

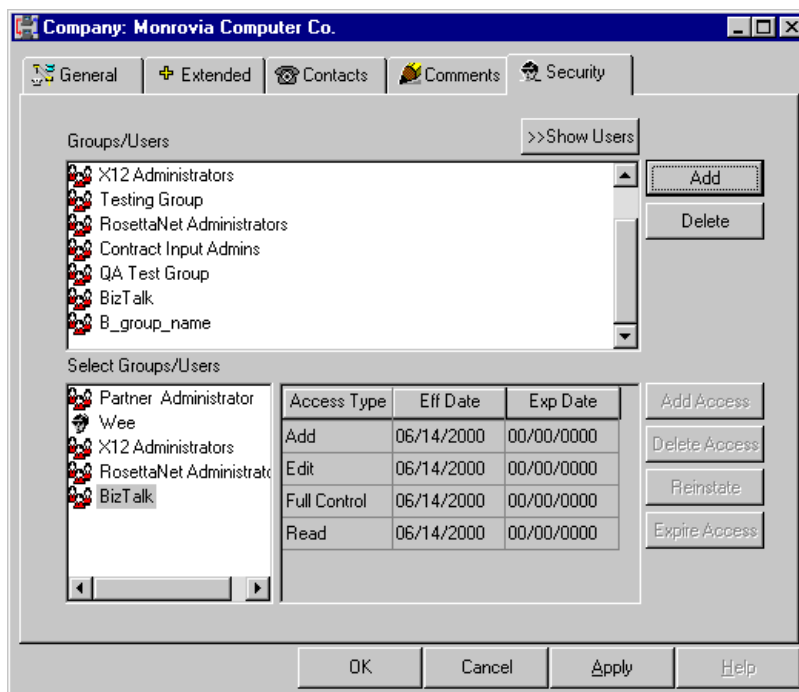
- "Type" box indicates action items
- Status box is available
- Assignment box is available
- Due Date box is available

For information on how an action item is followed up and completed, see ["Responding to Action Items" on page 222](#).

Security Tab

Use the **Security** tab of a **Properties** dialog box to identify which users and user groups can access a particular trading partner profile component (see Figure 16). You can also assign certain privileges to each user or group (add, edit, full control, or read).

Figure 16 Company Properties, Security Tab

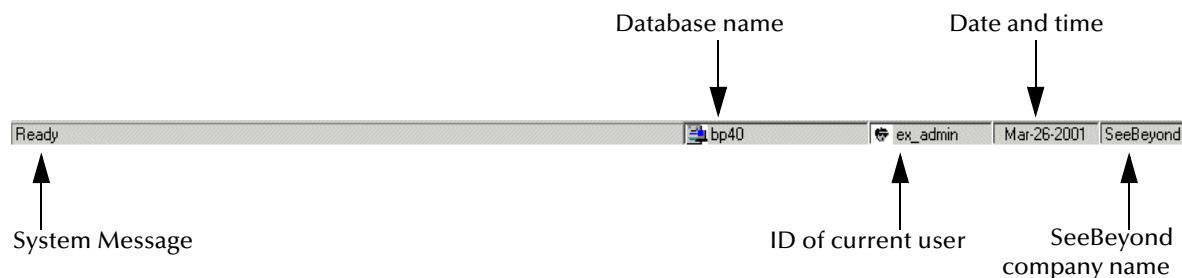


For information on how security is set up, see [“Assigning Access Privileges to Trading Partner Profiles”](#) on page 225.

2.2.7 Understanding the Status Bar

The status bar at the bottom of the e*Exchange Partner Manager window displays the name of the database instance you connected to when you logged in, your user ID, the current date, and the SeeBeyond company name (see Figure 17).

Figure 17 e*Exchange Partner Manager Status Bar



2.3 User Preferences

Certain aspects of e*Exchange Partner Manager, such as some report information and the paths to certain files, can be tailored for each user as User Preferences.

To set user preferences

- 1 On the **Functions** menu, click **User Preferences**.
The **User Preferences** dialog box appears (see Figure 18).
- 2 Enter **Report Path**, **Report Title**, and **Miscellaneous** information. For more information, see Table 11.
- 3 Click **OK** to save and close.

Figure 18 User Preferences

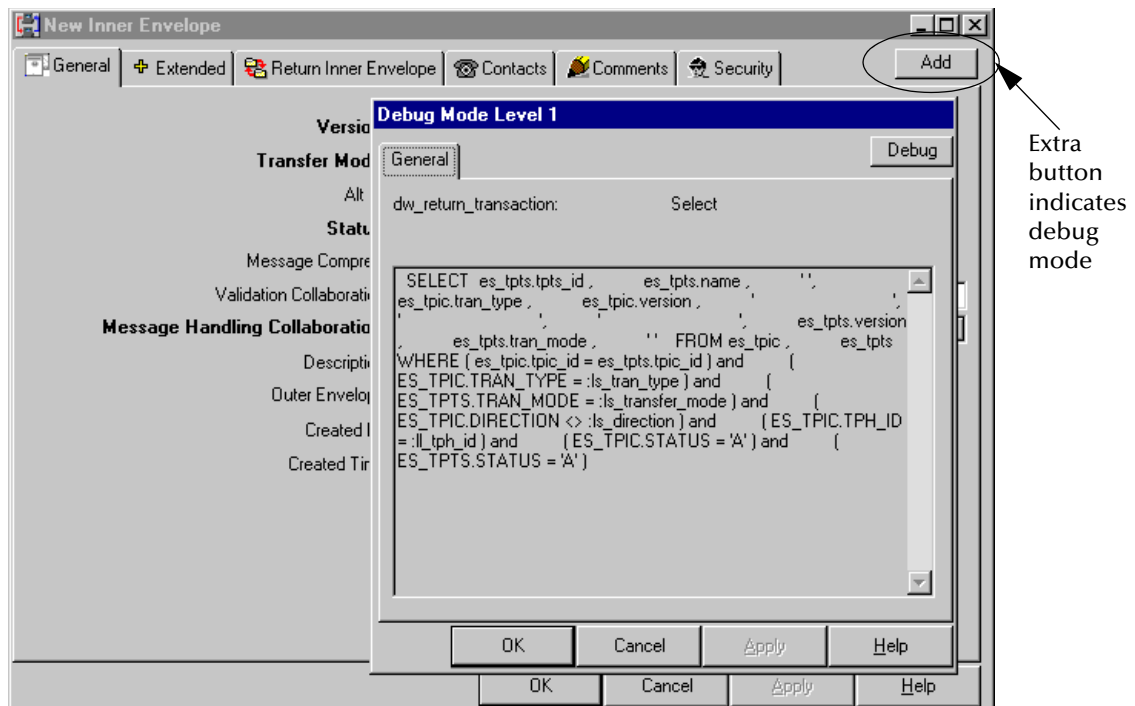
Table 11 User Preferences

Box	Description
Database Type	The database type is displayed, and cannot be changed.
Database Version	The version of the database software is displayed, and cannot be changed.
Report Path	The full path for the location in which the Crystal Reports files will be stored; for example, c:\eXchange\ePM . If no value is recorded in this box, the system uses the report path set up in the System Defaults dialog box.
Report Title	The title to be displayed at the top of system reports. If no value is recorded in this box, the system uses the report title set up in the System Defaults dialog box.

Table 11 User Preferences (Continued)

Box	Description
Debug	This offers the option of turning on a troubleshooting feature. To turn on the debug feature, select this check box. In debug mode, you can view the code when running e*Xchange Partner Manager (see Figure 19).
Online	If you select Debug, Online is the default. This displays the code in a dialog box (see Figure 19). If you prefer to write the code to a file, clear this check box. The code is written to the file stcapp.dbg in your e*Xchange root folder.
Debug File	If you want the code to be written to a different file, type the new file name.
Temp Path	If you want the debug file to be stored in a location other than the e*Xchange root folder, type the new path.

Figure 19 Running e*Xchange Partner Manager in Debug Mode



If you select Debug Mode in your User Preferences, you will be able to view code when running e*Xchange Partner Manager, as shown in Figure 19.

Web Interface: Overview and Administration

e*Xchange includes a Web interface so that you can configure trading partners remotely, over the Web.

From the Web interface you can complete the activities listed below.

- Profile Management; you can add, edit, or delete any of the four layers that comprise a trading partner profile:
 - ♦ Company layer
 - ♦ Trading partner layer
 - ♦ eBusiness protocol layer (inbound or outbound)
 - ♦ Message profile layer

In addition, you can set or change security individually for any one of these layers.

- Message Tracking:
 - ♦ View any messages that have been processed by e*Xchange
 - ♦ Use the various search fields to narrow down your search before viewing message details
 - ♦ For any message, view an error list, extended attributes, or actual text of the original message, enveloped message, or acknowledgment message.
 - ♦ Resend certain message that have errored out.
- System Administration
 - ♦ Set system defaults
 - ♦ Add or modify values to system code tables
- User Administration
 - ♦ Add users
 - ♦ Expire and reinstate user access rights
 - ♦ Create user groups
 - ♦ Assign users to user groups

Note: In the Web interface, an asterisk (*) on a field indicates that it is a required field.

3.1 Supported Browsers

The e*Xchange Partner Manager Web interface works with the following browser versions:

- Microsoft Internet Explorer 5.0
- Microsoft Internet Explorer 5.5

3.2 User Permissions: An Overview

There is only one user for the e*Xchange Web interface at the database level; the schema/database owner. This user is assigned to all default application administration groups. The schema/database owner can set up additional users via the Web interface. These users are only created at the application level, and have no default database access privileges. When a new user logs in to the application, the application logs into the database as the schema owner and authenticates the new username and password from user information stored in the database tables.

The schema/database owner username and password are stored in the database connection definition file **epm.std**. This file is in XML format. Each database connection is described by a set of XML tags. The <username> and <password> tags store the encrypted version of the schema/database owner username and password. After initial installation, the value for each of those two tags is set to a default of six asterisks (*****). When the connection is called for the first time from the Web interface, the user is asked to enter the schema owner's username and password information. e*Xchange encrypts this information and stores it in the **epm.std** file. Once those encrypted values are set up, any application users that have been defined in the database can log in to the Web interface directly. When each user logs on, e*Xchange verifies the username and password against the user information stored in the database tables.

This approach provides tighter security for the information stored in the e*Xchange schema/database than was available with e*Xchange Client for Windows. It also reduces the database-level privileges required for the schema/database owner. For Oracle, this allows for more than one schema per database instance.

When installing a second schema, make sure that tablespace names and locations are unique for the new schema.

3.3 Logging In to the e*Xchange Partner Manager Web Interface

To run the e*Xchange Partner Manager Web interface, you must specify your login ID, password, and the database instance you want to use.

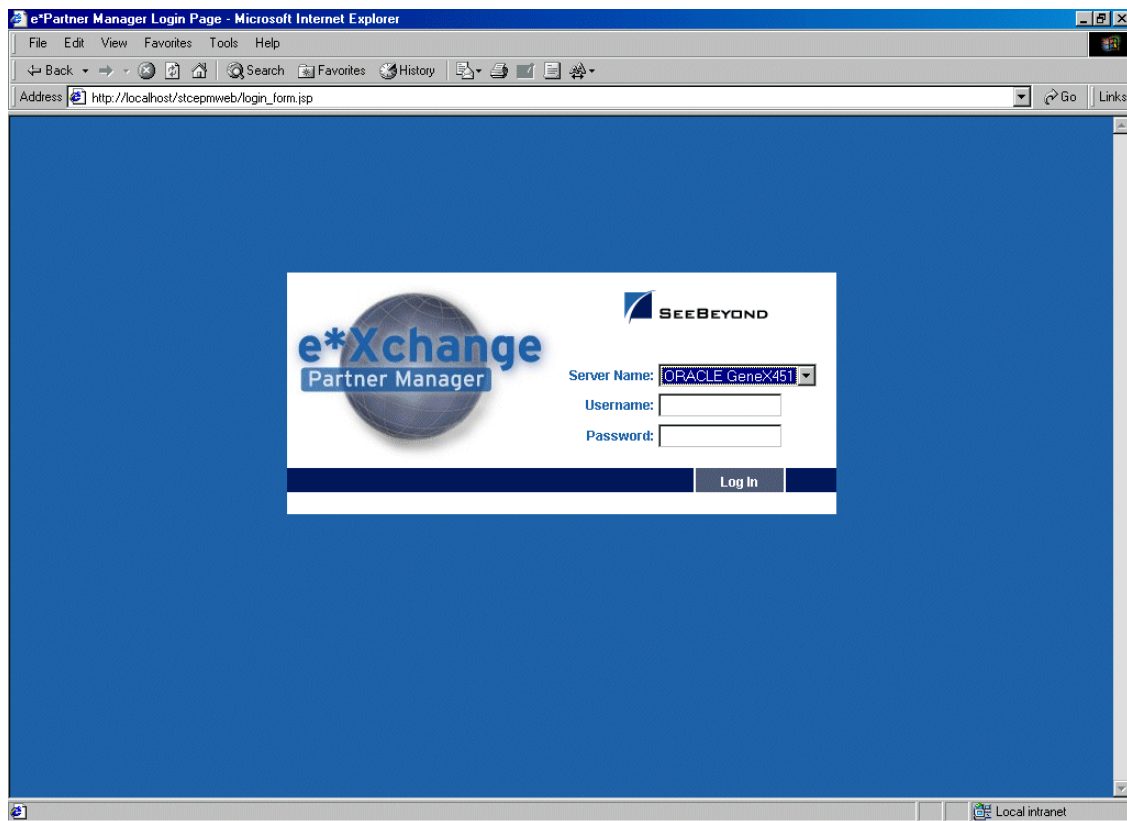
To log In to e*Exchange Partner Manager Web interface

- 1 Start Tomcat (run the file \eXchange\tomcat-3.2.1\bin\startup.bat).

Note: If you are using UDB, you must execute Tomcat as the schema owner; that is, you must either be logged in as the schema owner (ex_admin) or run the “runas” command in Windows, before running startup.bat.

- 2 Open your browser and go to the http://localhost/stcepmweb/login_form.jsp page.
- 3 The e*Exchange Partner Manager login page appears (see Figure 20).

Figure 20 Web Interface Login



- 4 Select the server from the list.
- 5 Enter the username and password.

Note: The username is case insensitive; the password is case sensitive.

- 6 Click **Log In**.
- 7 One of two things occurs:
 - ♦ If this is the first connection to the database, you must set up the password for the first time; refer to [“To set up your password for the first time” on page 43](#).
 - ♦ If you have logged in before, the Main page appears (see [Figure 24 on page 46](#)).

3.3.1 Setting Up Your Password for the First Time

When you log in for the first time, or after you have reset the password in the **epm.std** file (see [“Editing the epm.std File” on page 64](#)), e*Xchange verifies your database access rights and sets you up in the database as an e*Xchange Partner Manager user.

Note: To do this, you must be the schema/database owner.

To set up your password for the first time

- 1 Log in (see [“To log In to e*Xchange Partner Manager Web interface” on page 42](#)).
The Database Connection Information page appears (see Figure 21).

Figure 21 Database Connection Information

The screenshot shows a web browser window titled "e*Xchange Partner Manager - Microsoft Internet Explorer". The address bar shows "http://localhost/stcepmweb/controller.jsp". The page header includes the "e*Xchange Partner Manager" logo and the "SEEBEYOND" logo with links for "Help", "About e*Xchange", and "Log Out". The main content area is titled "Database Connection Information". Inside this area is a form titled "Connection Information" with the following fields and values:

- Connection Name: ORACLE GeneX451
- Connection String: jdbc:oracle:thin:@genwhittdell850:1521:GeneX451
- Username:
- Password:
- Confirm Password:

At the bottom of the form are three buttons: "Cancel", "Test Connection", and "Apply". The footer of the page contains the text: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved." The browser's status bar at the bottom shows "Done" and "Local intranet".

- 2 Type the schema/database owner username.
- 3 Type the schema/database owner password once, and then again to confirm.
- 4 Click **Test Connection**.

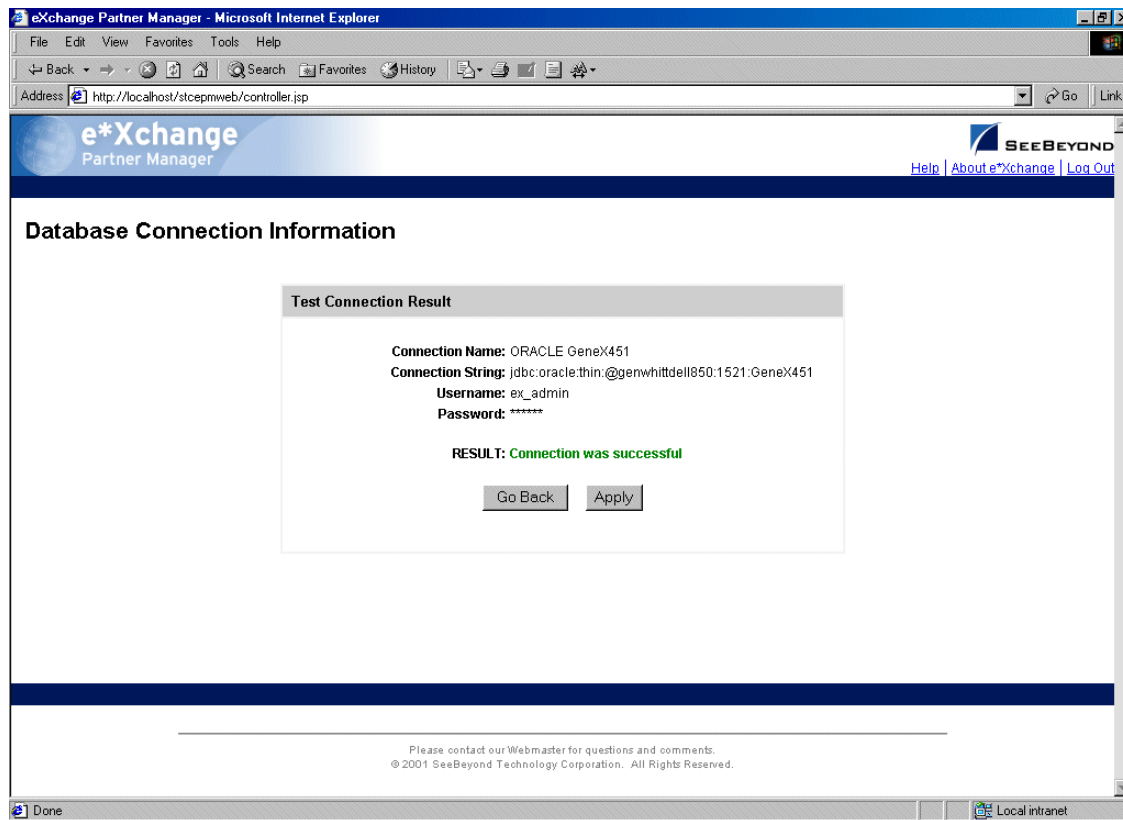
The Test Connection Result page appears (see Figure 22).

If you get a failure message, check the following:

- ♦ Is the database currently up and running?

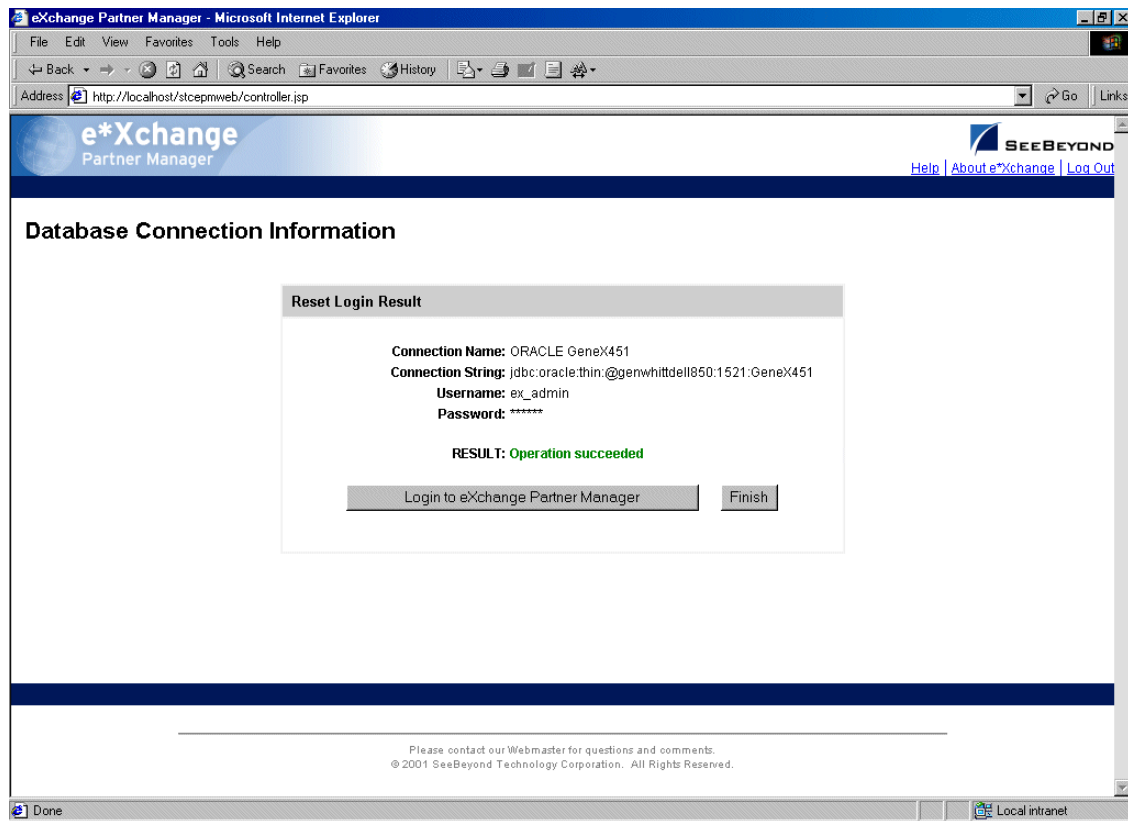
- ♦ Are the username and password correct? To test this, make sure that you can log in at the SQLPlus prompt.

Figure 22 Database Connection Information: Test Connection Result



- 5 Click **Apply**.
- 6 The Database Connection Information: Reset Login Result page appears (see Figure 23).

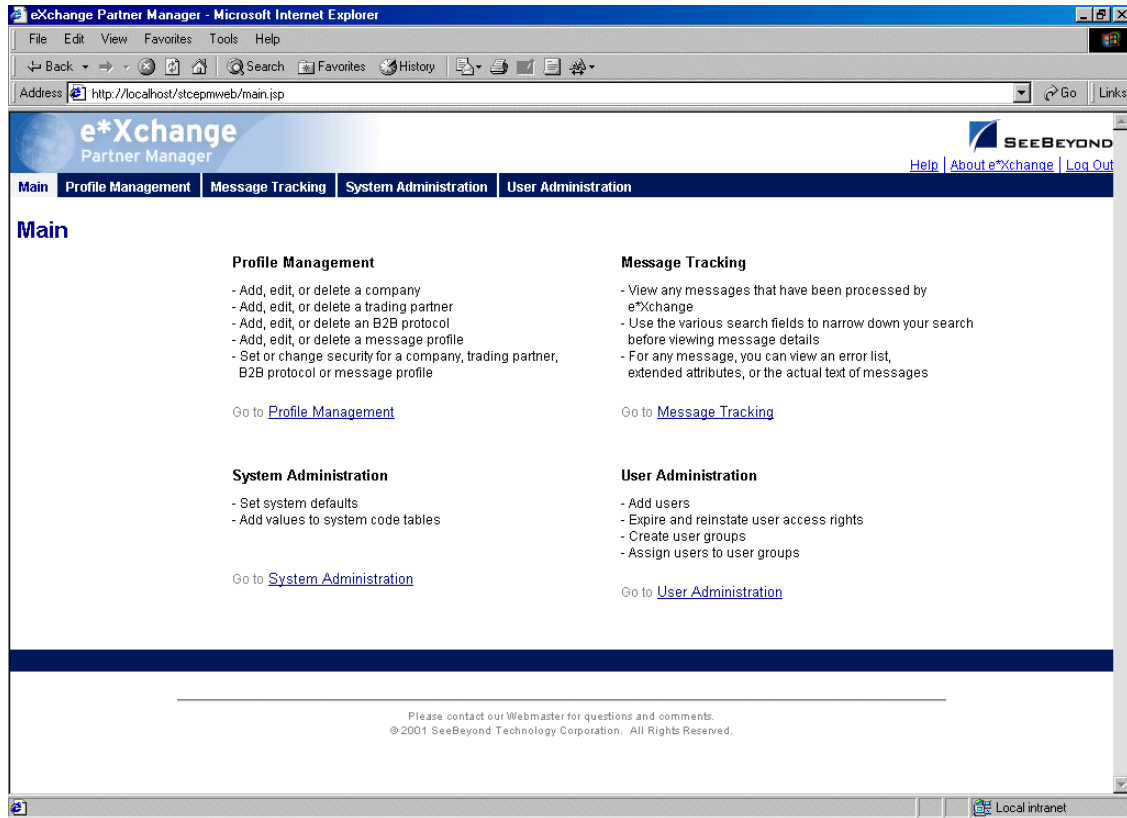
Figure 23 Database Connection Information: Reset Login Result



7 Click Login to e*Xchange Partner Manager.

The **Main** page appears (see Figure 24).

Figure 24 e*Xchange Partner Manager Web Interface Main Page



From this page you can access all the functions provided by the e*Xchange Partner Manager Web Interface. These break down into four main groups:

- Profile Management (see **[“Profile Management” on page 71](#)**)
- Message Tracking (see **[“Message Tracking Features” on page 151](#)**)
- System Administration (see **[“System Administration” on page 46](#)**)
- User Administration (see **[“User Administration” on page 54](#)**)

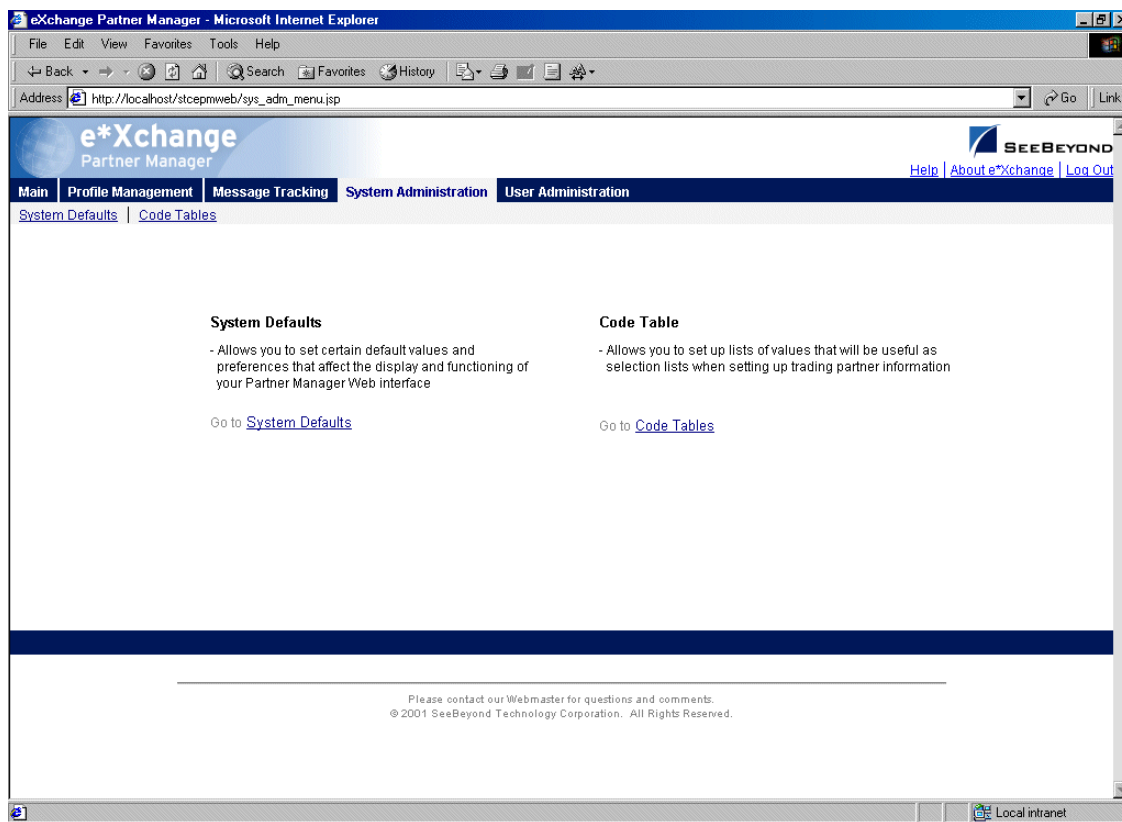
3.4 System Administration

The System Administration page allows you to perform the following administrative tasks, providing you have access rights as a member of the eX Administrator user group:

- Setting system defaults such as report title, the number of trading partner profiles to be cached in memory, and the shutdown time if the system is left idle.
- Setting up code tables so that you can add values to support a communications protocol other than HTTP, HTTPS, SMTP, and FTP (Batch).

From the Web Interface Main page, click **System Administration** to access the System Administration main page (see Figure 25).

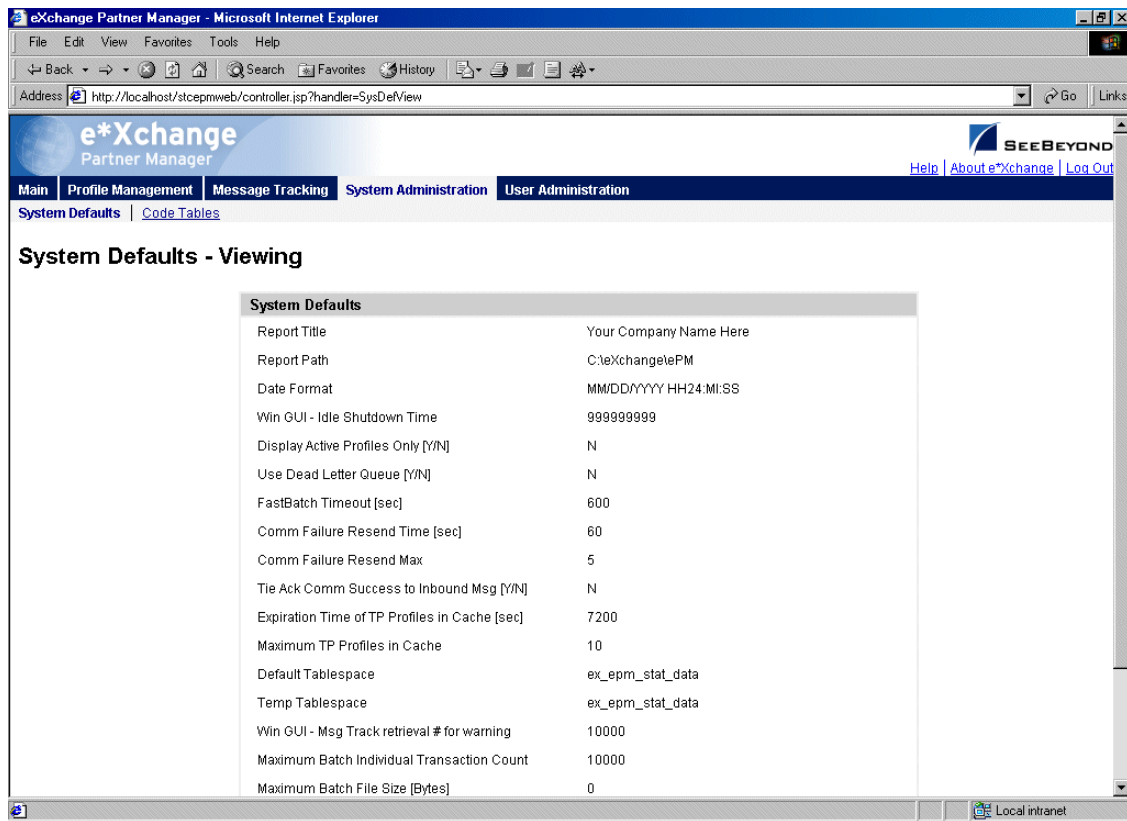
Figure 25 System Administration Main Page



3.4.1 System Defaults

From the System Administration Main page, click **System Defaults** to access the **System Defaults - Viewing** page (see Figure 26).

Figure 26 System Defaults - Viewing



To change system defaults

Follow the steps below if you need to change any of the default settings.

- 1 From the **System Defaults - Viewing** page, click **Edit** to access the **System Defaults - Editing** page (see Figure 27).

Note: You can only access this page if you are a member of the eX Administrator user group.

- 2 Change the values as needed.
For more information on specific fields, refer to Table 12.
- 3 Click **OK** to save the changes.

Figure 27 System Defaults - Editing

The screenshot shows the 'e*Exchange Partner Manager' web interface in a Microsoft Internet Explorer browser. The address bar shows 'http://localhost:stcepmweb/controller.jsp'. The page has a navigation menu with 'Main', 'Profile Management', 'Message Tracking', 'System Administration', and 'User Administration'. The 'System Administration' tab is selected, and the 'System Defaults' sub-tab is active. The main content area is titled 'System Defaults - Editing' and contains a table of system defaults.

System Defaults	
Report Title	* Your Company Name Here
Report Path	* C:\eXchange\PM
Date Format	* MM/DD/YYYY HH24:MI:SS
Win GUI - Idle Shutdown Time	* 999999999
Display Active Profiles Only [Y/N]	* <input type="checkbox"/> N
Use Dead Letter Queue [Y/N]	* <input type="checkbox"/> N
FastBatch Timeout [sec]	* 600
Comm Failure Resend Time [sec]	* 60
Comm Failure Resend Max	* 5
Tie Ack Comm Success to Inbound Msg [Y/N]	* <input type="checkbox"/> N
Expiration Time of TP Profiles in Cache [sec]	* 7200
Maximum TP Profiles in Cache	* 10
Default Tablespace	* ex_epm_stat_data
Temp Tablespace	* ex_epm_stat_data
Win GUI - Msg Track retrieval # for warning	* 10000
Maximum Batch Individual Transaction Count	* 10000
Maximum Batch File Size [Bytes]	* 0

Table 12 System Defaults - Viewing: Fields

Name	Description
Report Title	The standard title to be listed on all reports generated from the e*Exchange Partner Manager.
Report Path	The name of the drive and folder that contains reports that can be generated from the e*Exchange Partner Manager. Note: Installation includes default reports, stored in the main e*Exchange folder set up during installation. If you accepted the default, this is C:\eXchange\PM. Be sure to update the report path appropriately.
Date Format (Oracle only)	The date format used in the database and used for all dates displayed in the e*Exchange Partner Manager. The default is displayed; you can change it to any other date format supported by Oracle.
Idle Shutdown Time	The number of seconds of keyboard or mouse inactivity before e*Exchange Client for Windows is closed if it is not being used. The default is 999999999 seconds. Note: To change the idle shutdown time for the Web interface, change the setting in the web.xml file. For more information, refer to “Extending the Session Inactivity Setting” on page 67 .
Display Active Profiles Only	Select this check box to display only active trading partner profiles in the e*Exchange Partner Manager. If this box is not selected, all trading partner profiles, active or inactive, will be displayed in the Partner Manager.

Table 12 System Defaults - Viewing: Fields (Continued)

Name	Description
Use Dead Letter Queue (X12 only)	Set this field to Y to send messages to the Dead Letter Queue if e*Xchange encounters any of the following errors with a message: <ul style="list-style-type: none"> - Invalid interchange information in a message from the trading partner - Invalid data in the ST/SE segments in a message from the trading partner - Duplicate message, either inbound or outbound Note: If you set this to Y, you must create a BOB or e*Way component in the e*Xchange e*Gate schema to subscribe to the eX_Error Event. If set to N, the Dead Letter Queue is not used.
FastBatch Timeout	The maximum amount of time that items for a batch will be held before being sent out. As soon as e*Xchange receives all the messages for a batch, the batch is sent out. However, if one or more messages for a specific batch does not reach e*Xchange for any reason (for example, because of errors), the incomplete batch is sent out when the FastBatch Timeout value is reached.
Comm Failure Resend Time (RosettaNet 2.0 only)	For messages sent via HTTP or HTTPS, this controls the resend time for messages if the HTTP or HTTPS post was not successful.
Comm Failure Resend Max (RosettaNet 2.0 only)	For messages sent via HTTP or HTTPS, this controls the number of times a message will be resent if the HTTP or HTTPS post was not successful.
Tie Ack Comm Success to Inbound Message (RosettaNet 2.0 only)	If you set this to Y, e*Xchange Partner Manager stores incoming messages sent by HTTP or HTTPS, sends the acknowledgment back to the trading partner, and waits to ensure that the HTTP or HTTPS post was successful before sending the message on to the internal system.
Expiration Time of TP Profiles in Cache	The amount of time for which a trading profile held in memory cache is used before being refreshed. Default: 7200 seconds (2 hours). <ul style="list-style-type: none"> - If you do not want TP profiles to be cached in memory, set this value to 0. - If you do not want TP profiles to be refreshed at all once cached in memory for the session, set this value to -1.
Maximum TP Profiles in Cache	The maximum number of trading partner profiles to be held in memory. If a greater number of trading partner profiles is accessed during one session, the profile that has been in memory longest is discarded. Caching of trading partner profiles speeds up performance by reducing interaction with the database. Default: 10. If you want all profiles to be stored in cache, with no upper limit, set this value to 0 and ensure that a valid expiration time is set for Expiration Time of TP Profiles in Cache.
Default Tablespace (Oracle only)	The default location where database objects will be created for the user if not explicitly defined in the Create statement in the database installation script (this is assigned to database users).
Temp Tablespace (Oracle only)	The default location where database temporary processing and sorting operations will be performed.

Table 12 System Defaults - Viewing: Fields (Continued)

Name	Description
Win GUI - Msg Track retrieval # for warning	The maximum number of messages allowed in e*Xchange Client for Windows for the Message Tracking Details list before e*Xchange provides a warning, allowing the user the option to redefine search criteria to make a smaller list. Note: This setting does not affect the Web interface.
Maximum Batch Individual Transaction Count	For batched transactions only: the maximum number of transactions of one type (for example, X12 850) that can be sent in one batch. Note: Maximum Batch Individual Transaction Count and Maximum Batch File Size work together to ensure batches are not too large. The first of these limits that is reached determines the maximum batch size.
Maximum Batch File Size	For batched transactions only: the maximum total file size for one batch. Note: Maximum Batch Individual Transaction Count and Maximum Batch File Size work together to ensure batches are not too large. The first of these limits that is reached determines the maximum batch size.

3.4.2 Code Tables

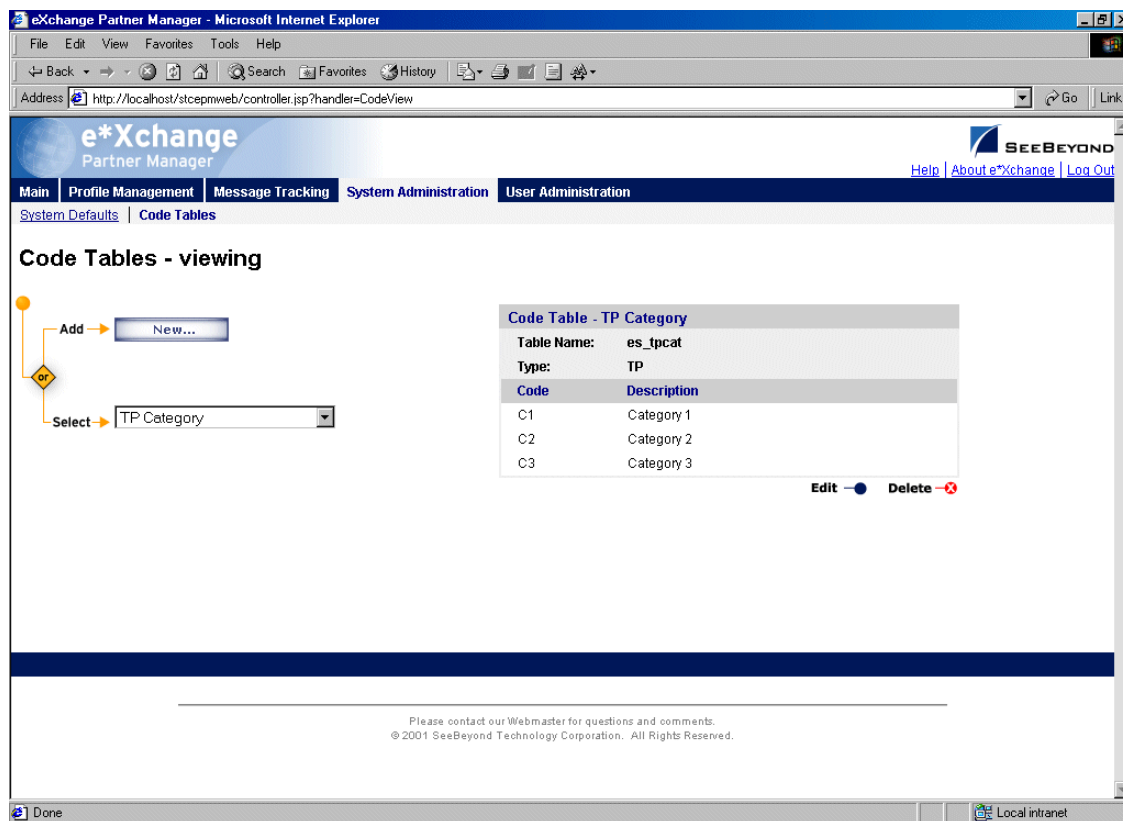
If you need to set up the Web interface to support an additional communications protocol, you must add certain code tables.

Existing code tables are supplied with the default Web interface. Do not change these values unless advised by technical support personnel.

You can only make changes to code tables if you are a member of the eX Administrator user group.

From the System Administration Main page, click **Code Tables** to access the **Code Tables - Viewing** page (see Figure 28).

Figure 28 Code Tables - Viewing



To add a code table

- 1 From the **Code Tables - Viewing** page, click **New** to access the **Code Tables - adding** page (see Figure 29).

Note: You can only access this page if you are a member of the eX Administrator user group.

- 2 Enter the values as needed.
For more information on specific fields, refer to Table 13.
- 3 Click **OK** to save the changes.

Figure 29 Code Tables - Adding

The screenshot shows the 'e*Exchange Partner Manager' web application running in a Microsoft Internet Explorer browser. The address bar shows 'http://localhost/stcepmweb/controller.jsp'. The application has a navigation menu with 'Main', 'Profile Management', 'Message Tracking', 'System Administration', and 'User Administration'. The 'System Administration' section is active, and the 'Code Tables' sub-section is selected. The main content area is titled 'Code Tables - adding' and contains a 'New Code Table' form. This form has three input fields: 'Table Name:', 'Type:', and 'Description:', each with an asterisk indicating it is a required field. Below these fields is a legend: '* = Required Fields'. To the right of the form is a table with two columns: 'Code' and 'Description'. The table has five empty rows for data entry. Below the table is a link that says 'Click for more rows...'. At the bottom right of the form are 'OK' and 'Cancel' buttons. The footer of the page contains a disclaimer: 'Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved.'

Table 13 Code Tables: Fields

Name	Description
Table Name	A short name for the code table; for example, the table name for the Error Severity table is ER. The table name must be unique.
Type	A description of the type of table; for example, the type for the Error Severity table is "severity." The table type must be unique.
Description	A short description of the code table. This is the name by which the code table is sorted when it is added to the code tables list and displayed in the left pane.
Code/Description	Each line in the code table includes the following information: <ul style="list-style-type: none"> Code-The code assigned to a specific list item. Description-The description of a specific list item. This is the value that will show up on the system list. To add more rows, as needed, click on the Click for more rows... link.

To edit a code table

- 1 From the **Code Tables - Viewing** page, select a code table, and then click **Edit** to access the **Code Tables - editing** page (see Figure 30).
- 2 Edit the values as needed.

For more information on specific fields, refer to Table 13.

- 3 Click **OK** to save the changes.

Figure 30 Code Tables - Editing

The screenshot shows the 'e*Exchange Partner Manager' web application running in a Microsoft Internet Explorer browser. The address bar shows 'http://localhost/stceprweb/controller.jsp'. The application has a navigation menu with 'Main', 'Profile Management', 'Message Tracking', 'System Administration', and 'User Administration'. The 'Code Tables' section is active, showing a form titled 'Edit Code Table - TP Category'. The form has three input fields: 'Table Name:', 'Type:', and 'Description: *'. Below these is a legend: '* = Required Fields'. To the right is a table with two columns: 'Code' and 'Description'. The table has six rows, each with empty input fields. At the bottom of the form are 'OK' and 'Cancel' buttons. A footer message reads: 'Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved.'

3.5 User Administration

e*Exchange controls user access to various features by means of users and groups. Access rights to the user interface can be assigned to specific users. For convenience, you can also create user groups and assign users to them. By granting access to a group, you automatically grant access to all users within that group.

e*Exchange comes with several default user groups:

- User Administration
- eX Administrator
- ePartner Manager Access
- Partner Management

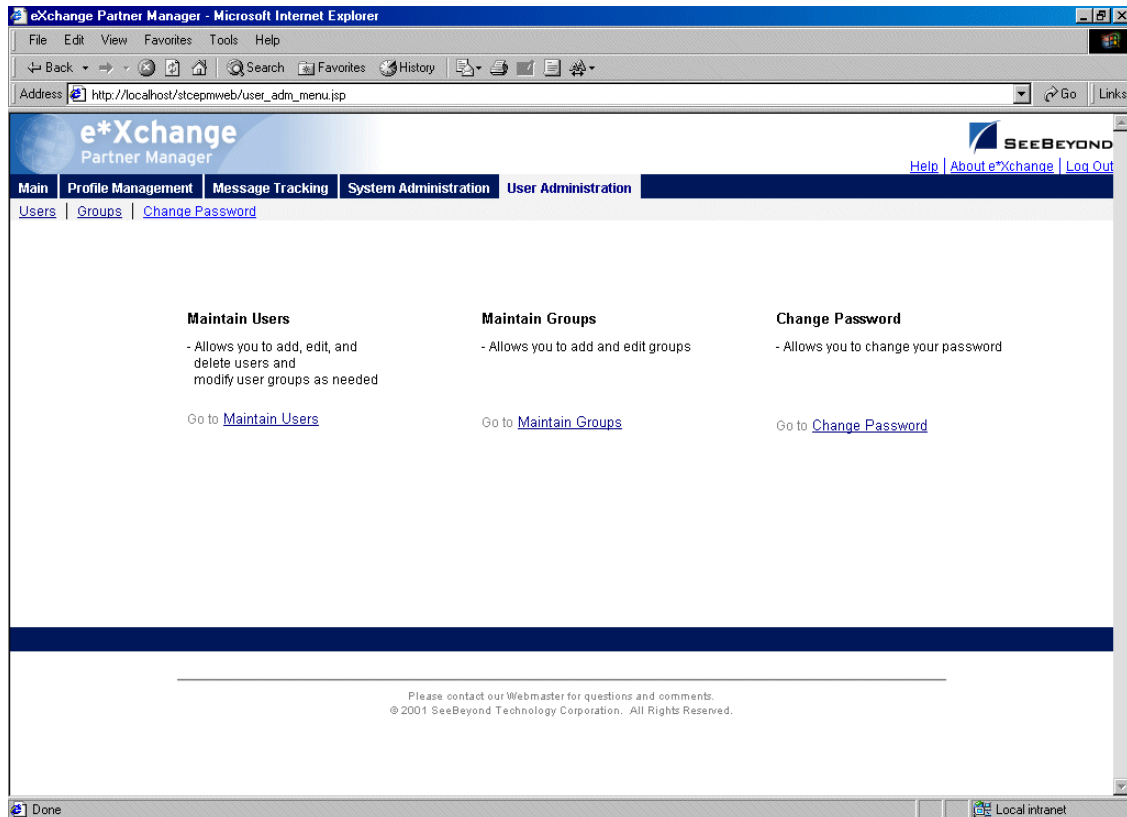
The User Administration features allow you to do the following:

- Add users
- Expire and reinstate user access rights

- Create user groups
- Assign users to user groups

From the Main page, click **User Administration** to access the User Administration main page (see Figure 31).

Figure 31 User Administration Main Page



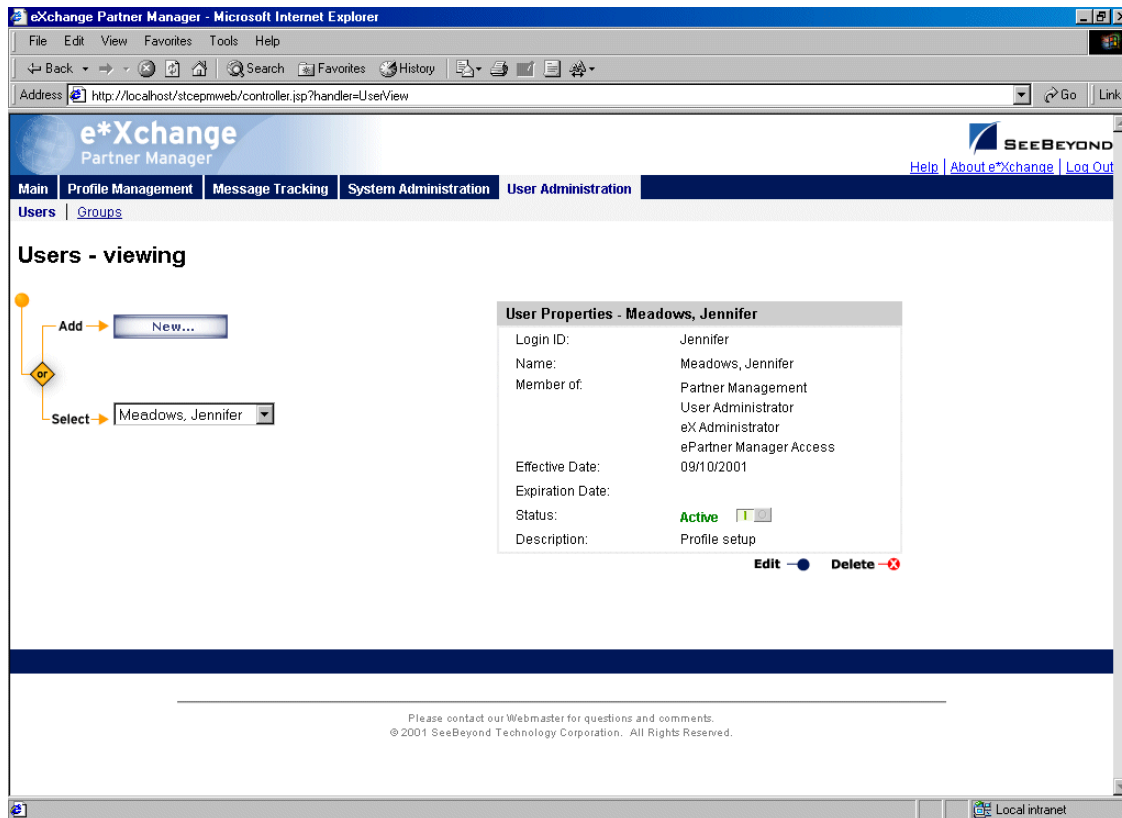
Some of these selections might not be available to you, as follows:

- If you are logged in as the schema owner, the Change Password feature is not available to you. You must change your password in the database itself.
- If you are not a member of the User Administrator group, the Maintain Users and Maintain Groups features are not available to you. You do not have sufficient access rights for these activities.

3.5.1 Working With Users

From the **User Administration** main page, click Maintain Users to access the **Users** page (see Figure 32).

Figure 32 Users



From the **Users** page you can complete the following activities:

- Add a user (see [“To add a user” on page 56](#))
- Select a user: choose from the drop-down list. The user properties are displayed on the right side of the page.
- Edit properties for the selected user; first select the user that you want to edit, and then click the **Edit** button to access the **Users - editing** page (see [“To edit user properties” on page 58](#))
- Delete the selected user (see [“To delete a user” on page 59](#))
- Activate or deactivate the selected user (see [“To activate or inactivate a user” on page 59](#))

To add a user

- 1 From the **Users** page, click the **New** button to access the **Users - adding** page. (see Figure 33).

Figure 33 Users - Adding

The screenshot shows the 'e*Exchange Partner Manager' web interface in a Microsoft Internet Explorer browser. The address bar shows 'http://localhost:8080/stcepmweb/controller.jsp'. The page has a navigation bar with tabs: Main, Profile Management, Message Tracking, System Administration, and User Administration. The 'User Administration' tab is active, and the 'Users' sub-tab is selected. The main content area is titled 'Users - adding' and contains a 'New User' form. The form has the following fields: First Name (required), Last Name (required), Login ID (required), Password (required), Confirm Password (required), Effective Date (with a date picker showing 09/23/2001), Expiration Date (with a date picker), and Description. To the right of the form is a list of 'Available groups' (User Administrator, eX Administrator, ePartner Manager Access, Partner Management) and a 'Selected Groups' box. A double arrow button is between the two boxes. At the bottom of the form are 'OK' and 'Cancel' buttons. A footer note says 'Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved.'

- 2 Enter or select values for the user.
For more information on specific fields, refer to Table 14.
- 3 Click **OK** to save the new information and return to the **Users - viewing** page.
The new user information is now displayed, as shown in Figure 34.

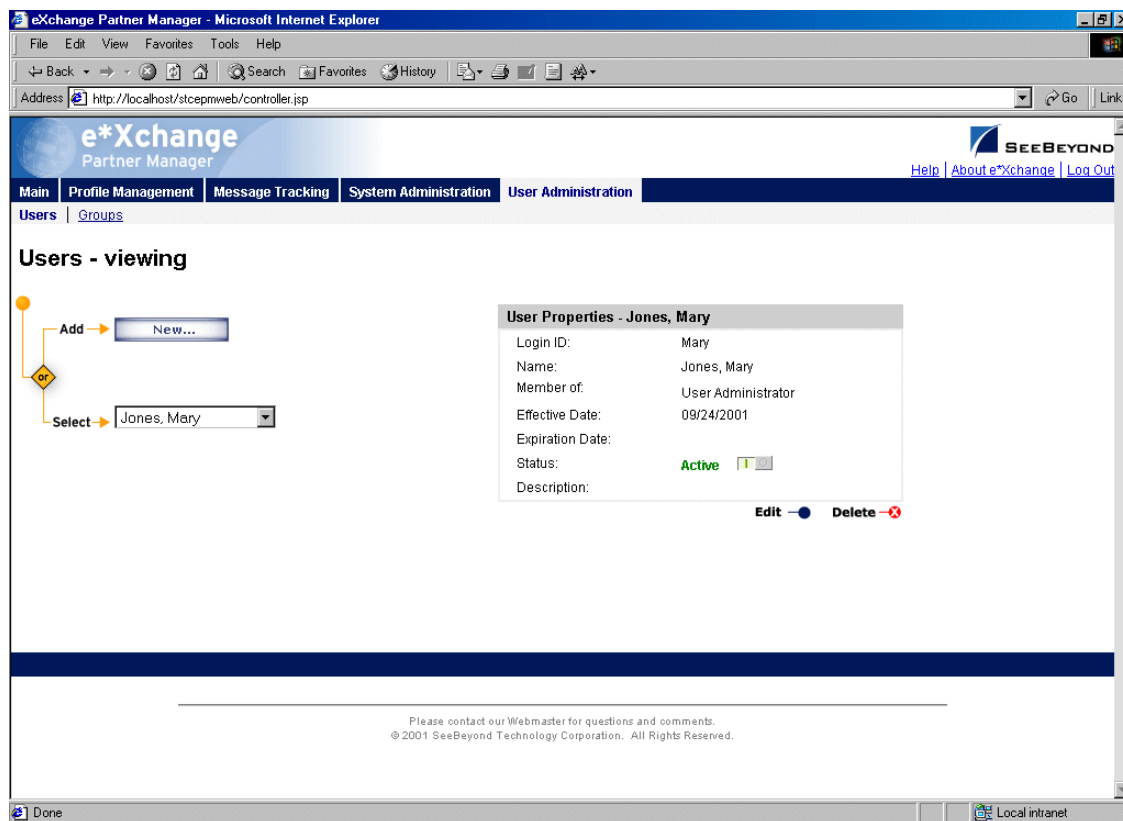
Table 14 Users - Adding: Fields

Name	Description
First Name	The user's first name.
Last Name	The user's last name.
Login ID	The user's login ID for the server on which e*Xchange is installed.
Password	The password the user must enter to access the server on which e*Xchange is installed. Maximum password length is 20 characters.
Confirm Password	You must type the password a second time.
Effective Date	The first date on which the user can log in to e*Xchange Partner Manager. Default: the current date.
Expiration Date	The date on which the user's access rights expire. On this date, the user will not be able to log in to e*Xchange. Defaults to 00/00/00, which means that no expiration date is currently set.

Table 14 Users - Adding: Fields (Continued)

Name	Description
Description	A description of the user; for example, you could add a statement of the primary tasks or responsibilities performed by this user.

Figure 34 Users Page Showing User Information



To edit user properties

- 1 From the **Users** page, select the user from the drop-down list.
- 2 Click the **Edit** button to access the **Users - editing** page. (see Figure 35).

Figure 35 Users - editing

The screenshot shows the 'e*Exchange Partner Manager' web interface in a Microsoft Internet Explorer browser. The address bar shows 'http://localhost/stcepmweb/controller.jsp'. The page has a navigation bar with tabs: Main, Profile Management, Message Tracking, System Administration, and User Administration. The 'User Administration' tab is active, and the 'Users' sub-tab is selected. The main content area is titled 'Users - editing' and contains a form for editing a user named 'Jennifer'. The form has the following fields: First Name (Jennifer), Last Name (Meadows), Login ID (Jennifer), Password (masked), Confirm Password (masked), Effective Date (09/10/2001), Expiration Date (empty), and Description (Profile setup). There are also 'Available groups' and 'Selected Groups' lists. The 'Selected Groups' list contains: Partner Management, User Administrator, eX Administrator, and ePartner Manager Access. At the bottom of the form are 'OK' and 'Cancel' buttons. A footer note says: 'Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved.'

- 3 Edit the user properties as needed.
- 4 Click **OK** to save changes and return to the **Users** page.

To delete a user

- 1 On the **Users - viewing** page, select the user from the drop-down list.
- 2 Click the **Delete** button.

A warning message appears asking if you are sure you want to delete.

- 3 Click **OK**.

The user is deleted.


To activate or inactivate a user

- 1 On the **Users - viewing** page, select the user from the drop-down list.

The user properties are displayed on the right side of the page.

- 2 In the **Status** field, toggle the Active/Inactive graphic to change the status. Values are as follows:

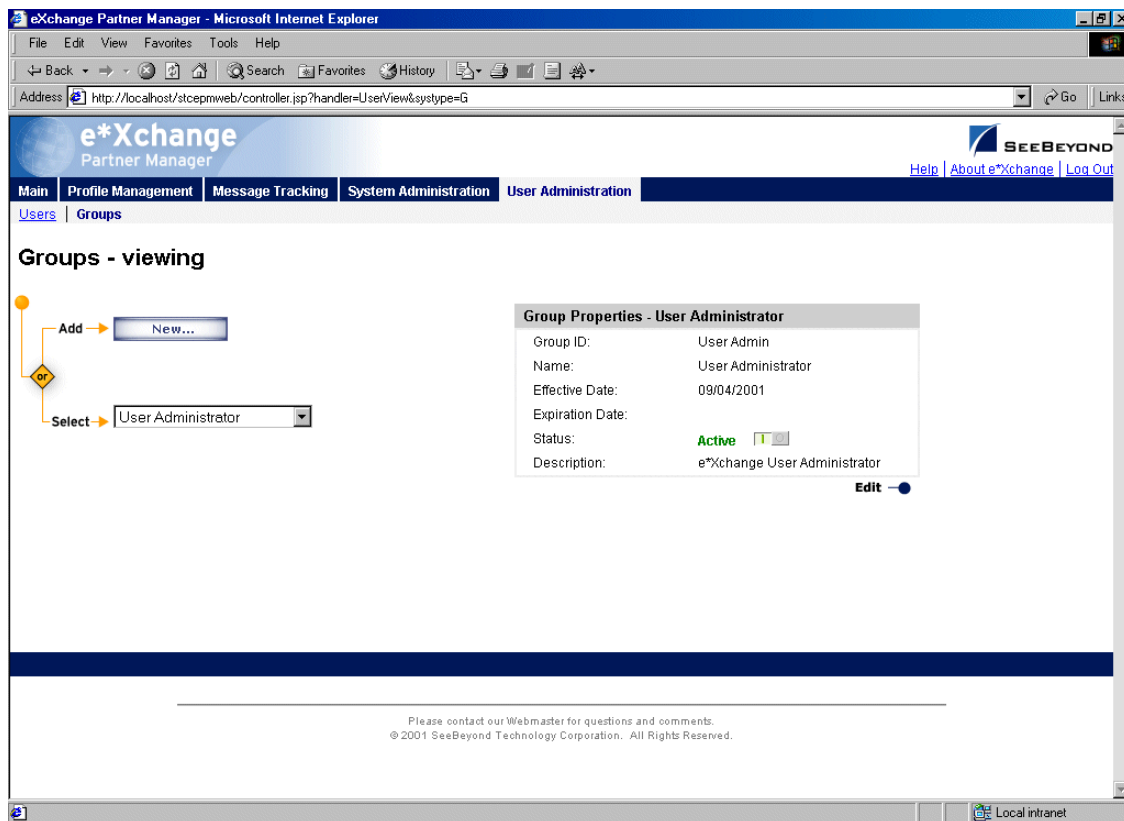
- ♦  User is active: click to deactivate

- ♦  User is inactive: click to reactivate. You are offered the option to cascade the current access rights to the lower levels.

3.5.2 Working With Groups

From the **User Administration** main page, click Maintain Groups to access the **Groups - viewing** page (see Figure 36).

Figure 36 Groups - viewing



From the **Groups - viewing** page you can complete the following activities:

- Add a group (see [“To add a group” on page 61](#))
- Select a group: choose from the drop-down list. The group properties are displayed on the right side of the page.
- Edit properties for the selected group; first select the group that you want to edit, and then click the **Edit** button to access the **Groups - editing** page (see [“To edit group properties” on page 62](#))
- Activate or deactivate the selected group (see [“To activate or inactivate a group” on page 63](#))

To add a group

- 1 From the **Groups - viewing** page, click the **New** button to access the **Groups - adding** page. (see Figure 37).

Figure 37 Groups - adding

The screenshot displays the 'e*Exchange Partner Manager' web application in a Microsoft Internet Explorer browser window. The address bar shows the URL 'http://localhost/stcepmweb/controller.jsp'. The application's navigation bar includes tabs for 'Main', 'Profile Management', 'Message Tracking', 'System Administration', and 'User Administration'. The 'User Administration' tab is selected, and the 'Groups' sub-link is active. The main content area is titled 'Groups - adding' and contains a 'New Group' form. The form has the following fields: 'Name' (required), 'Login ID' (required), 'Effective Date' (pre-filled with '09/23/2001' and a date format hint '[mm/dd/yyyy]'), 'Expiration Date' (with a date format hint '[mm/dd/yyyy]'), and 'Description'. A legend at the bottom of the form states '* = Required Fields'. The form has 'OK' and 'Cancel' buttons. The footer of the page includes a disclaimer: 'Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved.'

- 2 Enter or select values for the group.
- 3 For more information on specific fields, refer to Table 15.
- 4 Click **OK** to save the new information and return to the **Groups - viewing** page.

The new group information is now displayed.

Table 15 Groups - Adding: Fields

Name	Description
Name	The name of the user group. This is the name that will appear in the Groups list.
Login ID	An identification code for the user group.
Effective Date	The first date on which a user assigned to this user group can log in to e*Xchange. Default: the current date.
Expiration Date	The date on which the group's access rights expire. On this date, users assigned to this group will not be able to log in to e*Xchange unless they are also assigned to another group that has access. Defaults to 00/00/00, which means that no expiration date is currently set.
Description	A description of the primary tasks or responsibilities performed by users associated with this group.

To edit group properties

- 1 From the **Groups - viewing** page, select the group from the drop-down list.
- 2 Click the **Edit** button to access the **Groups - editing** page. (see Figure 38).

Figure 38 Groups - Editing

The screenshot shows the e*Xchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows the URL: http://localhost/stcepmweb/controller.jsp. The page title is "e*Xchange Partner Manager". The navigation menu includes: Main, Profile Management, Message Tracking, System Administration, and User Administration. The "User Administration" tab is selected, and the "Groups" sub-tab is active. The main content area is titled "Groups - editing". A modal dialog box titled "Edit Group - User Admin" is displayed in the center. It contains the following fields:

- Name: *User Administrator
- Login ID: User Admin
- Effective Date: *09/04/2001 (mm/dd/yyyy)
- Expiration Date: (mm/dd/yyyy)
- Description: e*Xchange User Administrator

At the bottom of the dialog, there is a legend: * = Required Fields, and buttons for OK and Cancel. The footer of the page states: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved."

- 3 Edit the group properties as needed.
- 4 Click **OK** to save changes and return to the **Groups** page.

To activate or inactivate a group

- 1 On the **Groups - viewing** page, select the group from the drop-down list.
The group properties are displayed on the right side of the page.
- 2 In the **Status** field, toggle the Active/Inactive graphic to change the status. Values are as follows:



- ♦ Group is active: click to deactivate



- ♦ Group is inactive: click to reactivate. You are offered the option to cascade the current access rights to the lower levels.

3.6 Changing Your Password

It is a good idea to change your password from time to time.

Note: *If you are logged in as the schema owner, this option is not available to you. You must change your password in the database itself.*

Follow the procedure below to change your password.

To change your password

- 1 From the Web Interface main page, go to **User Administration**.
- 2 From the User Administration main page, click **Change Password** to access the Change Password page (see Figure 39).

Figure 39 Change Password

The screenshot shows a web browser window titled "e*Xchange Partner Manager - Microsoft Internet Explorer". The address bar shows "http://localhost/stcepmweb/user_passwd_form.jsp". The page has a navigation bar with tabs: Main, Profile Management, Message Tracking, System Administration, and User Administration. Under "User Administration", there are links for Users, Groups, and Change Password. The "Change Password" page displays a form for "Login ID - Jennifer". The form has three input fields: "Old Password:", "New Password:", and "Confirm New Password:". Below the fields are "OK" and "Cancel" buttons. At the bottom of the page, there is a footer with the text: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved."

Note: This option is also available as a link from the Users and Groups pages.

- 3 Type the old password.
- 4 Type the new password.
- 5 Retype the new password for verification.
- 6 Click **OK**.

e*Xchange displays the following message:

Password for user: [name of current user] has been changed successfully.

3.7 Editing the epm.std File

Installation of the e*Xchange Web interface automatically creates a file, **epm.std**, which contains the information required so that the Web interface can access your database.

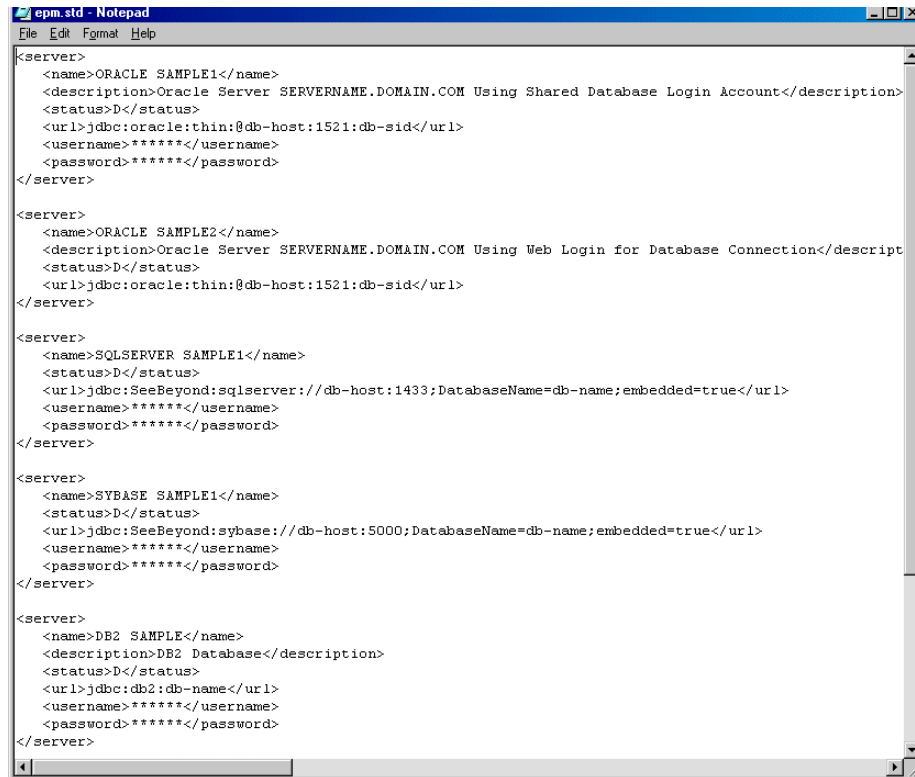
The default file includes sample entries for each database type. In addition, the database value that you enter during the installation process are used to create a new, valid entry for your database. If you want to add access to additional databases, or change the settings for any reasons, you can edit the settings file directly.

The default location for this file is:

`\eXchange\tomcat-3.2.1\webapps\stcepmweb\web-inf`

A sample default entry in **epm.std** is shown in Figure 40.

Figure 40 Default Entries in epm.std File



```
<server>
  <name>ORACLE SAMPLE1</name>
  <description>Oracle Server SERVERNAME.DOMAIN.COM Using Shared Database Login Account</description>
  <status>D</status>
  <url>jdbc:oracle:thin:@db-host:1521:db-sid</url>
  <username>*****</username>
  <password>*****</password>
</server>

<server>
  <name>ORACLE SAMPLE2</name>
  <description>Oracle Server SERVERNAME.DOMAIN.COM Using Web Login for Database Connection</descript
  <status>D</status>
  <url>jdbc:oracle:thin:@db-host:1521:db-sid</url>
</server>

<server>
  <name>SQLSERVER SAMPLE1</name>
  <status>D</status>
  <url>jdbc:SeeBeyond:sqlserver://db-host:1433;DatabaseName=db-name;embedded=true</url>
  <username>*****</username>
  <password>*****</password>
</server>

<server>
  <name>SYBASE SAMPLE1</name>
  <status>D</status>
  <url>jdbc:SeeBeyond:sybase://db-host:5000;DatabaseName=db-name;embedded=true</url>
  <username>*****</username>
  <password>*****</password>
</server>

<server>
  <name>DB2 SAMPLE</name>
  <description>DB2 Database</description>
  <status>D</status>
  <url>jdbc:db2:db-name</url>
  <username>*****</username>
  <password>*****</password>
</server>
```

Each default entry includes the following XML tags:

- **SERVER** begin and end tag indicating that each entry lists a server.
- **NAME** tag for the server name (must be unique in the file).
- **DESCRIPTION** tag for a written description of the entry. This is for your information only.
- **STATUS** tag for the current status of the entry: D for deactivated or A for Active. An entry with a status of D does not show up on the **Server Name** drop-down list on the e*Xchange Web Interface login page.
- **URL** tag: the URL for access to the database. This is a string comprised of several elements. Replace **db-host:5000** with the host name and port number for the database, separated by a colon. Replace **db-name** with the Oracle SID name.
- **Username** tag: the user name for access to the database.
- **Password** tag: the password for access to the database.

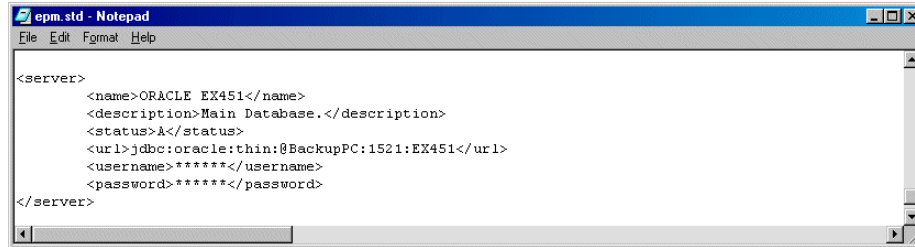
For example, actual values might be as follows:

- Server type is Oracle, server name is EX451

- Description tag is “Main Database.”
- Status is Active.
- Host name is BackupPC, port is 1521, Oracle SID is EX451.
- Username and password are both Jane.

With the above values, the entry in the **epm.std** file is shown in Figure 41.

Figure 41 Sample epm.std File



Note that the default value for both the username and password tags is six asterisks. For security reasons, username and password are never stored as plain text. Instead, when the schema/database owner sets the username and password in the e*Xchange Web interface, the encrypted values are stored in the **epm.std** file.

The schema/database owner has the option to test the database connection as well as setting the username and password. If the username and password are valid, e*Xchange allows the user access to the Web interface.

Some points to note about this file:

- You can reset the username and password by opening the file, deleting the encrypted values, and replacing them with six asterisks for each tag. The next time you log on, e*Xchange verifies the username and password against the database and stores the encrypted values in the **epm.std** file.
- The server name must be unique for the file; two identical server names are not allowed.
- Entries with a status of D are not available on the drop-down list on the Login page.
- If you remove the Username and Password tags from the entry in the **epm.std** file entirely, e*Xchange expects that the user logging in exists both at the application level (entries in the user tables in the e*Xchange database) and also at the database level.

3.8 Extending the Session Inactivity Setting

The length of time an inactive database connection is kept open before timing out is determined by a setting in the **web.xml** file. If you want to extend (or reduce) the time your connection is kept open when you are not using it, you can do so by changing this setting.

The **web.xml** file is located in the following folder:

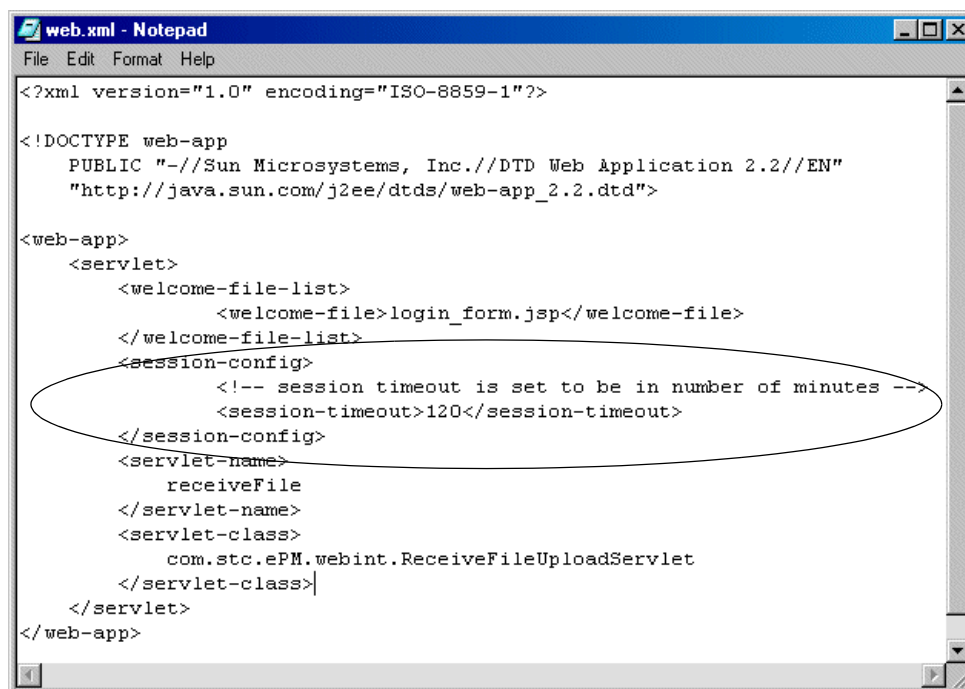
\eXchange\tomcat-3.2.1\webapps\stcepmweb\web-inf

To change the session time

- 1 Open **\eXchange\tomcat-3.2.1\webapps\stcepmweb\web-inf\web.xml** in Notepad.

The session timeout value, in minutes, is set in the `session-timeout` tag. The default is 120 minutes (2 hours) (see Figure 42).

Figure 42 The web.xml File



- 2 Change the numerical setting for the session-timeout value.
- 3 Save the file.
- 4 Restart Tomcat and the Web interface.

3.9 Troubleshooting

This section includes tips for resolving problems that might occur when running e*Xchange.

UDB DB2 Troubleshooting

Table 16 Repository Manager Errors (UDB DB2)

Error	Possible Solution
<p>Error in log file: COM.ibm.db2.jdbc.DB2Exception: [IBM][CLI Driver][DB2/NT] SQL4304N Java stored procedure or user-defined function "EX451.DATETOUDB", specific name "SQL010913174148368" could not load Java class "udbtools", reason code "". SQLSTATE=42724</p>	<p>The file udbtools.class must be present on the server in the directory defined by the %DEBTEMPDIR%/function environment variable. Copy this file from \eXchange\eRM\DB2 to the appropriate directory on the server.</p>

Table 17 Web Interface Errors (UDB DB2)

Error	Possible Solution
<p>Error when accessing certain fields in the Web interface: COM.ibm.db2.jdbc.DB2Exception: [IBM][CLI Driver] CLI0150E Driver not capable. SQLSTATE=HYC00</p> <p><i>Note: This error occurs when accessing fields with a BLOB or CLOB data type.</i></p>	<p>You must run the e*Xchange back end and the Web interface on separate computers if you are using UDB DB2. This is because the Web interface uses JDBC and the back end uses ODBC. If you have already set them up on the same system, you can resolve the problem by editing the %DB2TEMPDIR%/db2cli.ini file. For more detailed information, refer to the <i>Creating the e*Xchange Database Schema - UDB</i> chapter of the e*Xchange Installation Guide.</p>
<p>Error 500 (java.lang.AbstractMethodError) when attempting to view message details in Message Tracking (see Figure 43)</p>	<p>Go to the directory specified by the %DB2TEMPDIR%/java12 environment variable and make sure there is an inuse file in the directory. If not, double-click the file usejdbc2.bat.</p>
<p>Error on login: Cannot connect to database. (see Figure 44 for user interface error, Figure 45 for Tomcat error)</p>	<p>The classes12.zip file (normally in \eXchange\lib) is not in your classpath environment variable. Resolution: add it to your classpath, restart Tomcat, and restart the Web interface.</p>
<p>Error on running any jsp page. (see Figure 46)</p>	<p>The tools.jar file is not in your classpath environment variable. Resolution: add it to your classpath, restart Tomcat, and restart the Web interface.</p>

Figure 43 Error 500 in Message Tracking

Error: 500

Location: /stcepmweb/controller.jsp

Internal Servlet Error:

```
javax.servlet.ServletException
    at org.apache.jasper.servlet.JspServlet.service(JspServlet.java:399)
    at javax.servlet.http.HttpServlet.service(HttpServlet.java:853)
    at org.apache.tomcat.core.ServletWrapper.doService(ServletWrapper.java:404)
    at org.apache.tomcat.core.Handler.service(Handler.java:286)
    at org.apache.tomcat.core.ServletWrapper.service(ServletWrapper.java:372)
    at org.apache.tomcat.core.ContextManager.internalService(ContextManager.java:797)
    at org.apache.tomcat.core.ContextManager.service(ContextManager.java:743)
    at org.apache.tomcat.service.connector.Ajp12ConnectionHandler.processConnection(Ajp12ConnectionHandler.java:166)
    at org.apache.tomcat.service.TcpWorkerThread.runIt(PoolTcpEndpoint.java:416)
    at org.apache.tomcat.util.ThreadPool$ControlRunnable.run(ThreadPool.java:498)
    at java.lang.Thread.run(Unknown Source)
```

Root cause:

```
java.lang.AbstractMethodError
    at com.stc.ePM.api.ePM_MessageTrackDetail.(ePM_MessageTrackDetail.java:91)
    at com.stc.ePM.webint.RhMsgDetails.handleRequest(RhMsgDetails.java:99)
    at com.stc.ePM.webint.RequestController.getNextPage(RequestController.java:143)
    at _0002fcontroller_0002ejspcontroller_jsp_5._jspService(_0002fcontroller_0002ejspcontroller_jsp_5.java:88)
    at org.apache.jasper.runtime.HttpJspBase.service(HttpJspBase.java:119)
    at javax.servlet.http.HttpServlet.service(HttpServlet.java:853)
    at org.apache.jasper.servlet.JspServlet$JspServletWrapper.service(JspServlet.java:177)
    at org.apache.jasper.servlet.JspServlet.serviceJspFile(JspServlet.java:318)
    at org.apache.jasper.servlet.JspServlet.service(JspServlet.java:391)
```

Figure 44 Classes12.zip missing from classpath: Logon Error

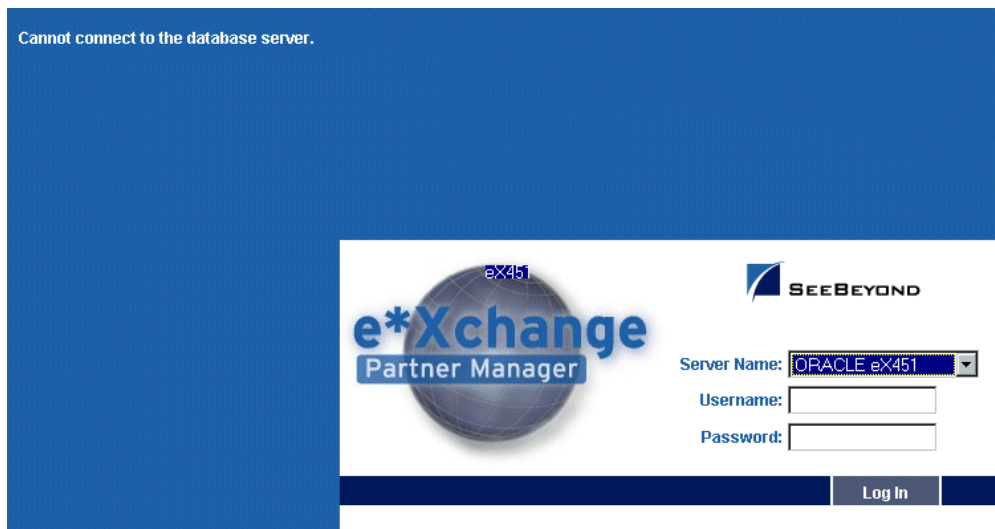
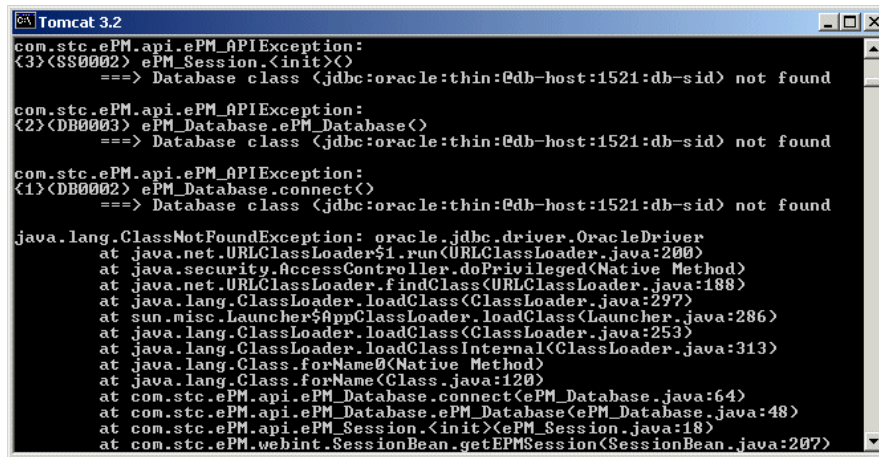


Figure 45 Classes12.zip missing from classpath: Tomcat Error



```

Tomcat 3.2
com.stc.ePM.api.ePM_APIException:
<3><SS0002> ePM_Session.<init><>
====> Database class <jdbc:oracle:thin:@db-host:1521:db-sid> not found

com.stc.ePM.api.ePM_APIException:
<2><DB0003> ePM_Database.ePM_Database<>
====> Database class <jdbc:oracle:thin:@db-host:1521:db-sid> not found

com.stc.ePM.api.ePM_APIException:
<1><DB0002> ePM_Database.connect<>
====> Database class <jdbc:oracle:thin:@db-host:1521:db-sid> not found

java.lang.ClassNotFoundException: oracle.jdbc.driver.OracleDriver
    at java.net.URLClassLoader$1.run(URLClassLoader.java:200)
    at java.security.AccessController.doPrivileged(Native Method)
    at java.net.URLClassLoader.findClass(URLClassLoader.java:188)
    at java.lang.ClassLoader.loadClass(ClassLoader.java:297)
    at sun.misc.Launcher$AppClassLoader.loadClass(Launcher.java:286)
    at java.lang.ClassLoader.loadClass(ClassLoader.java:253)
    at java.lang.ClassLoader.loadClassInternal(ClassLoader.java:313)
    at java.lang.Class.forName0(Native Method)
    at java.lang.Class.forName(Class.java:120)
    at com.stc.ePM.api.ePM_Database.connect(ePM_Database.java:64)
    at com.stc.ePM.api.ePM_Database.ePM_Database(ePM_Database.java:48)
    at com.stc.ePM.api.ePM_Session.<init><>(ePM_Session.java:18)
    at com.stc.ePM.webhint.SessionBean.getSession(SessionBean.java:207)
  
```

Figure 46 Tools.jar Missing from classpath

Error: 500

Location: /stcepmweb/login_form.jsp

Internal Servlet Error:

```

javax.servlet.ServletException: sun/tools/javac/Main
    at org.apache.jasper.servlet.JspServlet.service(JspServlet.java:399)
    at javax.servlet.http.HttpServlet.service(HttpServlet.java:853)
    at org.apache.tomcat.core.ServletWrapper.doService(ServletWrapper.java:404)
    at org.apache.tomcat.core.Handler.service(Handler.java:286)
    at org.apache.tomcat.core.ServletWrapper.service(ServletWrapper.java:372)
    at org.apache.tomcat.core.ContextManager.internalService(ContextManager.java:797)
    at org.apache.tomcat.core.ContextManager.service(ContextManager.java:743)
    at org.apache.tomcat.service.connector.Ajp12ConnectionHandler.processConnection(Ajp12ConnectionHandler.java:166)
    at org.apache.tomcat.service.TcpWorkerThread.runIt(PoolTcpEndpoint.java:416)
    at org.apache.tomcat.util.ThreadPool$ControlRunnable.run(ThreadPool.java:498)
    at java.lang.Thread.run(Unknown Source)
  
```

Root cause:

```

java.lang.NoClassDefFoundError: sun/tools/javac/Main
    at org.apache.jasper.compiler.SunJavaCompiler.compile(SunJavaCompiler.java:128)
    at org.apache.jasper.compiler.Compiler.compile(Compiler.java:245)
    at org.apache.jasper.servlet.JspServlet.doLoadJSP(JspServlet.java:462)
    at org.apache.jasper.servlet.JasperLoader12.loadJSP(JasperLoader12.java:146)
    at org.apache.jasper.servlet.JspServlet.loadJSP(JspServlet.java:433)
    at org.apache.jasper.servlet.JspServlet$JspServletWrapper.loadIfNecessary(JspServlet.java:152)
    at org.apache.jasper.servlet.JspServlet$JspServletWrapper.service(JspServlet.java:164)
    at org.apache.jasper.servlet.JspServlet.serviceJspFile(JspServlet.java:318)
    at org.apache.jasper.servlet.JspServlet.service(JspServlet.java:391)
    at javax.servlet.http.HttpServlet.service(HttpServlet.java:853)
    at org.apache.tomcat.core.ServletWrapper.doService(ServletWrapper.java:404)
    at org.apache.tomcat.core.Handler.service(Handler.java:286)
    at org.apache.tomcat.core.ServletWrapper.service(ServletWrapper.java:372)
    at org.apache.tomcat.core.ContextManager.internalService(ContextManager.java:797)
  
```

Web Interface: Profile Management

The e*Xchange Partner Manager Web interface allows you to set up all the information you need to exchange eBusiness messages with trading partners, via a browser interface.

From the Web interface you can complete the following activities relating to profile management:

- Add, edit, or delete a company
- Add, edit, or delete a trading partner
- Add, edit, or delete an eBusiness protocol
- Add, edit, or delete a message profile
- Set or change security for a company, trading partner, eBusiness protocol, or message profile.

Note: In the Web interface, an asterisk (*) on a field indicates that it is a required field.

This chapter provides information on working with the company, trading partner, and eBusiness protocol levels. The message profile level is addressed separately for each eBusiness protocol in the following chapters:

- X12—[“Web Interface: Profile Setup for X12” on page 100](#)
- UN/EDIFACT—[“Web Interface: Profile Setup for UN/EDIFACT” on page 113](#)
- RosettaNet—[“Web Interface: Profile Setup for RosettaNet” on page 137](#)

For information on setting up security at all levels, refer to [“Web Interface: Security” on page 97](#).

4.1 Profile Management

Profile setup and management is divided into four component levels:

- Company (see [“Setting Up Company Information” on page 73](#))

The company component is the highest level of the trading partner profile. It includes the name of the company and any related information that your business requires you to store about the partner company.

The only information required at the company level is the company name.

- Trading Partner (see [“Setting Up Trading Partner Information” on page 78](#))

Information about your trading partner. This could be a subdivision of a company, it could be the same as the company, or you could set up your various trading partners under a “dummy” umbrella company.

The only information required at the trading partner level is the trading partner name. Security is automatically inherited from the upper (company) level, although you can change it.

- B2B Protocol (see [“Setting Up B2B Protocol Information” on page 83](#))

This level allows you to define eBusiness protocol values that are unique to the trading partner but independent of the message being sent or received. This includes items such as the communications protocol to be used, encryption information (if applicable), and SSL information (if you are using HTTPS).

For each trading partner, you would define one inbound B2B protocol and one outbound, for each message standard version.

B2B protocol attributes are grouped into three sections:

- ♦ General
- ♦ Transport Component
- ♦ Message Security

- Message Profile (see [“Setting Up Message Profile Information” on page 96](#))

This level, the final step in trading partner setup, allows you to define the values required so that you can successfully send and receive specific eBusiness protocol messages. This includes items such as the Global Process Code and the Global Partner Role Classification Code (for RosettaNet), the Transaction Set ID and Functional ID Code (for X12), and the Message Type Identifier (for UN/EDIFACT).

Define one message profile for each message you will send to the trading partner and one for each message you will receive from the trading partner.

4.1.1 Supported Communications Protocols

The communications protocols supported by the e*Xchange Partner Web interface for version 4.5.1 are shown in Table 18.

Table 18 Supported Communications Protocols

eBusiness Protocol	FTP (Batch)	HTTP	HTTPS	SMTP
RosettaNet 1.1	No	Yes	Yes	No
RosettaNet 2.0	No	Yes	Yes	Yes
UN/EDIFACT	Yes	Yes	Yes	Yes
X12	Yes	Yes	Yes	Yes

4.2 Setting Up Company Information

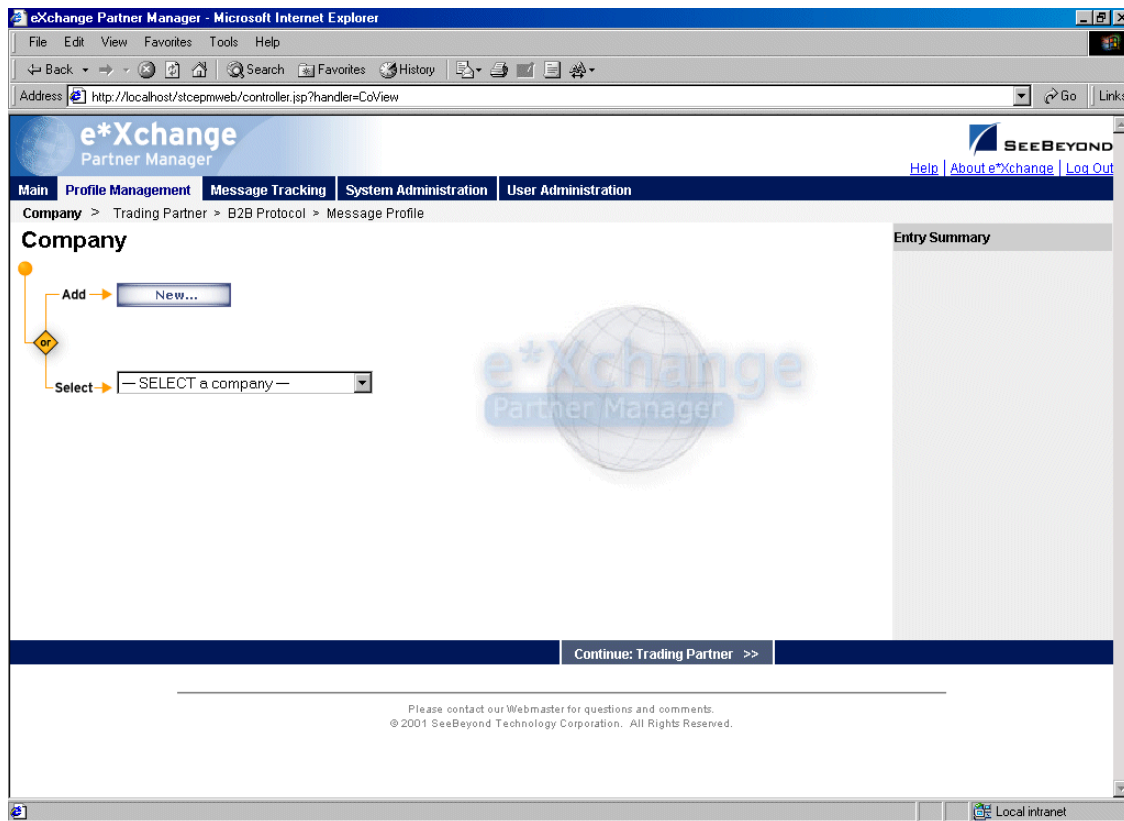
The Company List is the starting point for all the profile management functions provided by the Web interface.

To access the Company List

- From the Main page, click **Profile Management**.

The **Company** page appears (see Figure 47).

Figure 47 Company Page



From the **Company** page you can complete the following activities:

- Add a company (see ["To add a company" on page 74](#))
- Select a company: choose from the drop-down list. The company properties are displayed on the right side of the page.
- Edit the selected company (see ["To edit a company" on page 75](#))
- Create a new company based on the selected one (see ["To copy a company" on page 76](#))
- Delete the selected company (see ["To delete a company" on page 77](#))
- Set or change security for the selected company (see ["Web Interface: Security" on page 97](#))

- Go on to trading partner activities: select a company and then click **Continue: Trading Partner** to access the **Trading Partner** page.

To add a company

- From the **Company** page, click the **New** button to access the **Company - adding** page (see Figure 48).
- Enter the company information.
For more information, refer to Table 19.
- Click **Continue** to save the new information and return to the **Company** page.
The new company information is now displayed, as shown in Figure 49.

Note: Company profiles are only available if they were already set up in e*Xchange Client for Windows. If you select a company profile, more attributes might be available than are shown in Figure 48).

Figure 48 Company - adding

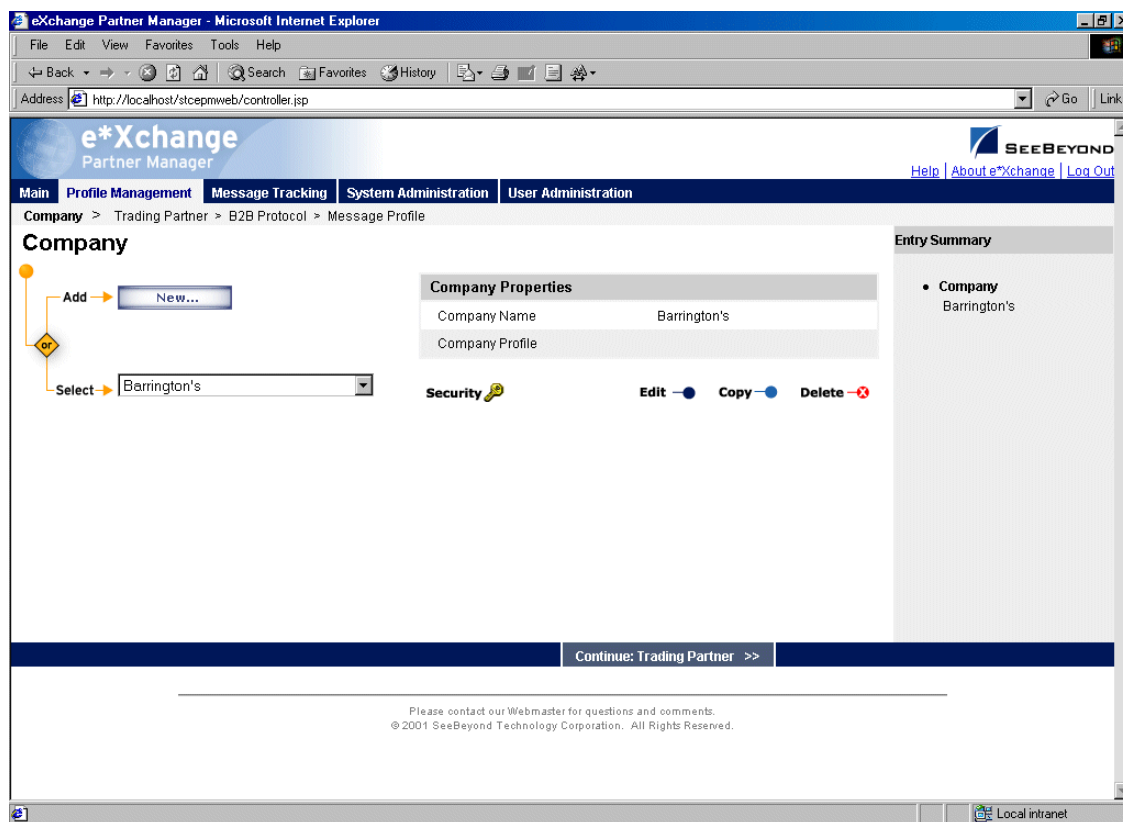
Table 19 Company - Adding, Editing, Copying: Fields

Name	Description
Company Name	The name of the company.
Company Profile	Not yet supported in the Web interface.

Table 19 Company - Adding, Editing, Copying: Fields (Continued)

Name	Description
Go Back	Click Go Back to return to the Company page.
Continue	When you have entered the values, click Continue to add the new company and return to the Company page.

Figure 49 Company Page Showing Company Information



To edit a company

- 1 From the **Company** page, select the company from the drop-down list.
- 2 Click the **Edit** button to access the **Company - editing** page (see Figure 50).

Figure 50 Company - editing

e*Exchange Partner Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://localhost/stcepmweb/controller.jsp

e*Exchange Partner Manager

SEE BEYOND

Help | About e*Exchange | Log Out

Main Profile Management Message Tracking System Administration User Administration

Company > Trading Partner > B2B Protocol > Message Profile

Company - editing

Edit Company

ATTRIBUTES	VALUES
Company Name	Barrington's
Company Profile	

Cancel Continue

Entry Summary

- Company
Barrington's

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Done Local intranet

3 Change the values as needed.

For more information, refer to [Table 19 on page 74](#).

4 Click **Continue** to return to the **Company** page.

To copy a company

1 On the **Company** page, select the company that you want to copy.

2 Click the **Copy** button.

The **Company - copying** page appears (see Figure 51).

Figure 51 Company - copying

- 3 Change the company name, and any other values as needed.

For more information, refer to [Table 19 on page 74](#).

- 4 Click **Continue**.

You are returned to the **Company List** page. The new company is now on the drop-down company list.

To delete a company

- 1 On the **Company** page, select the company from the drop-down list.

- 2 Click the **Delete** button.

A warning message appears asking if you are sure you want to delete.

- 3 To delete the profile, click **OK**.

The company is deleted.

To set up security

- From the **Company** page, click the **Security** button to access the **Security Management** page.

The **Security Management** page appears.

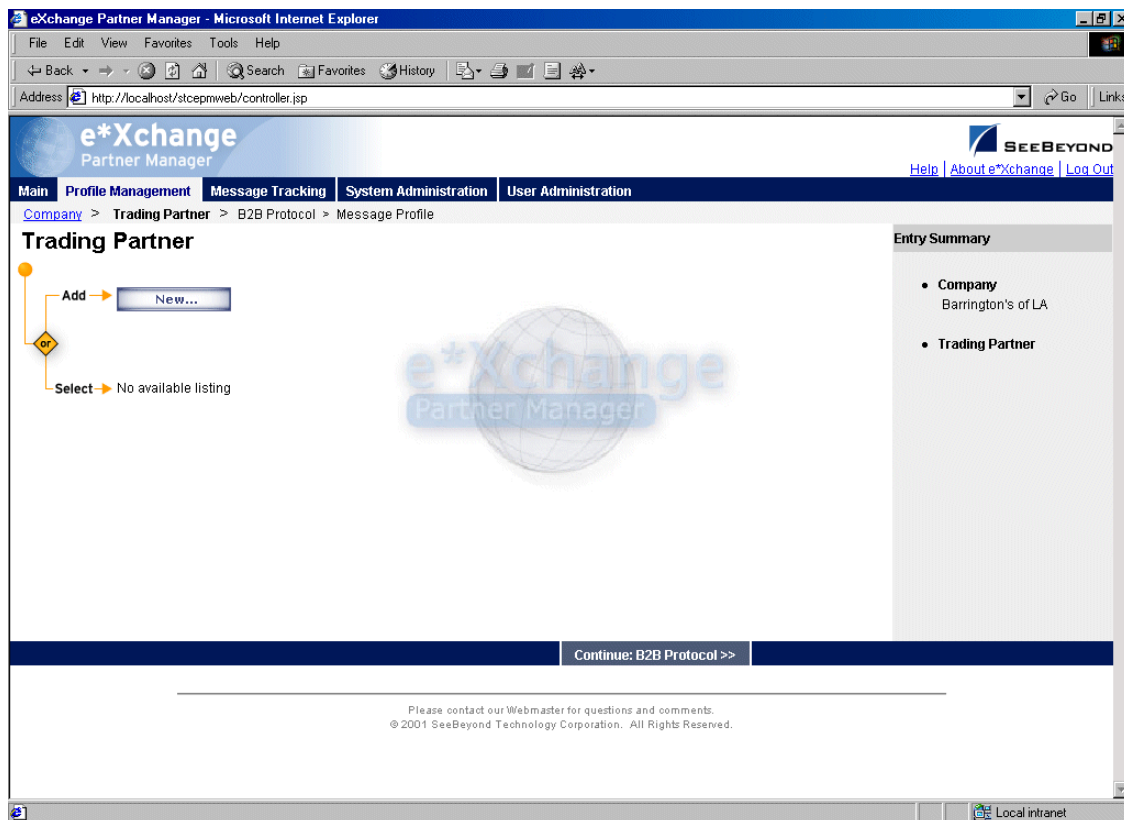
For detailed instructions on setting up security, refer to [“Web Interface: Security” on page 97](#).

4.3 Setting Up Trading Partner Information

Once you have set up a company, the next step is to set up trading partners for that company. For example, if you do business with several divisions of the same company, you can set up each one as a separate trading partner.

From the **Company** page, select a company and click **Continue: Trading Partner** to access the **Trading Partner** page (see Figure 52).

Figure 52 Trading Partner Page



From the **Trading Partner** page you can complete the following activities:

- Add a trading partner for the selected company (see [“To add a trading partner” on page 79](#))
- Select a trading partner: choose from the drop-down list. The trading partner properties are displayed on the right side of the page.
- Edit the selected trading partner profile (see [“To edit a trading partner” on page 80](#))
- Create a new trading partner profile based on the selected one (see [“To copy a trading partner” on page 81](#))
- Delete the selected trading partner profile (see [“To delete a trading partner” on page 82](#))

- Activate or deactivate the selected trading partner profile (see [“To deactivate \(or reactivate\) a trading partner” on page 82](#))
- Set or change security for the selected trading partner profile (see [“Web Interface: Security” on page 97](#))
- Go on to B2B protocol activities: select a trading partner and then click **Continue: B2B Protocol** to access the **B2B Protocol** page.

To add a trading partner

- 1 From the **Trading Partner** page, click **New** to access the **Trading Partner - adding** page (see Figure 53).
- 2 Enter or select values for the trading partner.
For more information, see Table 20.
- 3 Click **Continue** to save the new information and return to the **Trading Partner** page.

The new trading partner information is now displayed, as shown in Figure 54.

Note: Trading partner profiles are only available if they were already set up in e*Xchange Client for Windows. If you select a trading partner profile, there might be more attributes available than in the example shown in Figure 53).

Figure 53 Trading Partner - adding

e*Xchange Partner Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://localhost/stcepmweb/controller.jsp Go Links

e*Xchange Partner Manager **SEEBEYOND** Help About e*Xchange Log Out

Main Profile Management Message Tracking System Administration User Administration

Company > Trading Partner > B2B Protocol > Message Profile

Trading Partner - adding

Add Trading Partner

ATTRIBUTES	VALUES
Trading Partner Name *	
Trading Partner Profile	
Alternative ID	
Trading Partner Status *	Active

Cancel Continue

Entry Summary

- Company
Barrington's
- Trading Partner

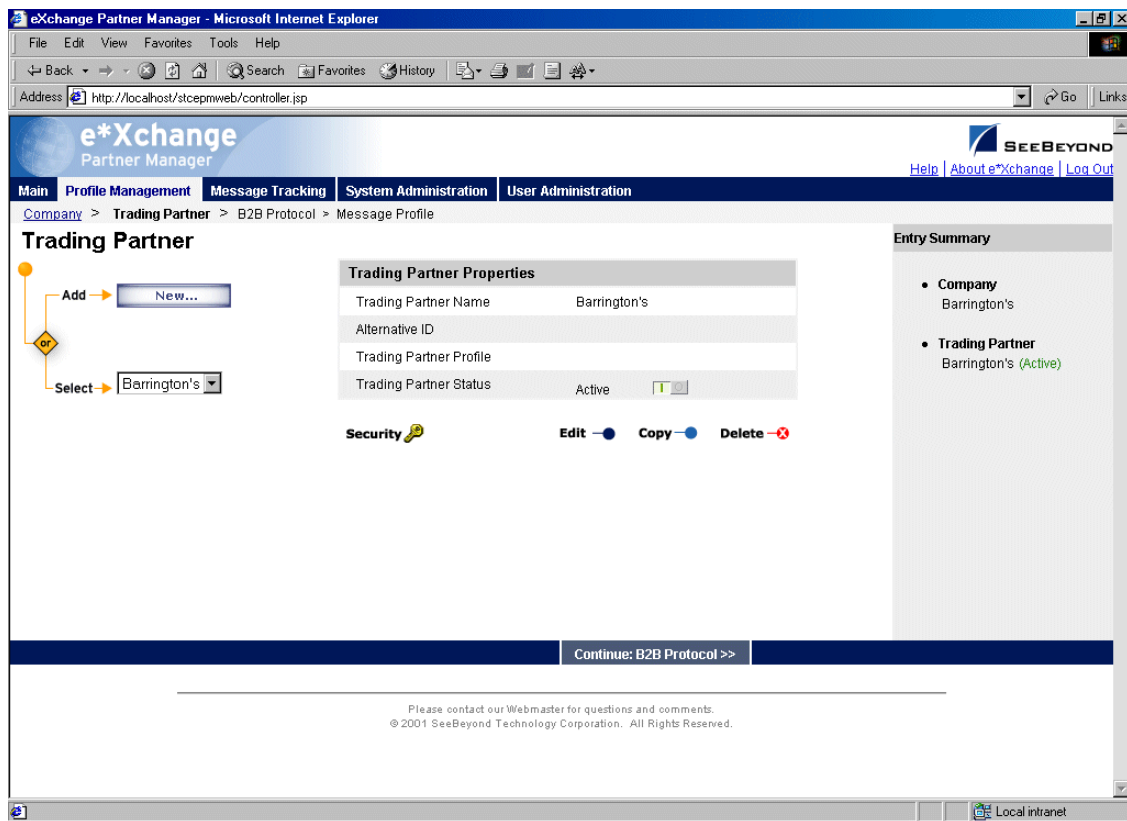
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Done Local intranet

Table 20 Trading Partner - Adding, Editing, Copying: Fields

Name	Description
Trading Partner Name	The name of the trading partner.
Trading Partner Profile	Not yet supported in the Web interface.
Alternative ID	An optional alternative ID. This is not currently used.
Trading Partner Status	The status of the trading partner: Active or Inactive . Default: Active .

Figure 54 Trading Partner Page Showing Trading Partner Information



To edit a trading partner

- 1 From the **Trading Partner** page, select the trading partner from the drop-down list.
- 2 Click the **Edit** button to access the **Trading Partner - editing** page (see Figure 55).

Figure 55 Trading Partner - editing

e*Exchange Partner Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://localhost/stcepmweb/controller.jsp Go Links

e*Exchange Partner Manager

SEEBEYOND

Help | About e*Exchange | Log Out

Main Profile Management Message Tracking System Administration User Administration

Company > Trading Partner > B2B Protocol > Message Profile

Trading Partner - editing

Edit Trading Partner

ATTRIBUTES	VALUES
Trading Partner Name	Barrington's
Alternative ID	
Trading Partner Profile	
Trading Partner Status	* Active

Cancel Continue

Entry Summary

- Company
Barrington's
- Trading Partner
Barrington's (Active)

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Done Local intranet

3 Edit the trading partner properties as needed.

For more information, see [Table 20 on page 80](#).

4 Click **Continue** to return to the **Trading Partner** page.

To copy a trading partner

1 On the **Trading Partner** page, select the trading partner that you want to copy.

2 Click the **Copy** button.

The **Trading Partner - copying** page appears (see Figure 56).

Figure 56 Trading Partner - copying

e*Exchange Partner Manager

Company > Trading Partner > B2B Protocol > Message Profile

Trading Partner - copying

Copy Trading Partner

ATTRIBUTES	VALUES
Trading Partner Name *	Barrington's
Alternative ID	
Trading Partner Profile	
Trading Partner Status *	Active

Cancel Continue

Entry Summary

- Company
Barrington's
- Trading Partner
Barrington's (Active)

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- 3 Change the values as needed.

For more information, see [Table 20 on page 80](#).

- 4 Click **Continue** to return to the **Trading Partner** page.

The new trading partner is now on the drop-down trading partner list.

To delete a trading partner

- 1 On the **Trading Partner** page, select the trading partner from the drop-down list.
- 2 Click the **Delete** button.


A warning message appears asking if you are sure you want to delete.

- 3 To delete the profile, click **OK**.


The trading partner is deleted.

To deactivate (or reactivate) a trading partner

- 1 On the **Trading Partner** page, select the trading partner from the drop-down list.
The trading partner properties are displayed on the right side of the page.
- 2 In the **Trading Partner Status** field, toggle the Active/Inactive graphic to change the status. Values are as follows:

- ♦  Trading partner is active: click to deactivate

Note: *If you attempt to deactivate a trading partner when there are active messages (either in the queue or waiting for acknowledgment) for the trading partner, e*Xchange gives a warning that the messages will be deleted if you continue.*

- ♦  Trading partner is inactive: click to reactivate. You are offered the option to cascade the current access rights to the lower levels.

To set up security

- On the **Trading Partner** page, click the **Security** button to access the **Security Management** page.

The **Security Management** page appears.

For detailed instructions on setting up security, refer to [“Web Interface: Security” on page 97](#).

4.4 Setting Up B2B Protocol Information

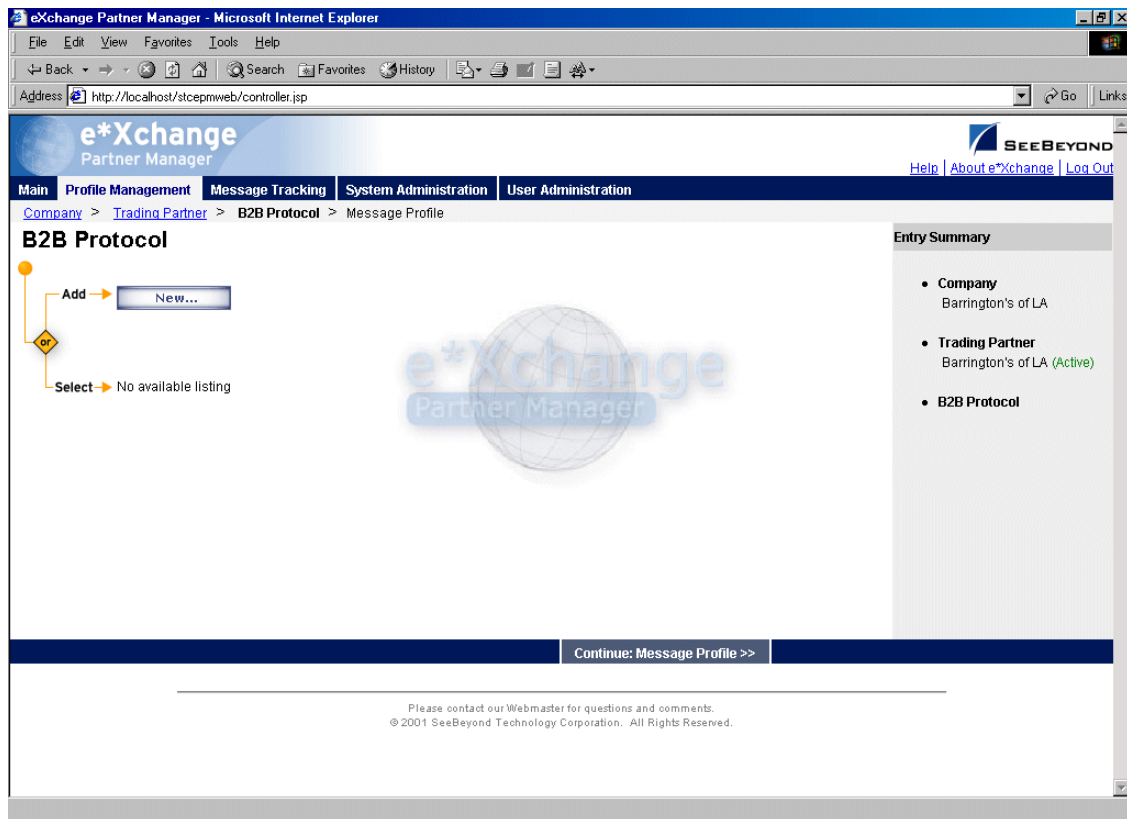
Once you have set up a trading partner, the next step is to enter B2B protocol information for that trading partner. For each ebusiness protocol, you must set up the outbound and inbound values separately.

The B2B protocol attributes that you must enter are grouped into three sections:

- General
- Transport Component
- Message Security

From the **Trading Partner** page, select a trading partner and click **Continue: B2B Protocol** to access the **B2B Protocol** page (see Figure 57).

Figure 57 B2B Protocol Page



From the **B2B Protocol** page you can complete the following activities:

- Add a B2B protocol for the selected trading partner (see [“To add a B2B protocol” on page 85](#))
- Select a B2B protocol: choose from the drop-down list. The B2B protocol **General** properties are displayed on the right side of the page. Click on the **Transport Component** or **Message Security** links above the properties display to view those additional properties.
- Edit the selected B2B protocol; first select the section that you want to edit (General, Transport Component, or Message Security), and then click the **Edit** button to access the **B2B Protocol - editing** page (see [“To edit a B2B protocol” on page 92](#))
- Create a new B2B protocol based on the selected one (see [“To copy a B2B protocol” on page 93](#))
- Delete the selected B2B protocol (see [“To delete a B2B protocol for a trading partner” on page 95](#))
- Activate or deactivate the selected B2B protocol (see [“To deactivate \(or reactivate\) a B2B protocol” on page 96](#))
- Set or change security for the B2B protocol (see [“Web Interface: Security” on page 97](#))

- Select an existing B2B protocol and click **Continue: Message Profile** to access the **Message Profile** page.

To add a B2B protocol

- 1 From the **B2B Protocol** page, click the **New** button to access the **B2B Protocol - adding** page. (see Figure 58).

Figure 58 B2B Protocol - adding

ATTRIBUTES	VALUES
eBusiness Protocol	X12
Version	2001
Direction	Inbound

Cancel Continue

Entry Summary

- Company
Barrington's
- Trading Partner
Barrington's (Active)
- B2B Protocol

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- 2 Select an ebusiness protocol, version, and direction, and then click **Continue** to access the next **B2B Protocol - adding** page, General section (see Figure 59).

Note: The specific fields might vary according to the B2B protocol you have selected.

Figure 59 B2B Protocol - adding (General section)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page has a navigation bar with tabs: Main, Profile Management, Message Tracking, System Administration, and User Administration. Below the navigation bar, the breadcrumb trail is: Company > Trading Partner > B2B Protocol > Message Profile. The main heading is "B2B Protocol - adding".

The "General" section contains the following form fields:

eBusiness Profile Name	X12-4020-Outbound
eBusiness Protocol Type	X12
eBusiness Protocol Version	4020
Direction	Outbound
Positive TA1 Acknowledgement *	N
Logical Name	
Status *	Active
Communication Protocol	FTP (Batch)

Below the form are "Cancel" and "Continue" buttons.

On the right side, there is an "Entry Summary" section with a list of items:

- **Company**
Barrington's of LA
- **Trading Partner**
Barrington's of LA (Active)
- **B2B Protocol**

At the bottom of the page, there is a footer with the text: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved."

- 3 Enter the values for the **General** attributes.
For more information, see [Table 21 on page 89](#).
- 4 Click **Continue** to access the **Transport Component** section (see Figure 60).

Figure 60 B2B Protocol - adding (Transport Component section)

The screenshot displays the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser's address bar shows the URL `http://localhost/stcepmweb/controller.jsp`. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "B2B Protocol - adding".

The "Transport Component" section contains the following form fields:

Transport Component	
Communication Protocol	HTTPS
URL	<input type="text"/>
User Name	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>

Below the form are three buttons: "Cancel", "Go Back", and "Continue".

On the right side, the "Entry Summary" section lists the following items:

- Company
Barrington's
- Trading Partner
Barrington's (Active)
- B2B Protocol

The footer of the page contains the text: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved."

- 5 Enter the values for the **Transport Component** attributes.
For more information, see [Table 22 on page 90](#).
- 6 Click **Continue** to access the **Message Security** section (see Figure 61).

Figure 61 B2B Protocol - adding (Message Security section)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "B2B Protocol - adding".

The "Message Security" section contains the following fields:

Encryption Certificate Name	<input type="text"/>	Eff Date (mm/dd/yyyy)	10/12/2001	End Date (mm/dd/yyyy)	<input type="text"/>
Encryption Algorithm	<input type="text"/>	Encryption Certificate Name Key Content	<input type="button" value="Load File"/>		
Signature Key Name	<input type="text"/>	Eff Date (mm/dd/yyyy)	10/12/2001	End Date (mm/dd/yyyy)	<input type="text"/>
Signature Key Password	<input type="text"/>	Confirm Password	<input type="text"/>		
Signature Algorithm	<input type="text"/>	Signature Key Name Key Content	<input type="button" value="Load File"/>		
SSL Keystore Value	<input type="text"/>	Eff Date (mm/dd/yyyy)	10/12/2001	End Date (mm/dd/yyyy)	<input type="text"/>
SSL Keystore Password	<input type="text"/>	Confirm Password	<input type="text"/>		
SSL Keystore Type	<input type="text"/>	SSL Keystore Value Key Content	<input type="button" value="Load File"/>		

At the bottom of the form are three buttons: "Cancel", "Go Back", and "Finish".

On the right side, the "Entry Summary" section lists the following items:

- Company
Barrington's
- Trading Partner
Barrington's (Active)
- B2B Protocol

Note: The values you chose for Communications Protocol and Direction determine the selection of fields available on the Message Security page. Figure 61 is only an example.

- 7 Enter the values for the **Message Security** attributes.
For more information, refer to [Table 23 on page 91](#) for outbound messages, or [Table 24 on page 92](#) for inbound messages.
- 8 Click **Finish** to save the information and return to the **B2B Protocol** page.

Table 21 B2B Protocol, General Section

Name	Description
eBusiness Profile Name	The name of the profile. This is automatically created out of the selected eBusiness protocol, version, and direction you chose on the New B2B Protocol page; for example, X12-4010-Inbound. However, you can change it.
eBusiness Protocol Type	An indication of the selected eBusiness protocol; ROS (for RosettaNet), X12, or EDF for UN/EDIFACT.
eBusiness Protocol Version	The version of the eBusiness protocol, as selected on the New B2B Protocol page.
Direction	The direction for the messages you are currently setting up; I for Inbound or O for Outbound.
Positive TA1 Acknowledgment (X12 only)	Indicates whether a positive TA1 is to be transmitted to the trading partner (for inbound) or received from the trading partner (for outbound); Y or N .
Logical Name	<p>A unique value that you specify for the trading partner. There are several important conditions for the logical name:</p> <ul style="list-style-type: none"> For X12 and UN/EDIFACT, the Logical Name, Version, Sender ID, and Receiver ID for the outbound outer envelope must match the Logical Name, Version, Receiver ID, and Sender ID for the inbound outer envelope. For example, if you are using X12 version 4020, use the same logical name value for the inbound and outbound envelopes for that version. It must be unique for each inbound/outbound envelope set. For example, if you are using X12 versions 4020 and 4030, use one value for the 4020 inbound and outbound envelope set, and another for the 4030 inbound and outbound envelopes. If you have only one outer envelope set per company, you can use the company name. You could also use a numerical value, or any other value as long as it is unique to the inbound/outbound envelope set. For outbound messages, this is the primary value used when e*Xchange receives a message from an internal system to identify the trading partner to which the message is routed. The value in this field must be identical, including case, to the value set the eX_Standard_Event structure's Partner Name node. For more information, refer to the <i>e*Xchange Partner Manager Implementation Guide</i>.
Status	Select a status for the B2B protocol; Active or Inactive . Default: Active .
Communication Protocol	The communications protocol to be used for sending or receiving messages using this B2B protocol; FTP (Batch), HTTP, HTTPS, or SMTP.
Internal Format (RosettaNet 2.0 only)	<p>A code used only for messages that will be sent to or received from the internal system, not to the trading partner. The internal format code indicates the message format. Acceptable values:</p> <ul style="list-style-type: none"> GEN for a message in RosettaNet 2.0 generic format (the default). RNBM for a message in RosettaNet 2.0 Business Message format.

Table 22 B2B Protocol, Transport Component Section

Name	Description
Communication Protocol	<p>The communications protocol used for this B2B protocol component.</p> <ul style="list-style-type: none"> FTP (Batch)—Messages are transmitted using the FTP protocol. Note: If you want the files to be stored on the local machine, supply the File Name but leave the User Name, Password, Host, and Port boxes empty. HTTP—Messages are transmitted with HTTP. HTTPS—Messages are transmitted using HTTP with SSL. SMTP—Messages are transmitted using the Simple Mail Transfer Protocol.
File Name (FTP)	<p>For inbound—type the complete file name, including path and extension, of the file from which inbound outer envelopes based on this profile are read, or to which outbound outer envelopes are written. You can use wild cards in the filename or at the beginning of the extension but not at the end; for example, use *.dat or *.at but not *.da*.</p> <p>For outbound—type the complete file name, including path and extension, using variables as needed. %d adds a two-digit day (for example, 05 for the fifth day of the month) to the file name, and %# adds a sequential number (for example, 01, 02, and so forth); for example, TP01%d_%#.dat.</p> <p>Windows: If the FTP server is set up on a Windows machine, the path must be relative to the FTP server default directory. For example, if the FTP server default directory is c:\eGate and your full path for inbound messages is c:\eGate\X12\input*.in, type only \X12\input.*in.</p> <p>UNIX: If the FTP server is set up on a UNIX machine, use forward slashes. For example, your full path for outbound messages might be /home/eGate/EFT/output/1400_EDF48_%d_%#.dat.</p>
URL (HTTP, HTTPS)	<p>If comm protocol is HTTP or HTTPS, enter the full URL, including prefix. For example: http://www.WebAddress.com or https://www.SecureWebAddress.com.</p>
User Name (FTP, HTTP, HTTPS)	<p>The user name to be used to access the host on which messages are stored. If the comm protocol is FTP (Batch), this is required for successful transfer of files to and from the FTP server.</p> <p>Note: If you want to store the files on the local machine, leave empty.</p>
Password (FTP, HTTP, HTTPS)	<p>The password to be used to access the host used for storage and retrieval of messages.</p> <p>If comm protocol is FTP (Batch)-this is required for successful transfer of files to or from the host. If files are stored locally, leave empty.</p>
Confirm Password (FTP, HTTP, HTTPS)	<p>Type the password again. This helps prevent errors in entering a password.</p>
Host Name (FTP)	<p>The name of the host on which messages are stored. For inbound messages, this is the source of the messages; for outbound messages, it is the destination.</p> <p>If comm protocol is FTP (Batch)- this is required for successful transfer of files to or from the host. If files are stored locally, leave empty.</p>
Port Number (FTP)	<p>If desired, you can specify the port to be used to access the host. Leave blank to use the default port.</p>
Sender e-Mail Address (SMTP)	<p>The e-mail address of the message sender.</p>

Table 22 B2B Protocol, Transport Component Section (Continued)

Name	Description
Receiver e-mail (SMTP)	The e-mail address of the message recipient.
MailHost/IP Address (SMTP) (Outbound only)	The host name of the mail server.
MailHost Port (SMTP) (Outbound only)	The port for the mail server.

Table 23 B2B Protocol, Message Security Section (Outbound)

Name	Description
Encryption Certificate Name	The name for your encryption certificate.
Eff Date/End Date	Set the effective date and expiration date for the encryption certificate.
Encryption Algorithm	The algorithm used for the message security. Choose DES_CBC, RC2_128, RC2_40, or DES_EDE3_CBC.
Encryption Certificate Name Key Content	To load the key content into the database, click the Load File button to access the File Upload page. Browse for the file, and then click the Upload button. When upload is complete, click OK .
Signature Key Name	The name for your signature key.
Eff Date/End Date	Set the effective date and expiration date for the signature key.
Signature Key Password (Optional)	Type the password for the signature key, if it has one.
Confirm Password	Type the signature key password again, to confirm it.
Signature Algorithm	The algorithm used for the signature encryption. Choose RSA_MD5 or RSA_SHA1.
Signature Key Name Key Content	To load the key content into the database, click the Load File button to access the File Upload page. Browse for the file, and then click the Upload button. When upload is complete, click OK .
SSL Keystore Value	The value for the SSL keystore file, used for authentication using SSL. Note: If you set SSL keystores in the Web interface, do not make later changes to the trading partner profile in e*Xchange Client for Windows. Since e*Xchange Client for Windows does not support the setup of SSL keystores, changing the information in e*Xchange Client for Windows after the keystore has been set up might cause problems.
Eff Date/End Date	Set the effective date and expiration date for the SSL keystore.
SSL Keystore Password	Type the password for the SSL keystore, if any.
Confirm Password	Type the SSL keystore password again, to confirm it.
SSL Keystore Type	The type of keystore: JKCS or PKCS12.

Table 23 B2B Protocol, Message Security Section (Outbound) (Continued)

Name	Description
SSL Keystore Value Key Content	To load the key content into the database, click the Load File button to access the File Upload page. Browse for the file, and then click the Upload button. When upload is complete, click OK .

Table 24 B2B Protocol, Message Security Section (Inbound)

Name	Description
Decryption Key Name	The name for the decryption key.
Eff Date/End Date	Set the effective date and expiration date for the decryption key.
Decryption Key Password	The password for the decryption key.
Confirm Password	Type the decryption key password again, to confirm it.
Decryption Key Name Key Content	To load the key content into the database, click the Load File button to access the File Upload page. Browse for the file, and then click the Upload button. When upload is complete, click OK .
Signature Verification Certificate	The name for your signature verification certificate.
Eff Date/End Date	Set the effective date and expiration date for the signature verification certificate.
Signature Verification Certificate Name Key Content	To load the key content into the database, click the Load File button to access the File Upload page. Browse for the file, and then click the Upload button. When upload is complete, click OK .

To edit a B2B protocol

- 1 From the **B2B Protocol** page, select the B2B protocol from the drop-down list.
- 2 Click the link for the section you want to edit: **General**, **Transport Component**, or **Message Security**.
- 3 Click the **Edit** button to access the **B2B Protocol - editing** page listing the attribute section that you selected (see Figure 62).

Figure 62 B2B Protocol - editing (General page)

e*Exchange Partner Manager

File Edit View Favorites Tools Help

Address http://localhost/stcepmweb/controller.jsp

e*Exchange Partner Manager **SEEBEYOND**

Help | About e*Exchange | Log Out

Main | **Profile Management** | Message Tracking | System Administration | User Administration

Company > Trading Partner > B2B Protocol > Message Profile

B2B Protocol - editing

General	
eBusiness Profile Name	X12-4020-Outbound
eBusiness Protocol Type	X12
eBusiness Protocol Version	4020
Direction	Outbound
Positive TA1 Acknowledgement *	N
Logical Name	
Status *	Active
Communication Protocol	FTP (Batch)

Cancel Apply

Entry Summary

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
X12-4020-Outbound (Active)

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Done Local intranet

4 Change the values as needed.

For more information on specific values, refer to the appropriate table:

- ♦ General—[Table 21 on page 89](#)
- ♦ Transport Component—[Table 22 on page 90](#)
- ♦ Message Security (outbound)—[Table 23 on page 91](#)
- ♦ Message Security (inbound)—[Table 24 on page 92](#)

5 Click **Apply** to save the changes and return to the **B2B Protocol** page.

To copy a B2B protocol

- 1 On the **B2B Protocol** page, select the B2B protocol that you want to copy from the drop-down list.
- 2 Click the **Copy** button.

The **B2B Protocol - copying** page appears (see Figure 63).

Figure 63 B2B Protocol - copying

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows http://localhost/stcepmweb/bp_copy_setup.jsp. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "B2B Protocol - copying". Below this is a sub-heading "Copy B2B Protocol". A table with two columns, "ATTRIBUTES" and "VALUES", contains the following data:

ATTRIBUTES	VALUES
eBusiness Protocol	X12
Version	4030
Direction	Inbound

Below the table are "Cancel" and "Continue" buttons. On the right side, there is an "Entry Summary" section with the following details:

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
X12-4030-Outbound (Active)

At the bottom of the page, there is a footer with the text: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved." The browser status bar shows http://localhost/stcepmweb/user_admin_menu.jsp and "Local intranet".

Note: The Web interface automatically changes the direction.

- 3 Click **Continue** to access the **B2B Protocol - copying** page showing the **General** section (see Figure 64).

Figure 64 B2B Protocol - copying (General page)

- 4 Change the values for the **General** attributes as needed.
For more information, see [Table 21 on page 89](#).
- 5 Click **Continue**.
- 6 Change the values for the **Transport Component** attributes as needed.
For more information, see [Table 22 on page 90](#).
- 7 Click **Continue**.
- 8 Change the values for the **Message Security** attributes as needed.
For more information, refer to [Table 23 on page 91](#) for outbound messages, or [Table 24 on page 92](#) for inbound messages.
- 9 Click **Finish** to save the new B2B protocol and return to the **B2B Protocol** page.

To delete a B2B protocol for a trading partner



- 1 On the **B2B Protocol** page, select the B2B protocol from the drop-down list.
- 2 Click the **Delete** button.
A warning message appears asking if you are sure you want to delete.
- 3 To delete the protocol, click **OK**.
The B2B protocol is deleted.

To deactivate (or reactivate) a B2B protocol

- 1 On the **B2B Protocol** page, select the B2B protocol from the drop-down list.

The B2B protocol properties are displayed on the right side of the page.

- 2 In the **B2B Protocol Status** field, toggle the Active/Inactive graphic to change the status. Values are as follows:

- ♦  B2B protocol is active: click to deactivate
- ♦  B2B protocol is inactive: click to reactivate. You are offered the option to cascade the current access rights to the lower levels.

4.5 Setting Up Message Profile Information

The next step is to set up values for individual messages, at the message profile level.

Since the values are considerably different for each eBusiness protocol, message profile setup is addressed in separate chapters, as follows:

X12—[“Web Interface: Profile Setup for X12” on page 100](#)

RosettaNet (versions 1.1 and 2.0)—[“Web Interface: Profile Setup for RosettaNet” on page 137](#)

UN/EDIFACT (versions 3 Batch, 4 Batch, and 4 Interactive)—[“Web Interface: Profile Setup for RosettaNet” on page 137](#)[“Web Interface: Profile Setup for UN/EDIFACT” on page 113](#)

Web Interface: Security

This chapter provides information on using the user security features in the e*Xchange Partner Manager Web interface.

Setup of users and groups is covered in [“Web Interface: Overview and Administration” on page 40](#).

The user security feature for the e*Xchange Partner Manager Web interface works the same at all four levels:

- Company
- Trading Partner
- B2B Protocol
- Message Profile

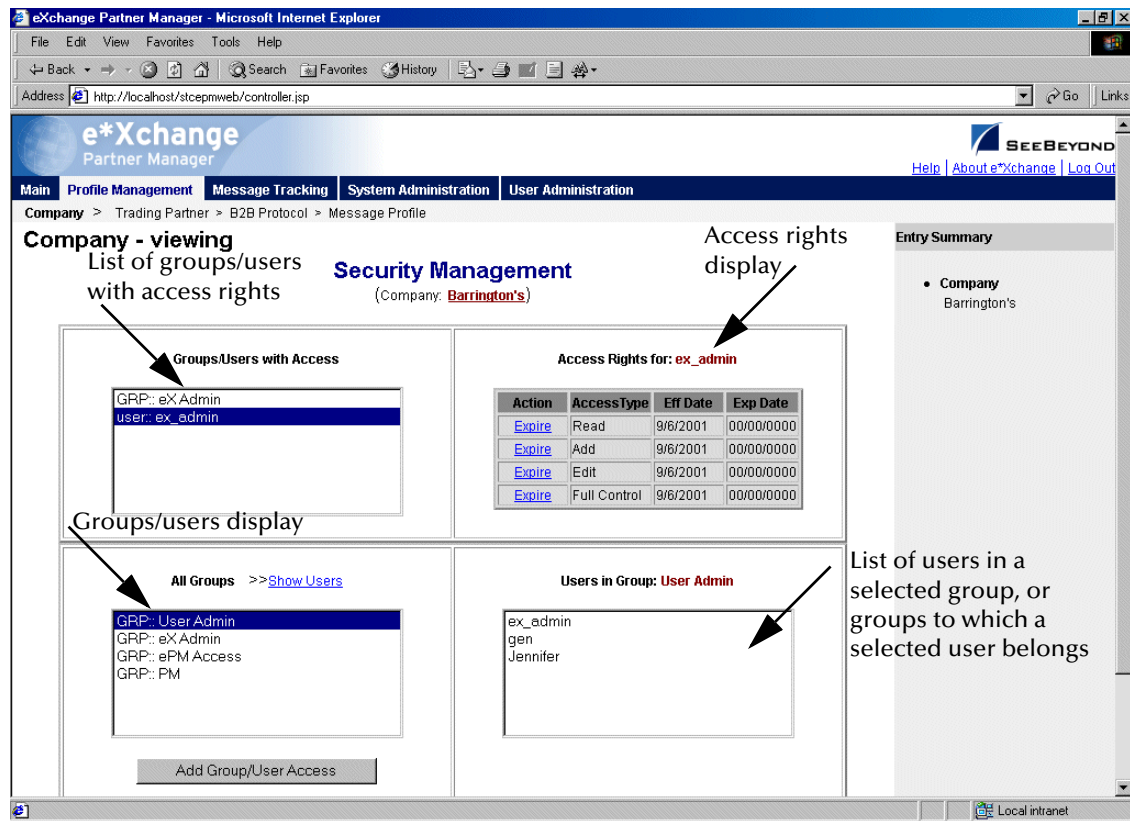
From the **Security Management** page, you can do the following:

- Add group or user access
- Specify customized access rights for a user or group including:
 - ♦ Add access
 - ♦ Expire access
 - ♦ Reinstate access that has been expired

To set up security

- 1 From the main page for any level, click the **Security** button to access the **Security Management** page (see Figure 65).

Figure 65 Security Management Page



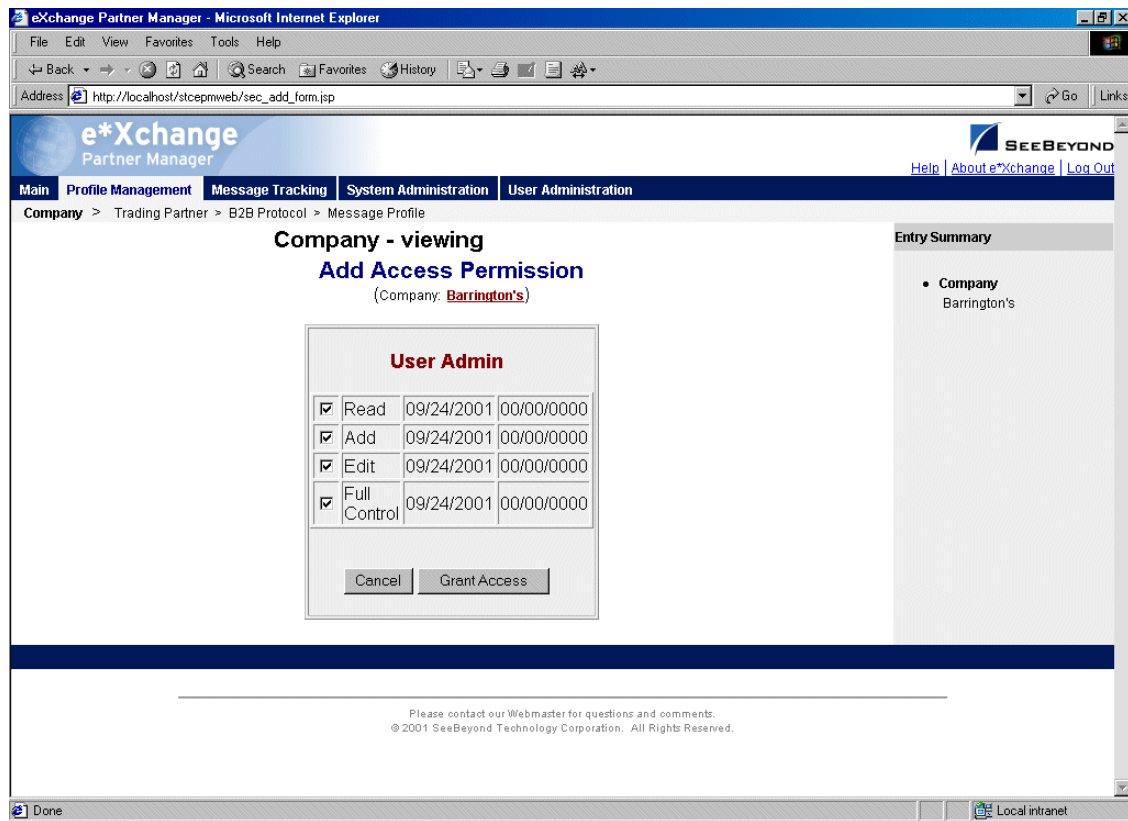
- 2 Set the security values appropriately.
- 3 If needed, set access permissions for a specific group or user by following the procedure provided in ["To add access permission" on page 98](#).
- 4 When done, click the **Done** button, or click the component name at the top of the page, to return to the **Properties** page for the component level.

Note: To show users as well as groups, click the **Show Users** button.

To add access permission

- 1 From the **Security Management** page, click the **Add Group/User Access** button to access the **Add Access Permission** page (see Figure 66).

Figure 66 Add Access Permission Page



- 2 Set the values as needed.
- 3 Click the **Grant Access** button to save the changes and return to the **Security Management** page.

Web Interface: Profile Setup for X12

This chapter provides information on setting up X12 transactions in the e*Xchange Partner Manager, at the Message Profile level.

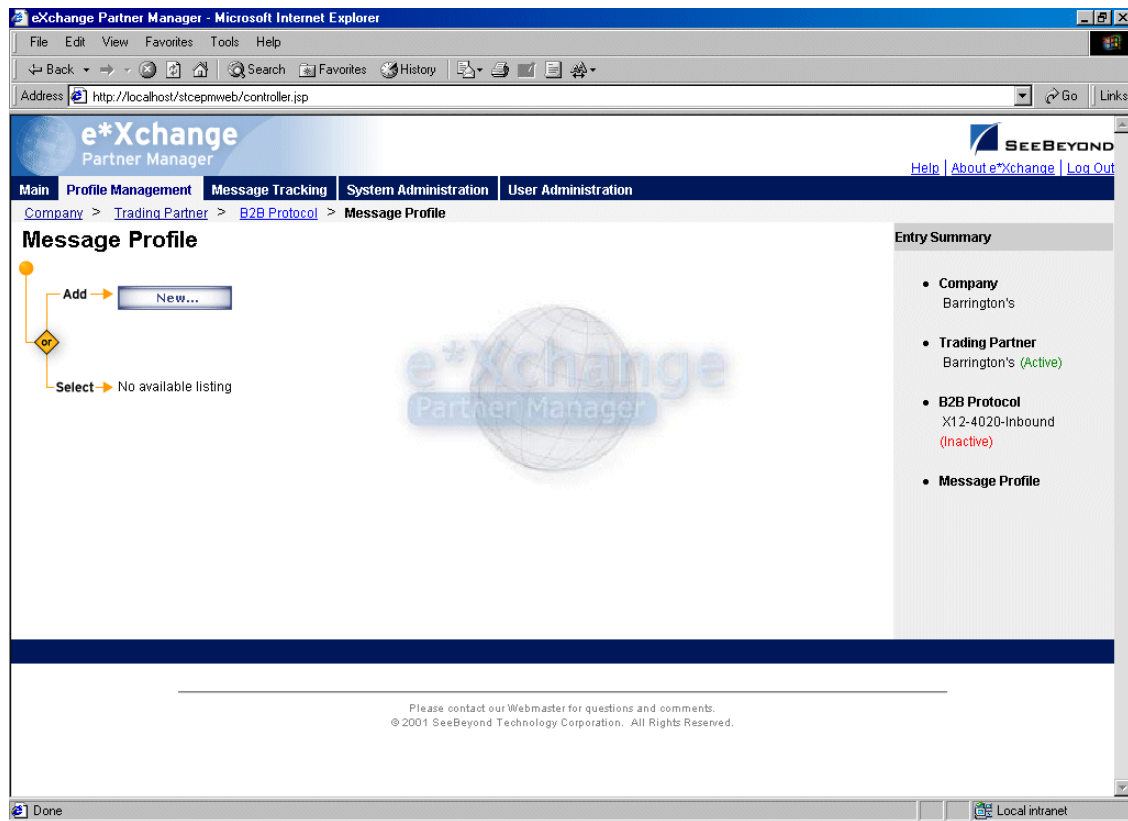
The Company, Trading Partner, and B2B Protocol (inbound and outbound) levels must be set up first. For information on setting up these components, refer to [“Web Interface: Profile Management” on page 71](#).

6.1 Setting Up X12 Message Profile Information

Once you have set up outbound and inbound B2B protocol information for a trading partner, the next step is to set up message profiles for each message that you will be sending to the trading partner (for the outbound B2B protocol) or receiving from the trading partner (for the inbound B2B protocol).

From the **B2B Protocol** page, select a B2B protocol and click **Continue: Message Profile** to access the **Message Profile** page (see Figure 67).

Figure 67 Message Profile Page



From the **Message Profile** page you can complete the following activities:

- Add a message profile for the selected B2B protocol (see [“To add a message profile” on page 102](#))
- Select a message profile: choose from the drop-down list. The message profile **General** properties are displayed on the right side of the page. Click on links for additional groups of properties above the properties display to view those additional properties (specific property groups vary according to the ebusiness protocol).
- Edit the selected message profile; first select the section that you want to edit, and then click the **Edit** button to access the **Message Profile - editing** page (see [“To edit a message profile” on page 109](#))
- Create a new message profile based on the selected one (see [“To copy a message profile” on page 110](#))
- Delete the selected message profile (see [“To delete a message profile” on page 112](#))
- Activate or deactivate the selected message profile (see [“To deactivate \(or reactivate\) a message profile” on page 112](#))
- Set or change security for the selected message profile (see [“Web Interface: Security” on page 97](#))

To add a message profile

- 1 From the **Message Profile** page, click the **New** button to access the **Message Profile - adding** page (General section) (see Figure 68).

Figure 68 Message Profile - adding (General section) (X12)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile".

The main content area is titled "Message Profile - adding". It contains a "General" section with the following fields:

eBusiness Protocol	X12
IC Version	4020
FG Version	4020
Direction	Outbound
Logical Name	
Include IC/FG Envelope	<input checked="" type="checkbox"/>
Name	
Transfer Mode	Batch
Validation Collaboration	
Message Profile Status	Active
Repeat Batch Last Check Time[MM/DD/YYYY hh:mm:ss]	01/01/1970 12:01:00
Batch Repeat Time	
Batch Repeat Granularity[H-hour,Ml-minute,D-day]	
Batch Time[hh:mm:ss]	

The "Entry Summary" sidebar on the right shows the following configuration:

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
X12-4020-Outbound (Active)
- **Message Profile**

- 2 Enter or select values for the General section.
For more information, refer to [Table 25 on page 105](#).
- 3 Click **Continue** to access the Interchange Control section (see Figure 69).

Figure 69 Message Profile - adding (Interchange Control section) (X12)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "Message Profile - adding".

The "Interchange Control Envelope" section contains the following fields:

Interchange Control Envelope		
ISA01 Author Information Qualifier	*	00
ISA02 Author Information		
ISA03 Security Information Qualifier	*	00
ISA04 Security Information		
ISA05 Interchange Sender Identification Qualifier	*	01
ISA06 Interchange Sender Identifier	*	123456789
ISA07 Interchange Receiver Identification Qualifier	*	01
ISA08 Interchange Receiver Identifier	*	987654321
ISA11 Repeating Element Separator	*	^
ISA12 Interchange Version Number	*	00402
ISA13 IC Control Number	*	12
ISA15 Usage Indicator	*	P
ISA16 Composite Element Separator	*	>
Element Separator	*	*
Segment Terminator	*	~

The "Entry Summary" sidebar on the right lists the following information:

- Company**
Barrington's
- Trading Partner**
Barrington's (Active)
- B2B Protocol**
X12-4020-Outbound (Active)
- Message Profile**

- 4 Enter or select values for the Interchange Control section.
For more information, refer to [Table 26 on page 107](#).
- 5 Click **Continue** to access the Functional Group section (see Figure 70).

Figure 70 Message Profile - adding (Functional Group section) (X12)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile".

Message Profile - adding

Functional Group Envelope	
GS01 Functional Identification Code *	<input type="text"/>
GS02 Application Sender Code *	<input type="text"/>
GS03 Application Receiver Code *	<input type="text"/>
GS06 Group Control Number *	12
GS07 RESP Agency Code *	X
GS08 Version/Release/Industry Identification Code *	004020X099

Buttons:

Entry Summary

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
X12-4020-Outbound (Active)
- **Message Profile**

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- 6 Enter or select values for the Functional Group section.
For more information, refer to [Table 27 on page 108](#).
- 7 Click **Continue** to access the Transaction Set section (see Figure 71).

Figure 71 Message Profile - adding (Transaction Set section) (X12)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "Message Profile - adding".

The "Transaction Set Envelope" section contains two required fields:

- ST01 Transaction Set Identification Code *
- ST02 TS Control Number *

Below the fields are three buttons: "Cancel", "Go Back", and "Continue".

The "Entry Summary" sidebar on the right shows the following configuration:

- Company: Barrington's
- Trading Partner: Barrington's (Active)
- B2B Protocol: X12-4020-Outbound (Active)
- Message Profile

At the bottom of the page, there is a footer with the text: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved."

For more information, refer to [Table 28 on page 108](#).

- 8 Click **Continue** to access the Return Messages section.
- 9 Define return messages.

Note: Define all message profiles for the B2B protocol, both inbound and outbound (acknowledgment and response messages), before defining return messages.

- 10 Click **Apply** to save the profile and go to the **Message Profile** page.

Table 25 Message Profile, General Section (X12): Fields

Name	Description
eBusiness Protocol	Displayed; the name of the protocol as selected earlier.
Version	The eBusiness protocol version that you selected earlier.
Direction	The direction for the message profile: Inbound or Outbound.
Logical Name	If you specified a logical name at the B2B protocol level, it is displayed.

Table 25 Message Profile, General Section (X12): Fields (Continued)

Name	Description
Include IC/FG Envelope	<p>If your internal system expects the ISA/IEA and GS/GE segments on incoming transactions, you must set this value to Y. If your internal system does not use these segments, set to N. If set to N, e*Xchange relays only the ST/SE header and footer with the message. Note: For inbound messages, if your internal system expects the ISA/IEA and GS/GE segments on incoming messages, this flag must be set correctly for the messages to be read successfully.</p>
Name	A label for the message profile. It should be descriptive, and unique for the trading partner.
Transfer Mode	The way in which the eBusiness messages are transmitted to, or received from, the trading partner: Batch, Fast Batch, or Interactive.
Validation Collaboration	The name of the Collaboration that verifies and translates message profiles of this type.
Message Profile Status	<p>The status of the message profile. Choose one of the following values. Active—The message profile is currently active, and can be used. Inactive—The message profile is not active, and cannot be used. Default: Active. Note: This is only available when adding a message profile. When editing, you can change the status on the Message Profile - Viewing page.</p>
Repeat Batch Last Check Time (batch only)	<p>Once the first batch has been sent out, this is automatically updated by e*Xchange. Display-only. Maximum 255 characters. Default: 01/01/1970 12:01:00.</p>
Batch Repeat Time/ Batch Repeat Granularity (batch only)	<p>To send batches at regular intervals, use these two attributes. BATCH REPEAT TIME sets the numerical value, and BATCH REPEAT GRANULARITY sets the time period: H for hours, MI for minutes, and D for days. For example, BATCH REPEAT TIME of 4 and BATCH REPEAT GRANULARITY of H means that batches will be sent out every four hours; values of 30 and MI mean that batches will be sent out every 30 minutes. Note: If you want to send batches at a preset daily time, do not set values for these attributes. Use BATCH TIME. If you set values for Batch Repeat Time/ Batch Repeat Granularity and also Batch Time, the Batch Time setting takes precedence. Note: If you use these fields to control batching, you can have a maximum of 10 Batch e*Ways running. This is because the display-only Repeat Batch Last Check Time field has a maximum of 255 characters.</p>
Batch Time (batch only)	<p>To send batches at a preset daily time, enter the time in the format hh:mm:ss (military time); for example, 09:00:00 for 9am or 15:30:00 for 3pm. If the batch is being set at a preset daily time, you do not need to set any other attributes. You can also set multiple batch times, using the pipe symbol as the delimiter (up to 50 characters). For example, 09:00:00 17:30:00 24:00:00 sends out batches at 9am, 5:30pm, and midnight. The values must be in ordered sequence, from the earliest times to the latest. Note: If you set values for Batch Repeat Time/ Batch Repeat Granularity and also Batch Time, the Batch Time setting takes precedence.</p>

Table 26 Message Profile, Interchange Control Section (X12): Fields

Name	Description
ISA01 Author Information Qualifier	The Authorization Information Qualifier; a code to identify the type of information in the Authorization Information (ISA02).
ISA02 Author Information	The Authorization Information; information used for additional identification or authorization of the interchange sender or the data in the interchange. The type of information is set by the Authorization Information Qualifier (ISA01).
ISA03 Security Information Qualifier	The code that identifies the type of information in the Security Information (ISA04).
ISA04 Security Information	Used for identifying the security information about the interchange sender or the data in the interchange. The type of information is set by the Security Information Qualifier (ISA03).
ISA05 Interchange Sender Identification Qualifier	The code that designates the system/method of code structure used to designate the sender or receiver ID element being qualified (ISA06).
ISA06 Interchange Sender Identifier	The identification code published by the sender for other parties to use as the receiver ID to route data to them. The sender always codes this value in the Sender ID element.
ISA07 Interchange Receiver Identification Qualifier	Qualifier to designate the system/method of code structure used to designate the sender or receiver ID element being qualified.
ISA08 Interchange Receiver Identifier	Identification code published by the receiver of the data. When sending, it is used by the sender as the sending ID. Other parties sending to them will use this as a receiving ID to route data to them.
ISA11 IC Standards Identifier	A code to identify the agency responsible for the control standard used by the message that is enclosed by the interchange header and trailer.
ISA12 Interchange Version Number	The version number for the interchange control segments.
ISA13 IC Control Number	Interchange control number: a control number assigned by the sender. This setting in the partner profile affects outbound messages only. e*Xchange does the following: Checks the number stored in the database, increments by one (which ensures that the value is always unique), uses that value, stores the value in the IC segment of the message, and updates the database. Note: Since the interchange control number must be unique for each interchange, it is important that this value is not set to a negative number. The initial value must be 0 or greater.
ISA15 Test Indicator or Usage Indicator (depending on X12 version)	A code to indicate whether the data enclosed in the interchange envelope is test, production, or information.

Table 26 Message Profile, Interchange Control Section (X12): Fields (Continued)

Name	Description
ISA16 Composite Element Separator	Component element separator: the delimiter used to separate component data elements within a composite data structure (must be different from the data element separator and the segment terminator).
Element Separator	The separator symbol used to separate data elements.
Segment Terminator	The symbol used to indicate the end of the segment.

Table 27 Message Profile, Functional Group Section (X12): Fields

Name	Description
GS01 Functional Identification Code	The two-letter code that identifies a specific transaction within the transaction set. For example, for a 997, Functional Acknowledgment, the functional ID code is FA.
GS02 Application Sender Code	The code that identifies the sender of the transmission. The codes are agreed-upon by trading partners.
GS03 Application Receiver Code	The code that identifies the receiver of the transmission. The codes are agreed-upon by trading partners.
GS06 Group Control Number	Functional group control number: a control number assigned by the message sender. The group control number must be unique within the interchange. This setting in the partner profile affects outbound messages only. Note: Make sure the initial value is 0 or greater. e*Xchange checks the number stored in the database, increments by one, uses that value, and updates the database. Note: The Functional Group control number GS06 in the header must be identical to the same data element in the associated Functional Group trailer, GE02.
GS07 RESP Agency Code	Responsible Agency Code: the code used in conjunction with GS08.
GS08 Version/Release/Industry Identification Code	This code indicates the version, release, subrelease, and industry identifier of the EDI standard being used, including the GS and GE segments. This segment will have the following values, according to the values in GS07: GS07 code X-positions 1-3 are the version number, positions 4-6 are the release and subrelease level of the version, and positions 7-12 are the industry or trade association identifiers (optionally assigned by the user). GS07 code T-other formats are allowed.

Table 28 Message Profile, Transaction Set Section (X12): Fields

Name	Description
ST01 Transaction Set Identification Code	The unique ID code assigned to the transaction set; for example, 850 for a Purchase Order or 837 for a Health Care Claim.

Table 28 Message Profile, Transaction Set Section (X12): Fields (Continued)

Name	Description
ST02 TS Control Number	<p>Transaction set control number: a control number assigned by the sender. This setting in the partner profile affects outbound messages only.</p> <p>Note: The control number in ST02 must be identical with that in SE02, and must be unique within a Functional Group (GS-GE). The number also aids in error resolution research. For example, start with the number 0001 and increment from there.</p> <p>The ST02 works a little differently depending on the Transfer Mode, as follows:</p> <p>For Batch or Fast Batch messages, e*Xchange does the following: Regardless of the value set in this field, e*Xchange always sets the Transaction Set control number to 1 within each Functional Group. This is due to conflicts in control numbers if more than one transaction set type is included in a single Functional Group.</p> <p>For Interactive messages, e*Xchange does the following: Transaction Set Control Number 0 or greater—e*Xchange increments from the initial value.</p> <p>Transaction Set Control Number less than 0—Control number always starts at 1, within each Functional Group.</p>

To edit a message profile

- 1 From the **Message Profile** page, select the message profile from the drop-down list.
- 2 In the Message Profile Properties section, click the link for the section you want to edit: **General**, **Interchange Control Envelope**, **Functional Group Envelope**, **Transaction Set Envelope**, or **Return Messages**.
- 3 Click the **Edit** button to access the **Message Profile - editing** page listing the attribute section that you selected (see Figure 72).

Figure 72 Message Profile - editing (General section) (X12)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "Message Profile - editing".

The "General" section contains the following fields:

eBusiness Protocol	X12
IC Version	4020
FG Version	4020
Direction	Outbound
Logical Name	
Include IC/FG Envelope	<input checked="" type="checkbox"/>
Name	X12-4020
Transfer Mode	Batch
Validation Collaboration	
Batch Last Send Time[MM/DD/YYYY hh:mm:ss]	01/01/1970 12:01:00
Batch Repeat Time	
Batch Repeat Granularity[H-hour,M-minute,D-day]	
Batch Time[hh:mm:ss]	

At the bottom of the form are "Cancel" and "Apply" buttons. On the right side, there is an "Entry Summary" section with the following information:

- Company: Barrington's
- Trading Partner: Barrington's (Active)
- B2B Protocol: X12-4020-Outbound (Active)
- Message Profile: X12-4020 (Active)

The browser status bar shows http://localhost/stcepmweb/sys_admin_menu.jsp and "Local intranet".

4 Change the values as needed.

For more information on specific values, refer to the appropriate table:

- ♦ General—[Table 25 on page 105](#)
- ♦ Interchange Control Envelope—[Table 26 on page 107](#)
- ♦ Functional Group Envelope—[Table 27 on page 108](#)
- ♦ Transaction Set Envelope—[Table 28 on page 108](#)

5 Click **Apply** to save the changes and return to the **Message Profile** page.

To copy a message profile

- 1 On the **Message Profile** page, select the message profile that you want to copy.
- 2 Click the **Copy** button.

The **Message Profile - copying** page (General section) appears (see Figure 73).

Figure 73 Message Profile - copying (General section) (X12)

e*Exchange Partner Manager

Navigation: Main | Profile Management | Message Tracking | System Administration | User Administration

Breadcrumb: Company > Trading Partner > B2B Protocol > Message Profile

Message Profile - copying

General	
eBusiness Protocol	X12
IC Version	4020
FG Version	4020
Direction	Outbound
Logical Name	
Include IC/FG Envelope	<input checked="" type="checkbox"/>
Name	X12-4020
Transfer Mode	Batch
Validation Collaboration	
Message Profile Status	Active
Batch Last Send Time[MM/DD/YYYY hh:mm:ss]	01/01/1970 12:01:00
Batch Repeat Time	
Batch Repeat Granularity[H-hour,M-minute,D-day]	
Batch Time[hh:mm:ss]	

Entry Summary

- Company**
Barrington's
- Trading Partner**
Barrington's (Active)
- B2B Protocol**
X12-4020-Outbound (Active)
- Message Profile**
X12-4020 (Active)

- 3 Change the values for the **General** attributes as needed.
For more information, see [Table 25 on page 105](#).
- 4 Click **Continue**.
- 5 Change the values for the **Interchange Control Envelope** as needed.
For more information, see [Table 26 on page 107](#).
- 6 Click **Continue**.
- 7 Change the values for the **Functional Group Envelope** as needed.
For more information, see [Table 27 on page 108](#).
- 8 Click **Continue**.
- 9 Change the values for the **Transaction Set Envelope** as needed.
For more information, see [Table 28 on page 108](#).
- 10 Click **Continue**.
- 11 Change the values for return messages as needed.

Note: Define all message profiles for the B2B protocol, both inbound and outbound (acknowledgment and response messages), before defining return messages.

12 Click **Apply**.

You are returned to the **B2B Protocol** page. The new message profile is now on the drop-down list.

To delete a message profile



- 1 On the **Message Profile** page, select the message profile from the drop-down list.
- 2 Click the **Delete** button.

A warning message appears asking if you are sure you want to delete.
- 3 To delete the profile, click **OK**.

The message profile is deleted.

To deactivate (or reactivate) a message profile

- 1 On the **Message Profile** page, select the message profile from the drop-down list.

The message profile properties are displayed on the right side of the page.
- 2 In the **Message Profile Status** field, toggle the Active/Inactive graphic to change the status. Values are as follows:
 - ♦  Message profile is active: click to deactivate
 - ♦  Message profile is inactive: click to reactivate.

To set up security

- From the **Message Profile** page, click the **Security** button to access the **Security Management** page.

For detailed instructions on setting up security, refer to [“Web Interface: Security” on page 97](#).

Web Interface: Profile Setup for UN/EDIFACT

This chapter provides information on setting up UN/EDIFACT messages in the e*Xchange Partner Manager, at the Message Profile level.

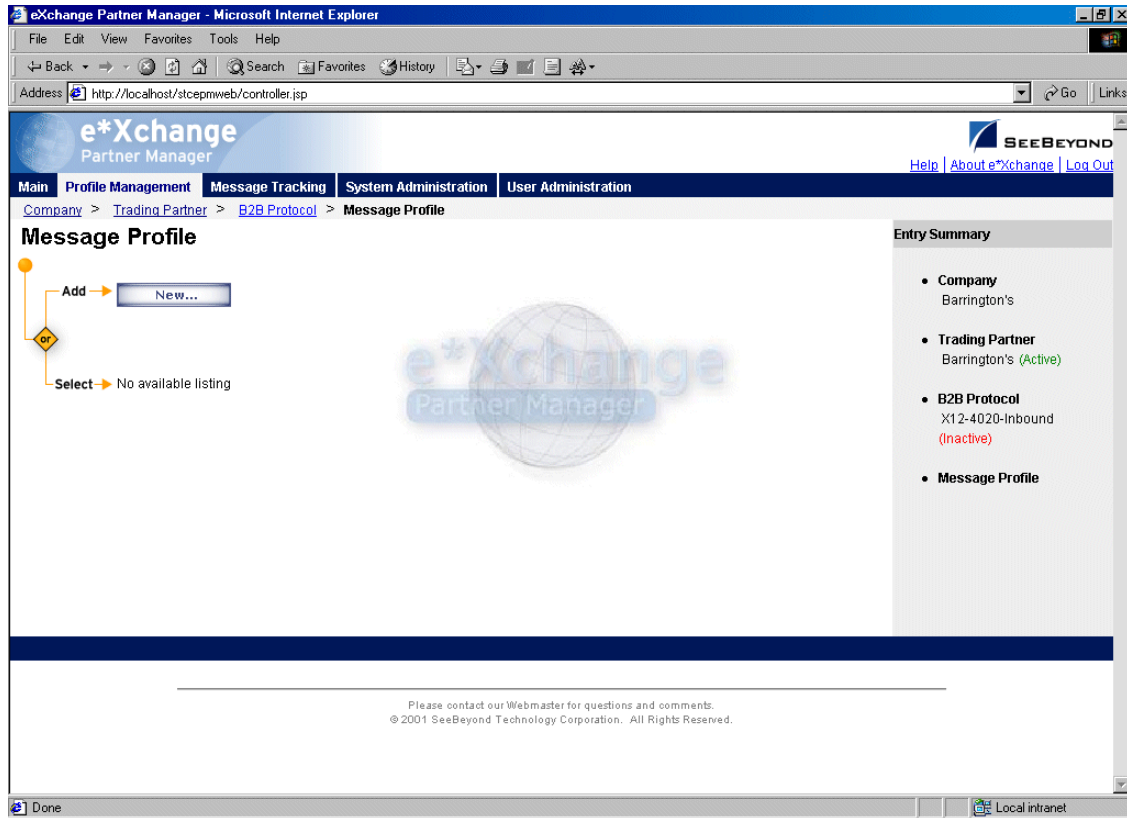
The Company, Trading Partner, and B2B Protocol (inbound and outbound) levels must be set up first. For information on setting up these components, refer to [“Web Interface: Profile Management” on page 71](#).

7.1 Setting Up UN/EDIFACT Message Profile Information

Once you have set up outbound and inbound B2B protocol information for a trading partner, the next step is to set up message profiles for each message that you will be sending to the trading partner (for the outbound B2B protocol) or receiving from the trading partner (for the inbound B2B protocol).

From the **B2B Protocol** page, select a B2B protocol and click **Continue: Message Profile** to access the **Message Profile** page (see Figure 74).

Figure 74 Message Profile Page



From the **Message Profile** page you can complete the following activities:

- Add a message profile for the selected B2B protocol (see [“To add a message profile” on page 115](#))
- Select a message profile: choose from the drop-down list. The message profile **General** properties are displayed on the right side of the page. Click on links for additional groups of properties above the properties display to view those additional properties (specific property groups vary according to the ebusiness protocol).
- Edit the selected message profile; first select the section that you want to edit, and then click the **Edit** button to access the **Message Profile - editing** page (see [“To edit a message profile” on page 118](#))
- Create a new message profile based on the selected one (see [“To copy a message profile” on page 119](#))
- Delete the selected message profile (see [“To delete a message profile” on page 121](#))
- Activate or deactivate the selected message profile (see [“To deactivate \(or reactivate\) a message profile” on page 121](#))
- Set or change security for the selected message profile (see [“Web Interface: Security” on page 97](#))

To add a message profile

- 1 From the **Message Profile** page, click the **New** button to access the **Message Profile - adding** page (General section) (see Figure 75).

Figure 75 Message Profile - adding (General section) (UN/EDIFACT)

e*Exchange Partner Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History

Address http://localhost/stcepmweb/controller.jsp Go Links

e*Exchange Partner Manager **SEEBEYOND**

Help About e*Exchange Log Out

Main Profile Management Message Tracking System Administration User Administration

Company > Trading Partner > B2B Protocol > Message Profile

Message Profile - adding

General	
eBusiness Protocol	EDF
Version	4B
Direction	Outbound
Logical Name	
Functional Group Envelope Custom Validation	
Interchange Envelope Custom Validation	
Message Envelope Custom Validation	
Name *	
Transfer Mode *	Batch
Validation Collaboration	
Message Profile Status *	Active
Include Functional Group *	Y
Message Classification Type *	B
Repeat Batch Last Check Time[MM/DD/YYYY hh:mm:ss]	01/01/1970 12:01:00

Entry Summary

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
UN/EDIFACT-4B-Outbound (Active)
- **Message Profile**

http://localhost/stcepmweb/sys_admin_menu.jsp Local intranet

- 2 Enter or select values for the General section.

For more information, refer to [Table 29 on page 122](#) (for version 3B), [Table 33 on page 126](#) (for version 4B), or [Table 37 on page 132](#) (for version 4I).

- 3 Click **Continue** to access the Interchange Control section (see Figure 76).

Figure 76 Message Profile - adding (Interchange Control section) (UN/EDIFACT)

e*Exchange Partner Manager

Microsoft Internet Explorer

Address: http://localhost/stcepmweb/controller.jsp

Main | Profile Management | Message Tracking | System Administration | User Administration

Company > Trading Partner > B2B Protocol > Message Profile

Message Profile - adding

Interchange Control Envelope	
Acknowledgment Request	<input type="text"/>
Application Reference	<input type="text"/>
Character Coding	<input type="text"/>
Service Code List Directory Version Number	<input type="text"/>
Component Element Separator *	<input type="text"/>
Decimal Symbol *	<input type="text"/>
Element Separator *	<input type="text"/>
Interchange Agreement Identification	<input type="text"/>
Processing Priority Code	<input type="text" value="1"/>
Interchange Recipient Identifier *	<input type="text" value="12"/>
Interchange Recipient Internal Identifier	<input type="text"/>
Interchange Recipient Internal Sub-Identifier	<input type="text"/>
Interchange Recipient Identification Qualifier *	<input type="text" value="12"/>
Recipient Reference Password	<input type="text"/>
Recipient Reference Qualifier	<input type="text"/>

Entry Summary

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
UN/EDIFACT-4B-Outbound (Active)
- **Message Profile**

Done Local intranet

- 4 Enter or select values for the Interchange Control section.

For more information, refer to [Table 30 on page 123](#) (for version 3B), [Table 34 on page 128](#) (for version 4B), or [Table 38 on page 133](#) (for version 4I).

- 5 Click **Continue** to access the Functional Group section (see Figure 77).

Figure 77 Message Profile - adding (Functional Group section) (UN/EDIFACT)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "Message Profile - adding".

The "Functional Group Envelope" section contains the following fields:

Application Password	<input type="text"/>
Include Functional Group *	<input type="text" value="Y"/>
Message Classification Type *	<input type="text" value="B"/>
Application Receiver Identification Code *	<input type="text"/>
Application Receiver Identification Qualifier	<input type="text"/>
Application Sender Identification Code *	<input type="text"/>
Application Sender Identification Qualifier	<input type="text"/>

Below the fields are three buttons: "Cancel", "Go Back", and "Continue".

The "Entry Summary" section on the right lists the following information:

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
UN/EDIFACT-4B-Outbound (Active)
- **Message Profile**

At the bottom of the page, there is a footer with the text: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved."

- 6 Enter or select values for the Functional Group section.

For more information, refer to [Table 31 on page 125](#) (for version 3B) or [Table 35 on page 130](#) (for version 4B).

- 7 Click **Continue** to access the Message Envelope section (see Figure 78).

Figure 78 Message Profile - adding (Message Envelope section) (UN/EDIFACT)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows 'http://localhost:8080/cepmweb/controller.jsp'. The page title is 'e*Exchange Partner Manager'. The navigation menu includes 'Main', 'Profile Management', 'Message Tracking', 'System Administration', and 'User Administration'. The breadcrumb trail is 'Company > Trading Partner > B2B Protocol > Message Profile'. The main heading is 'Message Profile - adding'.

The 'Message Envelope' section contains the following fields:

Association Assigned Code	<input type="text"/>
Code List Directory Version Number	<input type="text"/>
Common Access Reference	<input type="text"/>
Controlling Agency	<input type="text" value="UN"/>
Message Type Release Number	<input type="text" value="00A"/>
Message Type Identifier	<input type="text"/>
Message Type Version	<input type="text" value="D"/>
Message Implementation Guideline Controlling Agency	<input type="text"/>
Message Implementation Guideline Identifier	<input type="text"/>
Message Implementation Guideline Release Number	<input type="text"/>
Message Implementation Guideline Version	<input type="text"/>
Message Scenario Controlling Agency	<input type="text"/>
Message Scenario Identifier	<input type="text"/>
Message Scenario Release Number	<input type="text"/>

The 'Entry Summary' section on the right lists the following details:

- Company**
Barrington's
- Trading Partner**
Barrington's (Active)
- B2B Protocol**
UN/EDIFACT-4B-Outbound (Active)
- Message Profile**

- 8 Enter or select values for the Message Envelope section.

For more information, refer to [Table 32 on page 126](#) (for version 3B), [Table 36 on page 131](#) (for version 4B), or [Table 39 on page 135](#) (for version 4I).

- 9 Click **Continue** to access the Return Messages section.
- 10 Define return messages.
- 11 Click **Apply** to save the profile and go to the **Message Profile** page.

To edit a message profile

- 1 From the **Message Profile** page, select the message profile from the drop-down list.
- 2 In the Message Profile Properties section, click the link for the section you want to edit: **General**, **Interchange Control Envelope**, **Functional Group Envelope**, **Message Envelope**, or **Return Messages**.
- 3 Click the **Edit** button to access the **Message Profile - editing** page listing the attribute section that you selected (see Figure 79).

Figure 79 Message Profile - editing (General section) (X12)

e*Exchange Partner Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search History

Address <http://localhost/stcepmweb/controller.jsp> Go Links

e*Exchange Partner Manager **SEEBEYOND**

Help | About e*Exchange | Log Out

Main | **Profile Management** | Message Tracking | System Administration | User Administration

Company > Trading Partner > B2B Protocol > Message Profile

Message Profile - editing

General	
eBusiness Protocol	X12
IC Version	4020
FG Version	4020
Direction	Outbound
Logical Name	
Include IC/FG Envelope	<input checked="" type="checkbox"/>
Name	X12-4020
Transfer Mode	Batch
Validation Collaboration	
Batch Last Send Time[MM/DD/YYYY hh:mm:ss]	01/01/1970 12:01:00
Batch Repeat Time	
Batch Repeat Granularity[H-hour,M-minute,D-day]	
Batch Time[hh:mm:ss]	

Cancel Apply

Entry Summary

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
X12-4020-Outbound (Active)
- **Message Profile**
X12-4020 (Active)

http://localhost/stcepmweb/sys_admin_menu.jsp Local intranet

4 Change the values as needed.

For more information, refer to the section for the appropriate UN/EDIFACT version:

Section	Version 3B	Version 4B	Version 4I
General	Table 29 on page 122	Table 33 on page 126	Table 37 on page 132
Interchange Control	Table 30 on page 123	Table 34 on page 128	Table 38 on page 133
Functional Group	Table 31 on page 125	Table 35 on page 130	N/A
Message	Table 32 on page 126	Table 36 on page 131	Table 39 on page 135

5 Click **Apply** to return to the **Message Profile** page.

To copy a message profile

- 1 On the **Message Profile** page, select the message profile that you want to copy.
- 2 Click the **Copy** button.

The **Message Profile - copying** page (General section) appears (see Figure 80).

Figure 80 Message Profile - copying (General section) (UN/EDIFACT)

e*Exchange Partner Manager

Microsoft Internet Explorer

Address: http://localhost/stcepmweb/controller.jsp

Main | Profile Management | Message Tracking | System Administration | User Administration

Company > Trading Partner > B2B Protocol > Message Profile

Message Profile - copying

General	
eBusiness Protocol	X12
IC Version	4020
FG Version	4020
Direction	Outbound
Logical Name	
Include IC/FG Envelope	<input checked="" type="checkbox"/>
Name	X12-4020
Transfer Mode	Batch
Validation Collaboration	
Message Profile Status	Active
Batch Last Send Time[MM/DD/YYYY hh:mm:ss]	01/01/1970 12:01:00
Batch Repeat Time	
Batch Repeat Granularity[H-hour,M-minute,D-day]	
Batch Time[hh:mm:ss]	

Entry Summary

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
X12-4020-Outbound (Active)
- **Message Profile**
X12-4020 (Active)

- 3 Change the values for the **General** attributes as needed.
For more information, refer to one of the following tables:
For version 3B—[Table 29 on page 122](#)
For version 4B—[Table 33 on page 126](#)
For version 4I—[Table 37 on page 132](#).
- 4 Click **Continue**.
- 5 Change the values for the **Interchange Control Envelope** as needed.
For more information, refer to one of the following tables:
For version 3B—[Table 30 on page 123](#)
For version 4B—[Table 34 on page 128](#)
For version 4I—[Table 38 on page 133](#).
- 6 Click **Continue**.
- 7 Change the values for the **Functional Group Envelope** as needed.
For more information, refer to one of the following tables:
For version 3B—[Table 31 on page 125](#)
For version 4B—[Table 35 on page 130](#)

- 8 Click **Continue**.
- 9 Change the values for the Message Envelope as needed.
For more information, refer to one of the following tables:
For version 3B—[Table 32 on page 126](#)
For version 4B—[Table 36 on page 131](#)
For version 4I—[Table 39 on page 135](#).



- 10 Click **Continue**.
- 11 Change the values for return messages as needed.
- 12 Click **Apply**.
You are returned to the **B2B Protocol** page. The new message profile is now on the drop-down list.

To delete a message profile

- 1 On the **Message Profile** page, select the message profile from the drop-down list.
- 2 Click the **Delete** button.
A warning message appears asking if you are sure you want to delete.
- 3 To delete the profile, click **OK**.
The message profile is deleted.

To deactivate (or reactivate) a message profile

- 1 On the **Message Profile** page, select the message profile from the drop-down list.
The message profile properties are displayed on the right side of the page.
- 2 In the **Message Profile Status** field, toggle the Active/Inactive graphic to change the status. Values are as follows:

- ♦  Message profile is active: click to deactivate
- ♦  Message profile is inactive: click to reactivate.

To set up security

- From the **Message Profile** page, click the **Security** button to access the **Security Management** page.
For detailed instructions on setting up security, refer to [“Web Interface: Security” on page 97](#).

7.2 UN/EDIFACT Message Profile Parameter Values

This section lists field descriptions for the UN/EDIFACT values required for setting up a message profile.

Field descriptions are listed separately for each version:

- Version 3 Batch—See [“Version 3 Batch” on page 122](#)
- Version 4 Batch—See [“Version 4 Batch” on page 126](#)
- Version 4 Interactive—See [“Version 4 Interactive” on page 132](#)

7.2.1 Version 3 Batch

This section includes field descriptions for UN/EDIFACT version 3 Batch, for the following Message Profile setup sections:

- General section—[Table 29 on page 122](#)
- Interchange Control section—[Table 30 on page 123](#)
- Functional Group section—[Table 31 on page 125](#)
- Message Envelope section—[Table 32 on page 126](#)

Table 29 Message Profile, General Section (UN/EDIFACT 3B): Fields

Name	Description
eBusiness Protocol	Displayed; the name of the protocol as selected earlier.
Version	The eBusiness protocol version that you selected earlier.
Direction	The direction for the message profile: Inbound or Outbound.
Logical Name	If you specified a logical name at the B2B protocol level, it is displayed.
Functional Group Envelope Custom Validation	If you have a custom Validation for the functional envelope layer, type the name.
Interchange Envelope Custom Validation	If you have a custom Validation for the interchange envelope layer, type the name.
Message Envelope Custom Validation	If you have a custom Validation for the message envelope (UNH) layer, type the name.
Name	A label for the message profile. It should be descriptive, and unique for the trading partner.
Transfer Mode	The way in which the eBusiness messages are transmitted to, or received from, the trading partner: Batch, Fast Batch, or Interactive.
Validation Collaboration	The name of the Collaboration that verifies and translates message profiles of this type.

Table 29 Message Profile, General Section (UN/EDIFACT 3B): Fields (Continued)

Name	Description
Message Profile Status	The status of the message profile. Choose one of the following values. Active—The message profile is currently active, and can be used. Inactive—The message profile is not active, and cannot be used. Default: Active. Note: This is only available when adding a message profile. When editing, you can change the status on the Message Profile - Viewing page.
Message Classification Type	A flag to specify the message type for the message: B for batch, I for interactive. Certain types of UN/EDIFACT messages are not batched. Since you are using version 3 Batch, this field defaults to B. Do not change it.
Repeat Batch Last Check Time	Once the first batch has been sent out, this is automatically updated by e*Xchange. Display-only. Default: 01/01/1970 12:01:00 .
Batch Repeat Time/ Batch Repeat Granularity	To send batches at regular intervals, use these two attributes. BATCH REPEAT TIME sets the numerical value, and BATCH REPEAT GRANULARITY sets the time period: H for hours, MI for minutes, and D for days. For example, BATCH REPEAT TIME of 4 and BATCH REPEAT GRANULARITY of H means that batches will be sent out every four hours; values of 30 and MI mean that batches will be sent out every 30 minutes. Note: If you want to send batches at a preset daily time, do not set values for these attributes. Use BATCH TIME. If you set values for Batch Repeat Time/ Batch Repeat Granularity and also Batch Time, the Batch Time setting takes precedence. Note: If you use these fields to control batching, you can have a maximum of 10 Batch e*Ways running. This is because the display-only Batch Last Send Time field has a maximum of 255 characters.
Batch Time	To send batches at a preset daily time, enter the time in the format hh:mm:ss (military time); for example, 09:00:00 for 9am or 15:30:00 for 3pm. If the batch is being set at a preset daily time, you do not need to set any other attributes. You can also set multiple batch times, using the pipe symbol as the delimiter (up to 50 characters). For example, 09:00:00 17:30:00 24:00:00 sends out batches at 9am, 5:30pm, and midnight. The values must be in ordered sequence, from the earliest times to the latest. Note: If you set values for Batch Repeat Time/ Batch Repeat Granularity and also Batch Time, the Batch Time setting takes precedence.

Table 30 Message Profile, Interchange Control Section (UN/EDIFACT 3B): Fields

Name	Description
Acknowledgment Request	An optional one-digit code requesting acknowledgment for the interchange (UNB 090 0031).
Application Reference	An optional value identifying the application area assigned by the sender, to which the messages in the interchange relate; for example, the message type, if all the messages in the interchange are of the same type (UNB 070 0026). Whether or not this field is used, and if so the exact nature of the data, is specified in the trading partner Interchange Agreement.

Table 30 Message Profile, Interchange Control Section (UN/EDIFACT 3B): Fields (Continued)

Name	Description
Communication Agreement Identification	An optional name or code indicating the type of agreement under which the interchange takes place. 1–35 characters (UNB 100 0032).
Component Element Separator	The Component Data Element Separator: the symbol used as a component data element separator (delimiter). Default: colon (:). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 010).
Decimal Symbol	Decimal mark: the symbol used to indicate a decimal point. Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 030).
Element Separator	The Data Element Separator: the symbol used as a separator between data elements (delimiter). Default: plus sign (+). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 020).
Processing Priority Code	Optional: a single-character code determined by the sender requesting processing priority for the interchange (UNB 080-0029). Note: The Interchange Agreement must state whether the field is to be used. If it is used, a list of codes and meanings must be provided.
Interchange Recipient Identifier	(Required) The receiver's name or ID code, as specified in the Interchange Agreement (UNB 030 0010).
Interchange Recipient Identifier Qualifier	An optional qualifier referring to the receiver's identification code. Up to 4 characters (UNB 030 0007).
Recipient Reference Password	The reference or password required for the sender to access the recipient's system. Up to 14 characters (UNB 060 0022).
Recipient Reference Qualifier	An optional qualifier for the recipient's reference or password. Up to 4 characters (UNB 060 0025).
Release Character	The symbol used as a release character. Default: question mark (?). The release character, immediately preceding one of the other separators, restores its normal meaning. For example, 10?+10=20 means 10+10=20. Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 040).
Repetition Separator	The symbol used as a repetition separator (delimiter). Default: asterisk (*). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 050).
Reverse Receiver Routing Address	The routing address; the address that the recipient has specified the sender should include in the interchange. This is used by the recipient to facilitate routing of incoming messages (UNB 030 0014).
Reverse Sender Routing Address	The address for reverse routing; an address specified by the sender of an interchange to be included by the recipient in the response interchanges. This facilitates internal routing (UNB 020 0008).

Table 30 Message Profile, Interchange Control Section (UN/EDIFACT 3B): Fields (Continued)

Name	Description
Segment Terminator	The symbol used to indicate the end of a segment (delimiter). Default: apostrophe ('). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 060).
Interchange Sender Identifier	The sender's name or ID code, as specified in the interchange Agreement (UNB 020 0004).
Interchange Sender Identifier Qualifier	The qualifier for the Interchange Sender ID name or code. A qualifier code may refer to an organization identification, as in ISO 6523 (UNB 020 0007).
Interchange Syntax Identifier	The syntax level used (UNB 010 0001): UNOA for the basic level A UNOB for level B
Interchange Syntax Version	The EDIFACT version used at the interchange level (UNB 010 0002). e*Xchange supports versions 3 and 4. For the current version, ISO 9735-1, use 4. Use 3 for the 1988 version amended and reprinted in 1990 plus Amendment 1 of 1992.
Test Indicator	An optional single-digit numeric code (1, 2, 3, or 4) indicating that this is a test (UNB 110 0035).

Table 31 Message Profile, Functional Group Section (UN/EDIFACT 3B): Fields

Name	Description
Application Password	Optional: The reference or password required for the sender to access the recipient's division, department, or sectional application system/process (additional to the recipient's reference password at the interchange level, which is required). Up to 14 characters (UNG 080 0058).
Include Functional Group	Only applicable to outbound messages sent by Interactive transfer mode. This field indicates whether the trading partner requires group information (UNG/UNE segments) in the message.
Application Receiver Identification Code	Required: An additional ID code (for example, of a division, branch, or computer system or process), specified by the recipient to facilitate internal routing. Up to 35 characters (UNG 030 0044).
Application Receiver Identification Qualifier	Optional: A qualifier to the recipient's ID code. 4 characters (UNG 030 0007).
Application Sender Identification Code	Required: An additional ID code (for example, of a division, branch, or computer system or process), specified by the sender to facilitate internal routing. Up to 35 characters (UNG 020 0040).
Application Sender Identification Qualifier	An optional qualifier to the sender's ID code. 4 characters (UNG 020 0007).

Table 32 Message Profile, Message Envelope Section (UN/EDIFACT 3B): Fields

Name	Description
Association Assigned Code	Optional: a code that further identifies the message. Assigned by the association responsible for the design and maintenance of the message type concerned. Up to 6 characters (UNH 020 0057).
Common Access Reference	Optional: A reference serving as a key to relate all subsequent transfers of data to the same business case or file. Up to 35 characters (UNH 030 0068).
Controlling Agency	The code for the controlling agency (UNH 020 0051). For UN/EDIFACT, this value is always UN.
Message Type Release Number	Required: The release number within the current message version number. 1 to 3 characters (UNH 020 0054).
Message Type Identifier	Required: Message Type: A code identifying a type of message and assigned by its controlling agency. Up to 6 characters (UNH 020 0065).
Message Type Version	Required: The version number for the message type. Up to 3 characters (UNH 020 0052).
Message Transfer Indicator	Optional: First and Last Transfer: An indication used for the first and last message in a sequence of messages related to the same topic. One character (UNH 040 0073).
Message Sequence	The Sequence of Transfers, a number (up to two digits) assigned by the sender indicating the numerical sequence of one or more transfers (UNH 040 0070).

7.2.2 Version 4 Batch

This section includes field descriptions for UN/EDIFACT version 4 Batch, for the following Message Profile setup sections:

- General section—[Table 33 on page 126](#)
- Interchange Control section—[Table 34 on page 128](#)
- Functional Group section—[Table 35 on page 130](#)
- Message Envelope section—[Table 36 on page 131](#)

Table 33 Message Profile, General Section (UN/EDIFACT 4B): Fields

Name	Description
eBusiness Protocol	Displayed; the name of the protocol as selected earlier.
Version	The eBusiness protocol version that you selected earlier.
Direction	The direction for the message profile: Inbound or Outbound.
Logical Name	If you specified a logical name at the B2B protocol level, it is displayed.
Functional Group Envelope Custom Validation	If you have a custom Validation for the functional envelope layer, type the name.

Table 33 Message Profile, General Section (UN/EDIFACT 4B): Fields (Continued)

Name	Description
Interchange Envelope Custom Validation	If you have a custom Validation for the interchange envelope layer, type the name.
Message Envelope Custom Validation	If you have a custom Validation for the message envelope (UNH) layer, type the name.
Name	A label for the message profile. It should be descriptive, and unique for the trading partner.
Transfer Mode	The way in which the eBusiness messages are transmitted to, or received from, the trading partner: Batch, Fast Batch, or Interactive.
Validation Collaboration	The name of the Collaboration that verifies and translates message profiles of this type.
Message Profile Status	The status of the message profile. Choose one of the following values. Active—The message profile is currently active, and can be used. Inactive—The message profile is not active, and cannot be used. Default: Active. Note: This is only available when adding a message profile. When editing, you can change the status on the Message Profile - Viewing page.
Message Classification Type	A flag to specify the message type for the message: B for batch, I for interactive. Certain types of UN/EDIFACT messages are not batched. Since you are using version 4 Batch, this field defaults to B. Do not change it.
Repeat Batch Last Check Time	Once the first batch has been sent out, this is automatically updated by e*Xchange. Display-only. Default: 01/01/1970 12:01:00 .
Batch Repeat Time/ Batch Repeat Granularity	To send batches at regular intervals, use these two attributes. BATCH REPEAT TIME sets the numerical value, and BATCH REPEAT GRANULARITY sets the time period: H for hours, MI for minutes, and D for days. For example, BATCH REPEAT TIME of 4 and BATCH REPEAT GRANULARITY of H means that batches will be sent out every four hours; values of 30 and MI mean that batches will be sent out every 30 minutes. Note: If you want to send batches at a preset daily time, do not set values for these attributes. Use BATCH TIME. If you set values for Batch Repeat Time/ Batch Repeat Granularity and also Batch Time, the Batch Time setting takes precedence. Note: If you use these fields to control batching, you can have a maximum of 10 Batch e*Ways running. This is because the display-only Batch Last Send Time field has a maximum of 255 characters.
Batch Time	To send batches at a preset daily time, enter the time in the format hh:mm:ss (military time); for example, 09:00:00 for 9am or 15:30:00 for 3:30pm. If the batch is being set at a preset daily time, you do not need to set any other attributes. You can also set multiple batch times, using the pipe symbol as the delimiter: for example, 09:00:00 17:30:00 24:00:00 sends out batches at 9am, 5:30pm, and midnight. The values must be in ordered sequence, from the earliest times to the latest. Note: If you set values for Batch Repeat Time/ Batch Repeat Granularity and also Batch Time, the Batch Time setting takes precedence.

Table 34 Message Profile, Interchange Control Section (UN/EDIFACT 4B): Fields

Name	Description
Acknowledgment Request	An optional one-digit code requesting acknowledgment for the interchange (UNB 090 0031).
Application Reference	An optional value identifying the application area assigned by the sender, to which the messages in the interchange relate; for example, the message type, if all the messages in the interchange are of the same type (UNB 070 0026). Whether or not this field is used, and if so the exact nature of the data, is specified in the trading partner Interchange Agreement.
Character Encoding	(Optional) Character Encoding, Coded: the identification for the character encoding used in the interchange, as specified in the trading agreement (UNB 010 0133). Acceptable values: any three-character code as defined in the trading agreement. If you do not specify a value, e*Xchange assumes the default encoding technique defined for the syntax version being used: 1—ASCII 7-bit code. 2—ASCII 8-bit code. 3—Code page 500 (EBCDIC Multinational No. 5) encoding schema for the repertoire as defined by the code page. 4—Code page 850 (IBM PC Multinational) encoding schema for the repertoire as defined by the code page.
Service Code List Directory Version Number	The version number of the service code list directory (UNB 010 0080).
Component Element Separator	The Component Data Element Separator: the symbol used as a component data element separator (delimiter). Default: colon (:). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 010).
Decimal Symbol	Decimal mark: the symbol used to indicate a decimal point. Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 030).
Element Separator	The Data Element Separator: the symbol used as a separator between data elements (delimiter). Default: plus sign (+). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 020).
Interchange Agreement Identification	An optional name or code indicating the type of agreement under which the interchange takes place (UNB 100 0032).
Processing Priority Code	Optional: a single-character code determined by the sender requesting processing priority for the interchange (UNB 080-0029). Note: The Interchange Agreement must state whether the field is to be used. If it is used, a list of codes and meanings must be provided.
Interchange Recipient Identifier	(Required) The receiver's name or ID code, as specified in the Interchange Agreement (UNB 030 0010).

Table 34 Message Profile, Interchange Control Section (UN/EDIFACT 4B): Fields (Continued)

Name	Description
Interchange Recipient Internal Identifier	The identification specified by the recipient of interchange (for example, a division or a computer system). If agreed, this is included in response interchanges by the sender, to facilitate internal routing (UNB 030 0014). Up to 35 characters.
Interchange Recipient Internal Sub-Identifier	An optional sub-level of the receiver's internal ID (UNB 030 0046). Up to 35 characters.
Interchange Recipient Identification Qualifier	A qualifier referring to the receiver's identification code. Up to 4 characters (UNB 030 0007).
Recipient Reference Password	The reference or password required for the sender to access the recipient's system. Up to 14 characters (UNB 060 0022).
Recipient Reference Qualifier	An optional qualifier for the recipient's reference or password. Up to 4 characters (UNB 060 0025).
Interchange Sender Identifier	The sender's name or ID code, as specified in the interchange Agreement (UNB 020 0004).
Interchange Sender Internal Identifier	An ID (it could be used to indicate a division, branch or computer system/process) specified by the sender of the interchange. This ID can be used by the recipient in response interchanges, for the purposes of internal routing (UNB 020 0008).
Interchange Sender Internal Sub-Identifier	An optional sub-level of the sender's internal ID (UNB 020 0042). Up to 35 characters.
Interchange Sender Identification Qualifier	A qualifier for the Interchange Sender ID name or code. A qualifier code may refer to an organization identification, as in ISO 6523. Up to 4 characters (UNB 020 0007).
Release Character	The symbol used as a release character. Default: question mark (?). The release character, immediately preceding one of the other separators, restores its normal meaning. For example, 10?+10=20 means 10+10=20. Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 040).
Repetition Separator	The symbol used as a repetition separator (delimiter). Default: asterisk (*). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 050).
Segment Terminator	The symbol used to indicate the end of a segment (delimiter). Default: apostrophe ('). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 060).
Interchange Syntax Identifier	The syntax level used (UNB 010 0001): UNOA for the basic level A UNOB for level B

Table 34 Message Profile, Interchange Control Section (UN/EDIFACT 4B): Fields (Continued)

Name	Description
Interchange Syntax Version	The EDIFACT version used at the interchange level (UNB 010 0002). e*Xchange supports versions 3 and 4. For the current version, ISO 9735-1, use 4. Use 3 for the 1988 version amended and reprinted in 1990 plus Amendment 1 of 1992.
Test Indicator	An optional single-digit numeric code (1, 2, 3, or 4) indicating that this is a test (UNB 110 0035).

Table 35 Message Profile, Functional Group Section (UN/EDIFACT 4B): Fields

Name	Description
Application Password	Optional: The reference or password required for the sender to access the recipient's division, department, or sectional application system/process (additional to the recipient's reference password at the interchange level, which is required). Up to 14 characters (UNG 080 0058).
Include Functional Group	Only applicable to outbound messages sent by Interactive transfer mode. This field indicates whether the trading partner requires group information (UNG/UNE segments) in the message.
Application Receiver Identification Code	Required: An additional ID code (for example, of a division, branch, or computer system or process), specified by the recipient to facilitate internal routing. Up to 35 characters (UNG 030 0044).
Application Receiver Identification Qualifier	Optional: A qualifier to the recipient's ID code. 4 characters (UNG 030 0007).
Application Sender Identification Code	Required: An additional ID code (for example, of a division, branch, or computer system or process), specified by the sender to facilitate internal routing. Up to 35 characters (UNG 020 0040).
Application Sender Identification Qualifier	An optional qualifier to the sender's ID code. 4 characters (UNG 020 0007).

Table 36 Message Profile, Message Envelope Section (UN/EDIFACT 4B): Fields

Name	Description
Association Assigned Code	Optional: a code that further identifies the message. Assigned by the association responsible for the design and maintenance of the message type concerned. Up to 6 characters (UNH 020 0057).
Code List Directory Version Number	Optional: The version number of the service code list directory (UNH 020 0110).
Common Access Reference	Optional: A reference serving as a key to relate all subsequent transfers of data to the same business case or file. Up to 35 characters (UNH 030 0068).
Controlling Agency	The code for the controlling agency (UNH 020 0051). For UN/EDIFACT, this value is always UN.
Message Type Release Number	Required: The release number within the current message version number. 1 to 3 characters (UNH 020 0054).
Message Type Identifier	Required: Message Type: A code identifying a type of message and assigned by its controlling agency. Up to 6 characters (UNH 020 0065).
Message Type Version	Required: The version number for the message type. Up to 3 characters (UNH 020 0052).
Message Implementation Guideline Controlling Agency	Optional: the controlling agency for the implementation guideline. For UN/EDIFACT, this value is always UN (UNH 060 0051).
Message Implementation Guideline Identifier	The coded identification of the message implementation guideline, assigned by its controlling agency. (UNH 060 0121).
Message Implementation Guideline Release Number	The release number within the message implementation guideline version number (UNH 060 0124).
Message Implementation Guideline Version	Version number of the message implementation guideline (UNH 060 0122).
Message Scenario Controlling Agency	The code identifying the controlling agency for the message scenario (UNH 070 0051).
Message Scenario Identifier	The code identifying the scenario (UNH 070 0127).
Message Scenario Release Number	The release number within the scenario version number (UNH 070 0130).
Message Scenario Version	Version number of a scenario (UNH 070 0128).
Message Subset Controlling Agency	The code identifying the controlling agency for the message subset (UNH 050 0051).
Message Subset Identifier	Coded identification of a message subset, assigned by its controlling agency (UNH 050 0115).

Table 36 Message Profile, Message Envelope Section (UN/EDIFACT 4B): Fields (Continued)

Name	Description
Message Subset Release Number	The release number within the message subset version number (UNH 050 0118).
Message Subset Version	The version number of the message subset (UNH 050 0116).
Message Transfer Indicator	Optional: First and Last Transfer: An indication used for the first and last message in a sequence of messages related to the same topic. One character (UNH 040 0073).
Message Type Sub-Function Identification	The code identifying a sub-function of a message type (UNH 020 0113).

7.2.3 Version 4 Interactive

This section includes field descriptions for UN/EDIFACT version 4 Interactive, for the following Message Profile setup sections:

- General section—[Table 37 on page 132](#)
- Interchange Control section—[Table 38 on page 133](#)
- Message Envelope section—[Table 39 on page 135](#)

Table 37 Message Profile, General Section (UN/EDIFACT 4I): Fields

Name	Description
eBusiness Protocol	Displayed; the name of the protocol as selected earlier.
Version	The eBusiness protocol version that you selected earlier.
Direction	The direction for the message profile: Inbound or Outbound.
Logical Name	If you specified a logical name at the B2B protocol level, it is displayed.
Functional Group Envelope Custom Validation	If you have a custom Validation for the functional envelope layer, type the name.
Interchange Envelope Custom Validation	If you have a custom Validation for the interchange envelope layer, type the name.
Message Envelope Custom Validation	If you have a custom Validation for the message envelope (for Interactive, this is UIH) layer, type the name.
Name	A label for the message profile. It should be descriptive, and unique for the trading partner.
Transfer Mode	The way in which the eBusiness messages are transmitted to, or received from, the trading partner. Choose Interactive.
Validation Collaboration	The name of the Collaboration that verifies and translates message profiles of this type.

Table 37 Message Profile, General Section (UN/EDIFACT 4I): Fields (Continued)

Name	Description
Message Profile Status	<p>The status of the message profile. Choose one of the following values.</p> <p>Active—The message profile is currently active, and can be used.</p> <p>Inactive—The message profile is not active, and cannot be used.</p> <p>Default: Active.</p> <p>Note: This is only available when adding a message profile. When editing, you can change the status on the Message Profile - Viewing page.</p>

Table 38 Message Profile, Interchange Control Section (UN/EDIFACT 4I): Fields

Name	Description
Character Encoding	<p>(Optional) The identification for the character encoding used in the interchange, as specified in the trading agreement (alphanumeric, up to three characters) (UIB 010 0133).</p> <p>Acceptable values: any three-character code as defined in the trading agreement.</p> <p>If you do not specify a value, e*Xchange assumes the default encoding technique defined for the syntax version being used:</p> <p>1—ASCII 7-bit code.</p> <p>2—ASCII 8-bit code.</p> <p>3—Code page 500 (EBCDIC Multinational No. 5) encoding schema for the repertoire as defined by the code page.</p> <p>4—Code page 850 (IBM PC Multinational) encoding schema for the repertoire as defined by the code page.</p>
Service Code List Directory Version Number	The version number of the service code list directory (UIB 010 0080).
Component Element Separator	<p>The Component Data Element Separator: the symbol used as a component data element separator (delimiter). Default: colon (:).</p> <p>Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 010).</p>
Decimal Symbol	<p>Decimal mark: the symbol used to indicate a decimal point.</p> <p>Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 030).</p>
Dialogue Controlling Agency	The code identifying the controlling agency for the dialogue (UIB 050 0051).
Dialogue Identification	The code identifying the dialogue (UIB 050 0311).
Dialogue Release	The release number of the dialogue (UIB 050 0344).
Dialogue Version	The version number of the dialogue (UIB 050 0342).
Element Separator	<p>The Data Element Separator: the symbol used as a separator between data elements (delimiter). Default: plus sign (+).</p> <p>Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 020).</p>
Initiator Controlling Agency	The code identifying the controlling agency for the dialogue reference (UIB 020 0051).

Table 38 Message Profile, Interchange Control Section (UN/EDIFACT 4I): Fields (Continued)

Name	Description
Initiator Reference Identifier	The Initiator Control Reference: a reference assigned by the dialogue initiator (UIB 020 0300).
Interchange Recipient Identifier	The receiver's name or ID code, as specified in the Interchange Agreement (UIB 070-0010).
Interchange Recipient Internal Identifier	The identification specified by the recipient of interchange (for example, a division or a computer system). If agreed, this is included in response interchanges by the sender, to facilitate internal routing Up to 35 characters (UIB 070 0014).
Interchange Recipient Internal Sub-Identifier	An optional sub-level of the receiver's internal ID. Up to 35 characters (UIB 070 0046).
Interchange Recipient Identification Qualifier	A qualifier for the recipient's reference or password. Up to 4 characters (UIB 070 0007).
Release Character	The symbol used as a release character. Default: question mark (?). The release character, immediately preceding one of the other separators, restores its normal meaning. For example, 10?+10=20 means 10+10=20. Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 040).
Repetition Separator	The symbol used as a repetition separator (delimiter). Default: asterisk (*). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 050).
Response Control Reference Number	The reference number assigned by the dialogue responder (UIB 020 0304).
Scenario Controlling Agency	The code identifying the controlling agency for the message scenario (UIB 040 0051).
Scenario Identifier	The code identifying the scenario (UIB 040 0127).
Scenario Release	The release number within the scenario version number (UIB 040 0130).
Scenario Version	Version number of a scenario (UIB 040 0128).
Segment Terminator	The symbol used to indicate the end of a segment (delimiter). Default: apostrophe ('). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment (UNA 060).
Interchange Sender Identifier	The sender's name or ID code, as specified in the interchange Agreement (UIB 060 0004).
Interchange Sender Internal Identifier	An ID (it could be used to indicate a division, branch or computer system/process) specified by the sender of the interchange. This ID can be used by the recipient in response interchanges, for the purposes of internal routing (UIB 060 0008).
Interchange Sender Internal Sub-Identifier	An optional sub-level of the sender's internal ID. Up to 35 characters (UIB 060 0042).

Table 38 Message Profile, Interchange Control Section (UN/EDIFACT 4I): Fields (Continued)

Name	Description
Interchange Sender Identification Qualifier	The qualifier for the Interchange Sender ID name or code. A qualifier code may refer to an organization identification, as in ISO 6523 (UIB 060-0007).
Interchange Syntax Identifier	The syntax level used (UIB 010 0001): UNOA for the basic level A UNOB for level B
Interchange Syntax Version	The EDIFACT version used at the interchange level (UIB 010 0002). e*Xchange supports versions 3 and 4. For the current version, ISO 9735-1, use 4. Use 3 for the 1988 version amended and reprinted in 1990 plus Amendment 1 of 1992.
Test Indicator	An optional single-digit numeric code (1, 2, 3, or 4) indicating that this is a test (UIB 100 0035).
Transaction Control Agency	The code identifying the controlling agency for the transaction reference (UIB 030 0051).
Transaction Control Reference Number	A reference number assigned by the transaction initiator (UIB 030 0306).

Table 39 Message Profile, Message Envelope Section (UN/EDIFACT 4I): Fields

Name	Description
Association Assigned Code	Optional: a code that further identifies the message. Assigned by the association responsible for the design and maintenance of the message type concerned. Up to 6 characters (UIH 010 0057).
Controlling Agency	The code for the controlling agency (UIH 010 0051). For UN/EDIFACT, this value is always UN.
Initiator Controlling Agency	The code identifying the controlling agency for the dialogue initiator (UIH 030 0051).
Initiator Controlling Reference Number	The code assigned by the dialogue initiator (UIH 030 0300).
Initiator Reference Identifier	The organization code or name assigned by the party that initiated the transaction or dialogue (UIH 030 0303).
Message Type Release Number	Required: The release number within the current message version number (UIH 010 0054).
Message Type Identifier	Required: Message Type: A code identifying a type of message and assigned by its controlling agency. Up to 6 characters (UIH 010 0065).
Message Type Version	Required: The version number for the message type. Up to 3 characters (UIH 010 0052).
Message Type Sub-Function Identification	The code identifying a sub-function of a message type (UIH 010 0113).

Table 39 Message Profile, Message Envelope Section (UN/EDIFACT 4I): Fields (Continued)

Name	Description
Message Classification Type	A flag to specify the message type for the message: B for batch, I for interactive. Certain types of UN/EDIFACT messages are not batched. Since you are using version 4 Interactive, this field defaults to I. Do not change it.
Sender Sequence Number	Identification of the sequence number of the message or package within the sender interchange (UIH 040 0320).
Test Indicator	An optional single-digit numeric code (1, 2, 3, or 4) indicating that this is a test (UIH 060 0035).
Transfer Position	An indication of the position of a transfer UIH 040 0323).

Web Interface: Profile Setup for RosettaNet

This chapter provides information on setting up RosettaNet versions 1.1 and 2.0 transactions in the e*Xchange Partner Manager, at the Message Profile level.

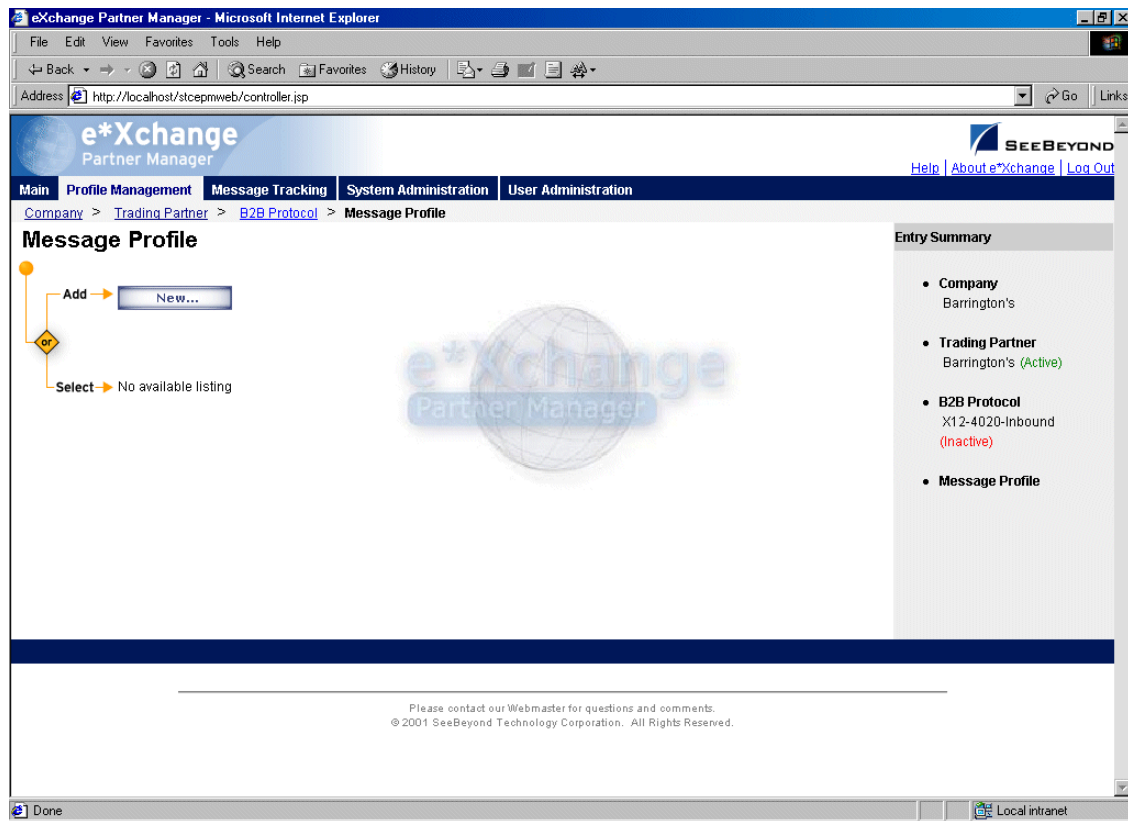
The Company, Trading Partner, and B2B Protocol (inbound and outbound) levels must be set up first. For information on setting up these components, refer to [“Web Interface: Profile Management” on page 71](#).

8.1 Setting Up RosettaNet Message Profile Information

Once you have set up outbound and inbound B2B protocol information for a trading partner, the next step is to set up message profiles for each message that you will be sending to the trading partner (for the outbound B2B protocol) or receiving from the trading partner (for the inbound B2B protocol).

From the **B2B Protocol** page, select a B2B protocol and click **Continue: Message Profile** to access the **Message Profile** page (see Figure 81).

Figure 81 Message Profile Page



From the **Message Profile** page you can complete the following activities:

- Add a message profile for the selected B2B protocol (see [“To add a message profile” on page 139](#))
- Select a message profile: choose from the drop-down list. The message profile **General** properties are displayed on the right side of the page. Click on links for additional groups of properties above the properties display to view those additional properties (specific property groups vary according to the ebusiness protocol).
- Edit the selected message profile; first select the section that you want to edit, and then click the **Edit** button to access the **Message Profile - editing** page (see [“To edit a message profile” on page 142](#))
- Create a new message profile based on the selected one (see [“To copy a message profile” on page 143](#))
- Delete the selected message profile (see [“To delete a message profile” on page 144](#))
- Activate or deactivate the selected message profile (see [“To deactivate \(or reactivate\) a message profile” on page 144](#))
- Set or change security for the selected message profile (see [“Web Interface: Security” on page 97](#))

To add a message profile

- 1 From the **Message Profile** page, click the **New** button to access the **Message Profile - adding** page (see Figure 82).

Figure 82 Message Profile - adding (General section) (RosettaNet)

The screenshot displays the 'e*Exchange Partner Manager' web application in a Microsoft Internet Explorer browser. The address bar shows the URL 'http://localhost/stcepmweb/controller.jsp'. The application has a navigation menu with tabs: Main, Profile Management, Message Tracking, System Administration, and User Administration. The 'Profile Management' tab is active, and the breadcrumb trail is 'Company > Trading Partner > B2B Protocol > Message Profile'. The main content area is titled 'Message Profile - adding' and features a 'General' section with the following fields:

eBusiness Protocol	ROS
Version	1.1
Direction	Outbound
Logical Name	temp
Name	*
Transfer Mode	* Interactive
Validation Collaboration	
Message Profile Status	* Active
Non-Repudiation	* N

At the bottom of the form are 'Cancel' and 'Continue' buttons. To the right, an 'Entry Summary' sidebar shows the following hierarchy:

- Company: Barrington's
- Trading Partner: Barrington's (Active)
- B2B Protocol: RosettaNet-1.1-Outbound (Active)
- Message Profile

The footer of the page contains the text: 'Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved.' and a 'Local intranet' icon.

- 2 Enter or select values for the General section.

For more information, refer to [Table 40 on page 145](#) for RNIF 1.1 or [Table 43 on page 148](#) for RNIF 2.0.

Note: For RosettaNet, if you are setting up a profile for a broadcast message not expecting any type of response, be sure to select **Asynchronous** in the **Transfer Mode** field (General properties).

- 3 Click **Continue** to access the Preamble section for RNIF 1.1 (see Figure 83) or the Delivery Header section for RNIF 2.0 (see Figure 84).

Figure 83 Message Profile - adding (Preamble section) (RNIF 1.1)

The screenshot displays the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser's address bar shows the URL `http://localhost/stcepmweb/controller.jsp`. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The current page is "Message Profile - adding".

The main content area contains a form titled "Preamble" with the following fields:

Preamble	
Global Administering Authority Code	RosettaNet
Global Usage Code	Test
RNIF Version Identifier	1.1

Below the form are three buttons: "Cancel", "Go Back", and "Continue".

On the right side, there is an "Entry Summary" section with the following items:

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
RosettaNet-1.1-Outbound (Active)
- **Message Profile**

At the bottom of the page, there is a footer with the text: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved."

Figure 84 Message Profile - adding (Delivery Header section) (RNIF 2.0)

The screenshot displays the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "Message Profile - adding".

The "Delivery Header" section contains two input fields:

From Global Partner Business Identification *	123
To Global Partner Business Identification *	321

Below the fields are three buttons: "Cancel", "Go Back", and "Continue".

The "Entry Summary" sidebar on the right lists the configuration path:

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
RosettaNet-2.0-Outbound (Active)
- **Message Profile**

At the bottom of the page, there is a footer with the text: "Please contact our Webmaster for questions and comments. © 2001 SeeBeyond Technology Corporation. All Rights Reserved."

- 4 Enter or select values for the Preamble section (RNIF 1.1) or the Delivery Header section (RNIF 2.0).

For more information, refer to [Table 41 on page 146](#) for RNIF 1.1 or [Table 44 on page 149](#) for RNIF 2.0.

- 5 Click **Continue** to access the Service Header section (see Figure 85).

Figure 85 Message Profile - adding (Service Header section) (RNIF 2.0)

The screenshot displays the e*Exchange Partner Manager web application in a Microsoft Internet Explorer browser. The address bar shows the URL <http://localhost:8080/steppmweb/controller.jsp>. The application's navigation menu includes 'Main', 'Profile Management', 'Message Tracking', 'System Administration', and 'User Administration'. The current page is titled 'Message Profile - adding' and is part of a breadcrumb trail: 'Company > Trading Partner > B2B Protocol > Message Profile'. The main content area features a 'Service Header' form with the following fields: 'Activity Identifier' (required), 'From Global Partner Role Classification' (required), 'From Global Business Service Code' (required), 'Global Business Action/Signal Code' (required), 'Global Business Action/Signal Version Identifier' (required), 'Global Process Code (PIP)', 'PIP Version Identifier', 'To Global Partner Role Classification' (required), 'To Global Business Service Code' (required), and 'Usage Code' (required). The 'Usage Code' field is populated with the text 'Test'. To the right of the form is an 'Entry Summary' panel that provides a overview of the configuration: Company (Barrington's), Trading Partner (Barrington's (Active)), B2B Protocol (RosettaNet-2.0-Outbound (Active)), and Message Profile. At the bottom of the form are three buttons: 'Cancel', 'Go Back', and 'Continue'. The browser's status bar at the bottom indicates 'Done' and 'Local intranet'.

- 6 Enter or select values for the Service Header section.
or more information, refer to [Table 42 on page 146](#) for RNIF 1.1 or [Table 45 on page 149](#) for RNIF 2.0.
- 7 Click **Continue**.
- 8 Define return messages.
- 9 Click **Apply** to save the profile and go to the **Message Profile** page.

To edit a message profile

- 1 From the **Message Profile** page, select the message profile from the drop-down list.
- 2 Click the **Edit** button to access the **Message Profile - editing** page (see Figure 86).

Figure 86 Message Profile - editing (General) (RosettaNet)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "Message Profile - editing".

The "General" tab is selected, showing a form with the following fields:

eBusiness Protocol	X12
IC Version	4020
FG Version	4020
Direction	Outbound
Logical Name	
Include IC/FG Envelope	<input checked="" type="checkbox"/>
Name	X12-4020
Transfer Mode	Batch
Validation Collaboration	
Batch Last Send Time[MM/DD/YYYY hh:mm:ss]	01/01/1970 12:01:00
Batch Repeat Time	
Batch Repeat Granularity[H-hour,M-minute,D-day]	
Batch Time[hh:mm:ss]	

At the bottom of the form are "Cancel" and "Apply" buttons.

On the right side, the "Entry Summary" section lists the following information:

- **Company**
Barrington's
- **Trading Partner**
Barrington's (Active)
- **B2B Protocol**
X12-4020-Outbound (Active)
- **Message Profile**
X12-4020 (Active)

The browser status bar shows http://localhost/stcepmweb/sys_admin_menu.jsp and "Local intranet".

3 Change the values as needed.

For more information, refer to the section for the appropriate RosettaNet version, in [“RosettaNet Message Profile Parameter Values” on page 145](#).

4 Click **Apply** to return to the **Message Profile** page.

To copy a message profile

- 1** On the **Message Profile** page, select the message profile that you want to copy.
- 2** Click the **Copy** button.

The **Message Profile - copying** page appears (see Figure 87).

Figure 87 Message Profile - copying (General) (RosettaNet)

The screenshot shows the e*Exchange Partner Manager web interface in Microsoft Internet Explorer. The browser address bar shows <http://localhost/stcepmweb/controller.jsp>. The page title is "e*Exchange Partner Manager". The navigation menu includes "Main", "Profile Management", "Message Tracking", "System Administration", and "User Administration". The breadcrumb trail is "Company > Trading Partner > B2B Protocol > Message Profile". The main heading is "Message Profile - copying".

The "General" tab is selected, showing the following fields:

eBusiness Protocol	X12
IC Version	4020
FG Version	4020
Direction	Outbound
Logical Name	
Include IC/FG Envelope	<input checked="" type="checkbox"/>
Name	X12-4020
Transfer Mode	Batch
Validation Collaboration	
Message Profile Status	Active
Batch Last Send Time[MM/DD/YYYY hh:mm:ss]	01/01/1970 12:01:00
Batch Repeat Time	
Batch Repeat Granularity[H-hour,M-minute,D-day]	
Batch Time[hh:mm:ss]	

The "Entry Summary" on the right lists the following:

- Company: Barrington's
- Trading Partner: Barrington's (Active)
- B2B Protocol: X12-4020-Outbound (Active)
- Message Profile: X12-4020 (Active)

- 3 Change the message profile name, and any other values as needed.

For more information, refer to the section for the appropriate RosettaNet version, in [“RosettaNet Message Profile Parameter Values” on page 145](#).

- 4 Click **Apply**.

You are returned to the **B2B Protocol** page. The new message profile is now on the drop-down list.

To delete a message profile



- 1 On the **Message Profile** page, select the message profile from the drop-down list.
 - 2 Click the **Delete** button.
- A warning message appears asking if you are sure you want to delete.
- 3 To delete the profile, click **OK**.

The message profile is deleted.

To deactivate (or reactivate) a message profile

- 1 On the **Message Profile** page, select the message profile from the drop-down list.
- The message profile properties are displayed on the right side of the page.

- 2 In the **Message Profile Status** field, toggle the Active/Inactive graphic to change the status. Values are as follows:

- ♦  Message profile is active: click to deactivate
- ♦  Message profile is inactive: click to reactivate.

To set up security

- From the **Message Profile** page, click the **Security** button to access the **Security Management** page.

For detailed instructions on setting up security, refer to [“Web Interface: Security” on page 97](#).

8.2 RosettaNet Message Profile Parameter Values

This section lists field descriptions for the RosettaNet values required for setting up a message profile.

Field descriptions are listed separately for each version:

- RNIF 1.1—See [“RNIF1.1” on page 145](#)
- RNIF 2.0—See [“RNIF 2.0” on page 148](#)

8.2.1 RNIF1.1

This section includes field descriptions for RosettaNet version 1.1 messages, for the following Message Profile setup sections:

- General section—[Table 40 on page 145](#)
- Preamble section—[Table 41 on page 146](#)
- Service Header section—[Table 42 on page 146](#)

Table 40 Message Profile, General Section (RNIF 1.1): Fields

Name	Description
eBusiness Protocol	The name of the protocol selected at the B2B protocol level (ROS) is displayed.
Version	The eBusiness protocol version selected at the B2B protocol level (1.1) is displayed.
Direction	The direction for the message profile: Inbound or Outbound.
Logical Name	If you specified a logical name at the B2B protocol level, it is displayed.
Name	A label for the message profile. It should be descriptive, and unique for the trading partner.

Table 40 Message Profile, General Section (RNIF 1.1): Fields (Continued)

Name	Description
Transfer Mode	The way in which the eBusiness messages are transmitted to, or received from, the trading partner. Interactive is the only valid transfer mode for RosettaNet.
Validation Collaboration	The name of the Collaboration that verifies message profiles of this type.
Message Profile Status	The status of the message profile. Choose one of the following values. Active—The message profile is currently active, and can be used. Inactive—The message profile is not active, and cannot be used. Default: Active. Note: This is only available when adding a message profile. When editing, you can change the status on the Message Profile - Viewing page.
Non-Repudiation (required)	Indicates whether non-repudiation is required for the message: Y or N. The default is N.

Table 41 Message Profile, Preamble Section (RNIF 1.1): Fields

Name	Description
Global Usage Code (Required)	There are two acceptable values: Test or Production.
Global Administering Authority Code (Required)	The Global Administering Authority Code is RosettaNet.
RNIF Version Identifier	The RNIF version number. Select 1.1.

Table 42 Message Profile, Service Header Section (RNIF 1.1): Fields

Name	Description
Global From Business Identifier	The sender's unique business identifier. RosettaNet identifies this as the DUNS number; e*Xchange does not enforce the use of a DUNS number.
Global To Business Identifier	The receiver's unique business identifier. RosettaNet identifies this as the DUNS number; e*Xchange does not enforce the use of a DUNS number.
From Global Business Service Code	The sender's Global Business Service Code, which is the RosettaNet code for the business service: for example, Product Information Distributor Service, Seller Service, Product Supplier Service, or Buyer Service. Click on the Attributes List icon to select from a list of valid values.
From Global Partner Classification Code (Required)	The RosettaNet classification code identifying the sender's function in the supply chain: for example, Carrier, Distributor, Manufacturer, or Retailer. Click on the Attributes List icon to select from a list of valid values.

Table 42 Message Profile, Service Header Section (RNIF 1.1): Fields (Continued)

Name	Description
From Global Partner Role Classification Code (Required)	The sender's partner role classification code. This is the code for the partner role that uses product information to create or update enterprise systems and online promotion systems such as electronic catalog systems. Examples of valid codes are Buyer, Seller, Customer Manager, Supplier, Shipment Information User. Click on the Attributes List icon to select from a list of valid values.
Global Business Action/Signal Code (Required)	If the message is a business action: the Global Business Action Code, such as Return Product Request Action, Financing Request Action, or Remittance Advice Notification Action. If the message is a signal: the Global Business Signal Code, such as General Exception or Receipt Acknowledge. Click on the Attributes List icon to select from a list of valid values.
Global Document Function Code (Required)	The code that indicates the type of document: either Request or Response. For example, for an OA1, Failure Notification, it should be set to Request. Click on the Attributes List icon to select from a list of valid values.
Global Process Code	The plain language name for the RosettaNet code assigned to the process; for example, Distribute New Product Information, Query Price and Availability. Click on the Attributes List icon to select from a list of valid values.
Global Process Ind Code	The RosettaNet code assigned to the process; for example, 2A1, 3A2. Click on the Attributes List icon to select from a list of valid values.
Global Tran Code	The RosettaNet Global Transaction Code. Examples: Process Return Product Request, Confirm Financing, Create Remittance Advice. Click on the Attributes List icon to select from a list of valid values.
Signature INST Identifier text	Not used.
To Global Business Service Code	The receiver's Global Business Service Code, which is the RosettaNet code for the business service: for example, Product Information Distributor Service, Seller Service, Product Supplier Service, or Buyer Service. Click on the Attributes List icon to select from a list of valid values.
To Global Partner Classification Code (Required)	The RosettaNet classification code identifying the receiver's function in the supply chain: for example, Carrier, Distributor, Manufacturer, or Retailer. Click on the Attributes List icon to select from a list of valid values.
To Global Partner Role Classification Code (Required)	The receiver's partner role classification code. This is the code for the partner role that uses product information to create or update enterprise systems and online promotion systems such as electronic catalog systems. Examples of valid codes are Buyer, Seller, Customer Manager, Supplier, Shipment Information User. Click on the Attributes List icon to select from a list of valid values.
Version Identifier (Required)	The PIP version number: for example, 1.0 or 2.0.

8.2.2 RNIF 2.0

This section includes field descriptions for RosettaNet version 2.0 messages, for the following Message Profile setup sections:

- General section—[Table 43 on page 148](#)
- Delivery Header section—[Table 44 on page 149](#)
- Service Header section—[Table 45 on page 149](#)

Table 43 Message Profile, General Section (RNIF 2.0): Fields

Name	Description
eBusiness Protocol	The name of the protocol selected at the B2B protocol level (ROS) is displayed.
Version	The eBusiness protocol version selected at the B2B protocol level (2.0) is displayed.
Direction	The direction for the message profile: Inbound or Outbound.
Logical Name	If you specified a logical name at the B2B protocol level, it is displayed.
Debug Mode (required)	Select Y if you want to include extra information in the RosettaNet message headers, to help track the type of transaction flowing between e*Xchange Partner Manager and the trading partner. Default: N . Note: It is best to use debug mode only for initial setup and testing. It can cause problems if used during production. For more information, refer to Debug Mode in RNIF 2.0.
Name	A label for the message profile. It should be descriptive, and unique for the trading partner.
Transfer Mode (required)	The way in which the eBusiness messages are transmitted to, or received from, the trading partner. Interactive is the only valid transfer mode for RosettaNet.
Validation Collaboration	The name of the Collaboration that verifies message profiles of this type.
Message Type (HTTP/HTTPS only) (required)	A flag for the message type: SYNC for synchronous or ASYNC for asynchronous. Inbound—Indicates whether the incoming message is synchronous or asynchronous. Outbound—Indicates whether the message should be sent out as synchronous or asynchronous. Note: When setting up a broadcast message that is not expecting any response, either receipt acknowledgment or business message (for example, a catalog update), if you are using HTTP, make sure you select Asynchronous. If you select Synchronous, the trading partner returns an empty string, which causes errors. This is because, when sending a Synchronous message, the HTTP e*Way expects the post accept response to include a RosettaNet message. When the message type is Asynchronous, the HTTP e*Way expects only the post accepted response, which it gets from the receiving Web server.

Table 43 Message Profile, General Section (RNIF 2.0): Fields (Continued)

Name	Description
Message Compress (required)	Indicates whether the messages will be compressed before they are stored in the database. Default: N. Note: Compressed messages cannot be viewed in Message Tracking.
Status (required)	The status of the message profile. Choose one of the following values. Active—The message profile is currently active, and can be used. Inactive—The message profile is not active, and cannot be used. Default: Active. Note: This is only available when adding a message profile. When editing, you can change the status on the Message Profile - Viewing page.
Encryption Type (required)	The type of encryption to be used in the message (the default is no encryption). Enter one of the following values: 0—no encryption 1—encryption of Service Content and any attachments 2—encryption of Service Header, Service Content, and any attachments The preamble and delivery header are never encrypted.
Non-Repudiation (required)	Indicates whether non-repudiation is required for the message: Y or N. The default is N.
Signature Required (required)	Indicates whether a digital signature is required: Y or N. The default is N.

Table 44 Message Profile, Delivery Header Section (RNIF 2.0): Fields

Name	Description
From Global Partner Business Identification	The sender's unique business identifier. RosettaNet identifies this as the DUNS number. e*Xchange does not enforce the use of a DUNS number.
From Global Partner Business Identification	The receiver's unique business identifier. RosettaNet identifies this as the DUNS number; e*Xchange does not enforce the use of a DUNS number.

Table 45 Message Profile, Service Header Section (RNIF 2.0): Fields

Name	Description
Activity Identifier (required)	The RosettaNet Activity Control Business Activity identifier. This value is used as part of the unique ID for storing and tracking RNIF 2.0 messages in e*Xchange.
From Global Partner Role Classification (required)	The RosettaNet classification code identifying the sender's function in the supply chain: for example, Carrier, Distributor, Manufacturer, or Retailer. Click on the Attributes List icon to select from a list of valid values.
From Global Business Service Code (required)	The sender's Global Business Service Code, which is the RosettaNet code for the business service: for example, Product Information Distributor Service, Seller Service, Product Supplier Service, or Buyer Service. Click on the Attributes List icon to select from a list of valid values.

Table 45 Message Profile, Service Header Section (RNIF 2.0): Fields (Continued)

Name	Description
Global Business Action/Signal Code (required)	If the message is a business action: the Global Business Action Code; for example, Return Product Request Action, Financing Request Action, or Remittance Advice Notification Action. If the message is a signal: the Global Business Signal Code; for example, Receipt Acknowledgment. Click on the Attributes List icon to select from a list of valid values.
Global Business Action/Signal Version Identifier (required)	The RosettaNet version number of the message guideline for the business action or signal.
Global Process Code (PIP)	The alphanumeric code for the PIP; for example, 3A2. Click on the Attributes List icon to select from a list of valid values.
PIP Version Identifier	The version identifier for the PIP.
To Global Partner Role Classification (required)	The receiver's partner role classification code. This is the code for the partner role that uses product information to create or update enterprise systems and online promotion systems such as electronic catalog systems. Examples of valid codes are Buyer, Seller, Customer Manager, Supplier, Shipment Information User. Click on the Attributes List icon to select from a list of valid values.
To Global Business Service Code (required)	The receiver's Global Business Service Code, which is the RosettaNet code for the business service: for example, Product Information Distributor Service, Seller Service, Product Supplier Service, or Buyer Service. Click on the Attributes List icon to select from a list of valid values.
Usage Code (required)	The Global Usage Code. There are two acceptable vales: Test or Production.

Web Interface: Message Tracking

The e*Xchange Partner Manager Web interface includes Message Tracking features so that you can:

- View any messages that have been processed by e*Xchange
- Use the various search fields to narrow down your search before viewing message details
- For any message, view an error list, extended attributes, or actual text of the original message, enveloped message, or acknowledgment message.

Note: In the Web interface, an asterisk (*) on a field indicates that it is a required field.

9.1 Message Tracking Features

The Message Tracking feature allows you to view any messages that have been processed by e*Xchange, including any errors that might be associated with a message. This useful tool enables you to pinpoint the source of an error so that it can be resolved.

You can use the various search fields to narrow down your search before viewing message details. For example, you might want to view all inbound messages from a specific trading partner during a certain date range, or all outbound messages for the day that used the X12 protocol.

For any message, you can view an error list, extended attributes, or the actual text of messages.

This tool can be used for troubleshooting message errors and monitoring message flow.

Searching for messages is a three-step process:

- 1 Enter general search criteria to view a list of envelope profiles that meet the criteria.
- 2 View the list, enter advanced search criteria if needed, and highlight the desired envelope profiles, to view a list of messages that meet the criteria.
- 3 View the message information as needed.

This section includes the following step-by-step instructions:

- Entering general search criteria: see [“Entering General Search Criteria” on page 152](#)

- Choosing a range of envelope profiles for which you want to view messages: see [“Choosing the Messages to View” on page 153](#)
- Viewing message details: see [“Viewing the Message Details” on page 154](#)

9.1.1 Entering General Search Criteria

The first step is to enter general search criteria that e*Xchange will use to provide you with a list of envelope profiles.

To enter general search criteria

- 1 From the Main page, click **Message Tracking**.

The **TP Profile Selection** page appears (see Figure 88).

Figure 88 TP Profile Selection

e*Xchange Partner Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://localhost/stcepmweb/controller.jsp?handler=MsgSearch&event=0

e*Xchange Partner Manager

SEE BEYOND

Help | About e*Xchange | Log Out

Main | Profile Management | Message Tracking | System Administration | User Administrator

TP Profile Selection > Message Profile Selection > Message Details

TP Profile Selection

Select TP Profile Criteria

* = Required Fields

Company Profile: * []

Trading Partner Profile: * []

eBusiness Protocol: * []

TA1/Message Profile: Message Profile

Direction: * []

B2B Protocol Version: []

Transfer Mode: []

Message Profile Version: []

Message Profile Status: Active []

Message Profile Selection >>

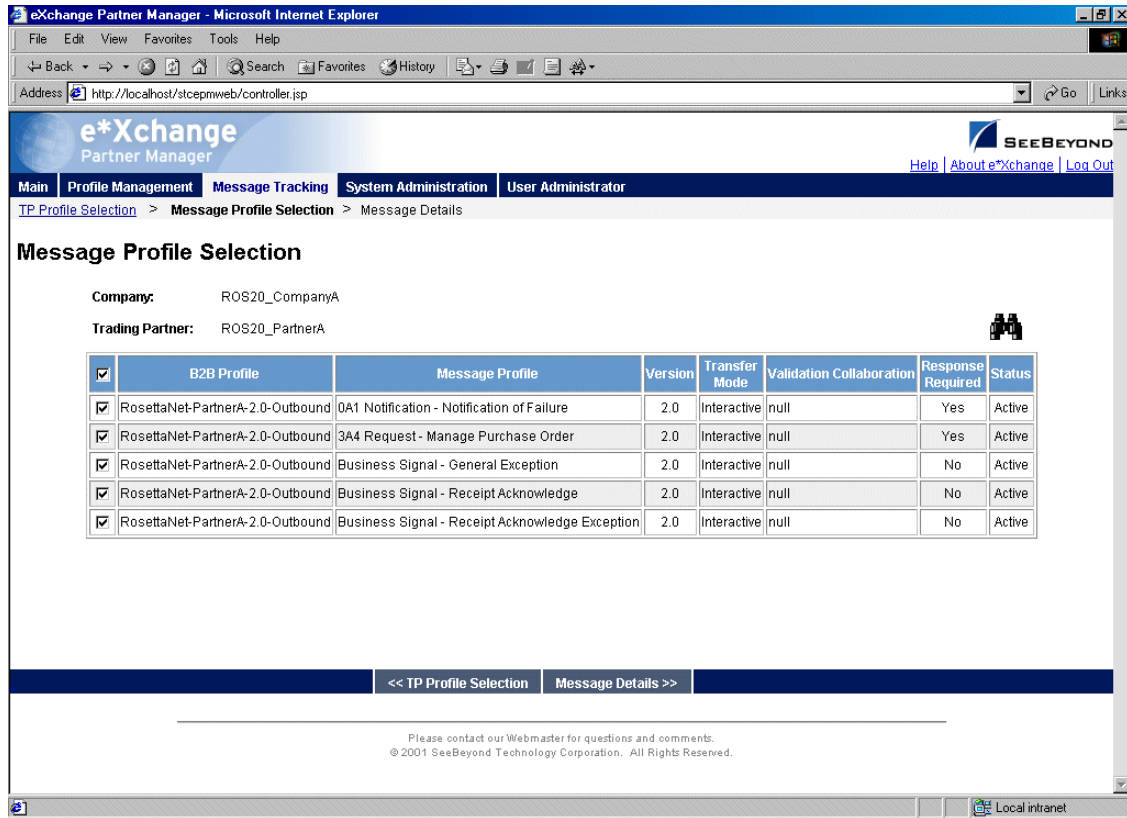
Please contact our Webmaster for questions and comments.
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Done Local intranet

- 2 Enter or select search criteria, and then click **Message Profile Selection** to create a list of message profiles matching the search criteria.

The **Message Profile Selection** page appears (see Figure 89).

Figure 89 Message Profile Selection



9.1.2 Choosing the Messages to View

The **Message Profile Selection** list shows you the envelope profiles that match the search criteria you entered on the **TP Profile Selection** page. The next step is to select from this list the envelope or envelopes for which you want to view messages.

To choose the messages to view

- 1 At the **Message Profile Selection** list, do one of the following:
 - ♦ To select an individual profile for which you want to view messages, check the check box to the left of the envelope profile.
 - ♦ To select all profiles, check the check box in the column header. You can then clear individual check boxes as needed.
- 2 Click the **Message Details** link to view the resulting list.
- 3 The **Message Details** page appears (see Figure 90).

Figure 90 Message Details

The screenshot shows the e*Exchange Partner Manager web interface. The browser window title is "e*Exchange Partner Manager - Microsoft Internet Explorer". The address bar shows "http://localhost/stcepmweb/controller.jsp". The page has a navigation bar with tabs: Main, Profile Management, Message Tracking (selected), System Administration, and User Administrator. Below the navigation bar, there are links for "TP Profile Selection", "Message Profile Selection", and "Message Details". The main content area is titled "Message Details". It shows the "Company" as "ROS20_CompanyA" and the "Trading Partner" as "ROS20_PartnerA". There is a "Refresh" button and a "Sort By:" dropdown menu. Below this is a table with the following columns: B2B Protocol, Message Profile, Error Data, Unique ID, Msg Send Time, Last Send Time, Response Required, Ack Time, Sent Cnt, Original Message, Enveloped Message, Ack Message, and Extended Attributes. The table contains several rows of message data, including Unique IDs, send times, and links to view the original, enveloped, and acknowledged messages.

B2B Protocol	Message Profile	Error Data	Unique ID	Msg Send Time	Last Send Time	Response Required	Ack Time	Sent Cnt	Original Message	Enveloped Message	Ack Message	Extended Attributes
RosettaNet-PartnerA-2.0-Outbound	3A4 Request-Manage Purchase Order	No	987654321 3A4 2060 Create Purchase Order Purchase Order RequestAction PRF	5/25/2001 15:29:56	9/27/2001 12:14:49	Yes	null	1	156	none	none	view
RosettaNet-PartnerA-2.0-Outbound	3A4 Request-Manage Purchase Order	No	987654321 3A4 2060 Create Purchase Order Purchase Order RequestAction ACK	5/25/2001 15:29:56	9/27/2001 12:14:49	Yes	null	1	156	none	none	view
RosettaNet-PartnerA-2.0-Outbound	3A4 Request-Manage Purchase Order	No	987654321 3A4 2059 Create Purchase Order Purchase Order RequestAction PRF	5/24/2001 14:58:13	5/24/2001 14:58:13	Yes	null	1	153	none	none	view
RosettaNet-PartnerA-2.0-Outbound	3A4 Request-Manage Purchase Order	No	987654321 3A4 2059 Create Purchase Order Purchase Order RequestAction ACK	5/24/2001 14:58:13	5/24/2001 14:58:13	Yes	null	1	153	none	none	view
RosettaNet-PartnerA-2.0-Outbound	3A4 Request-Manage Purchase Order	No	987654321 3A4 2058 Create Purchase Order Purchase Order RequestAction PRF	5/24/2001 14:56:0	5/24/2001 14:56:0	Yes	null	1	149	none	none	view
RosettaNet-PartnerA-2.0-Outbound	3A4 Request-Manage Purchase Order	No	987654321 3A4 2058 Create Purchase Order Purchase Order RequestAction ACK	5/24/2001 14:56:0	5/24/2001 14:56:0	Yes	5/24/2001 14:57:6	1	149	none	152	view
RosettaNet-PartnerA-2.0-Outbound	3A4 Request-Manage Purchase Order	No	987654321 3A4 2057 Create Purchase Order Purchase Order RequestAction PRF	5/24/2001 14:50:9	5/24/2001 14:50:9	Yes	null	1	148	none	none	view
RosettaNet-	3A4 Request-		987654321 3A4 2057 Create	5/24/2001	5/24/2001							

9.1.3 Viewing the Message Details

The next step is to look at the actual messages.

To view the message details

- 1 Select the message you want to view. To assist you in locating the message, you can sort the list by any of the following fields:

- ◆ Unique ID
- ◆ Original Message ID
- ◆ Ack Message ID
- ◆ Enveloped Message ID (outbound only)

You can also choose **Specify Sort Columns** to access the **Specify Sort Columns** page (Figure 91) and sort by multiple columns.

Figure 91 Message Tracking: Specify Sort Columns Page

Available Columns	Sorting Options
Error Data	<input type="radio"/> Ascending <input type="radio"/> Descending
Unique	<input type="radio"/> Ascending <input type="radio"/> Descending
Original Message ID	<input type="radio"/> Ascending <input type="radio"/> Descending
Ack Message ID	<input type="radio"/> Ascending <input type="radio"/> Descending
Message Receive Time	<input type="radio"/> Ascending <input type="radio"/> Descending
Ack Queue Time	<input type="radio"/> Ascending <input type="radio"/> Descending
Return Receipt	<input type="radio"/> Ascending <input type="radio"/> Descending

SELECTED COLUMNS:

Help Reset Cancel Continue

- 2 If desired, change the display to show more messages per page (or fewer):
 - ♦ Click on the **Page Size** link as shown in Figure 92.

Figure 92 Changing the Display on the Message Tracking Details Page

Total Records: 48 **Page Size: 40** Result Pages: 1 , [Next >>]

Click to change record count per page

- ♦ At the prompt, type the new record count (1–100).
 - ♦ Click **OK**.
- 3 If necessary, page through the message list by clicking on the **Next** link at the bottom of the **Message Details** page.
 - 4 Do any of the following, if available for the selected message:
 - ♦ View the original message—click the blue underlined value in the **Original Msg** column to view the message in a separate window. For an example, see Figure 93.
 - ♦ View the acknowledgment message—click the blue underlined value in the **Ack Message** column to view the message in a separate window. For an example, see Figure 94.
 - ♦ View extended attributes—click the blue underlined value in the **Extended Attributes** column to view the attributes in a separate window. For an example, see Figure 95.
 - ♦ View message errors—click the red underlined value in the **Error Data** column to view the attributes in a separate window. For an example, see Figure 96.

Figure 93 Message Tracking: “View Original Message” Window

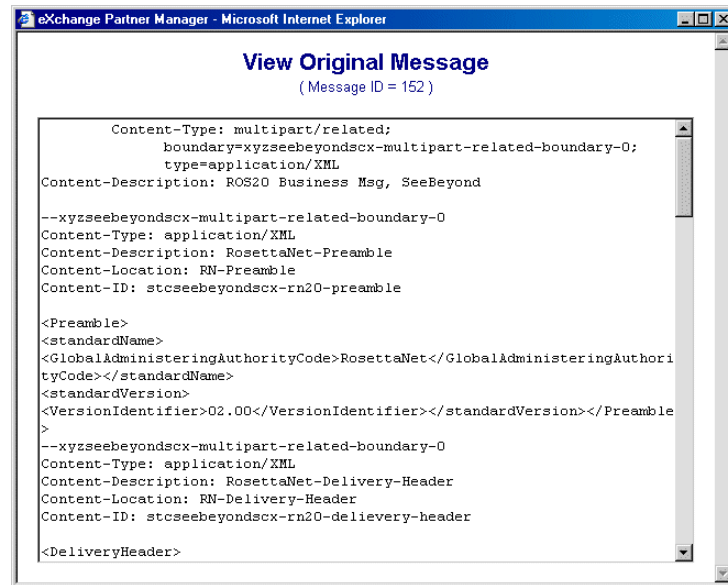


Figure 94 Message Tracking: “View Acknowledgment Message” Window



Figure 95 Message Tracking: “View Extended Attributes” Window

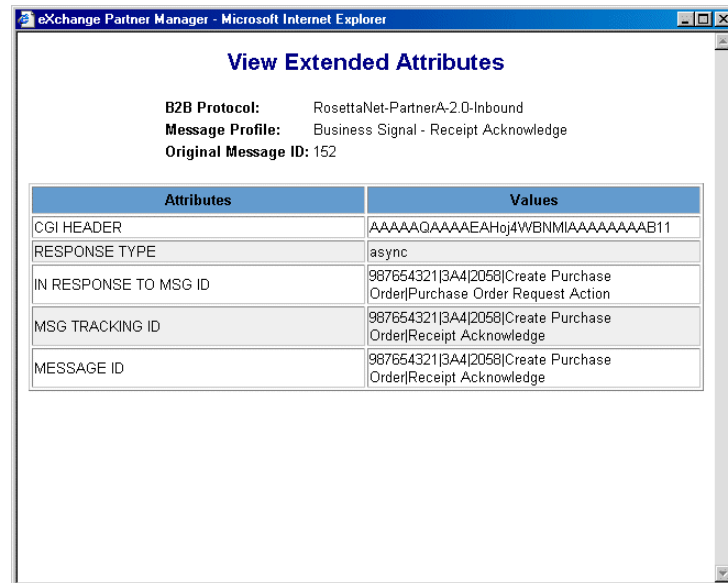
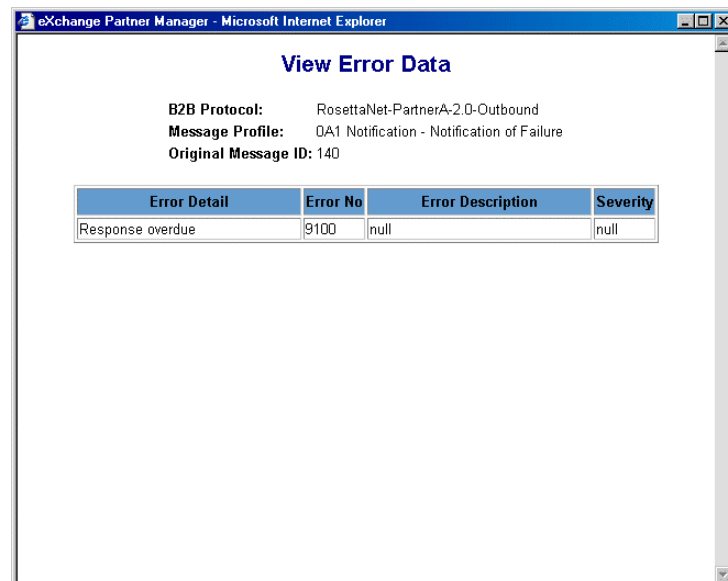


Figure 96 Message Tracking: “View Error Data” Window



9.2 Resending a Message

The e*Xchange Partner Manager Web interface allows you to manually resend a message to a trading partner from within the Message Tracking feature.

Certain conditions have to be met, as outlined below.

- A message that is not expecting a response can always be resent.
- A message that is expecting a single response can be resent providing there is an error on the response and the error is one of the following types:
 - ♦ Response overdue
 - ♦ Hit max re-send limit (or any error beginning with this)
- A message that is expecting multiple responses can be resent providing there is an error on *each* response and all errors are one of the following types:
 - ♦ Response overdue
 - ♦ Hit max re-send limit (or any error beginning with this)

A message that has already been resent cannot be resent again until the resend process has been completed.

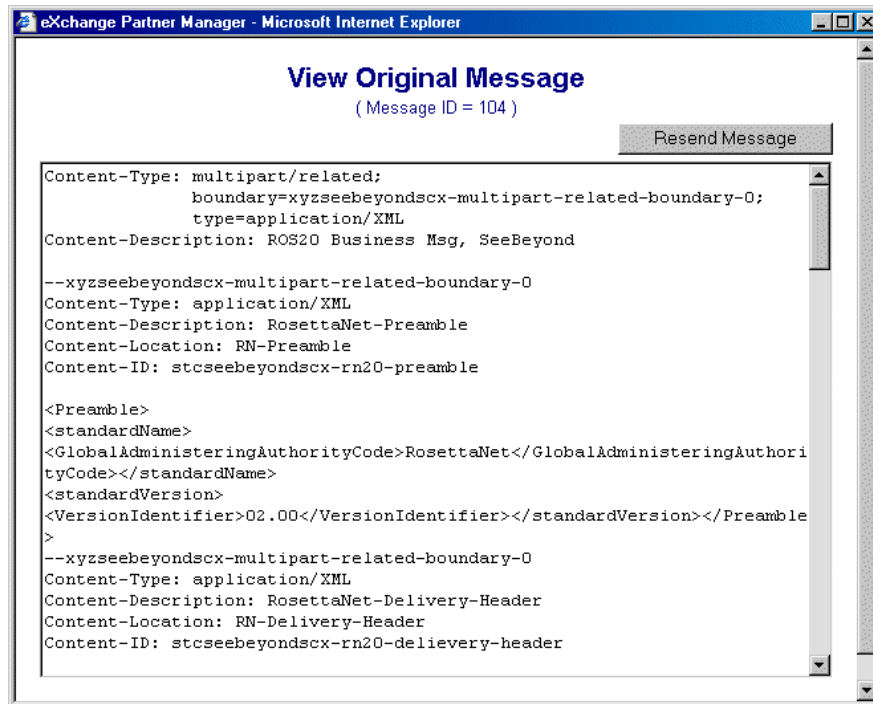
When a message is resent, the send count and last send time are incremented. A manual resend overrides the maximum send count setting.

To resend a message to a trading partner

- 1 On the **Message Details** page, click on the link in the **Original Message** column for that message.

The **View Original Message** window appears, as shown in Figure 97.

Figure 97 Message Tracking: “View Original Message” Window with Resend

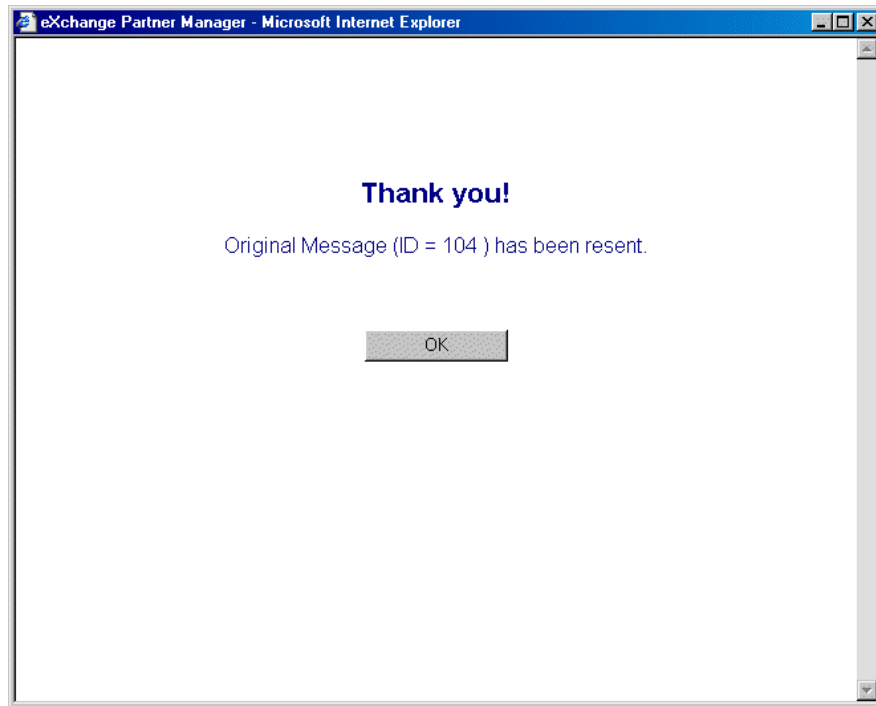


2 Click Resend Message.

Note: *If there is no Resend Message button on the message, the message does not meet the resend criteria and cannot be resent.*

A resend verification message appears, as shown in Figure 98.

Figure 98 Message Tracking: Resent Verification Message



- 3 Click **OK**.

e*Xchange Repository Manager

The e*Xchange Repository Manager is a new, Java-based graphical user interface, provided for import/export and archive/de-archive activities.

Because it is Java-based it has the following advantages:

- Can be run on platforms other than Microsoft Windows; for example, UNIX
- Supports DB2 UDB databases (the comparable functions in e*Xchange Client for Windows do not support DB2 UDB)

The Repository Manager is provided as a separate option during e*Xchange Partner Manager installation.

From this user interface you can complete the following activities:

- Archiving of company profiles
- Dearchiving of previously archived company profiles
- Exporting of company information
- Importing of previously exported company information

10.1 Logging In to the e*Xchange Repository Manager

The Repository Manager is a separate user interface. To log in with e*Xchange Repository Manager installed on Microsoft Windows, follow the steps below.

Note: When you start the Repository Manager, a DOS window opens up as well as the GUI. The Repository Manager requires this DOS window to run in the background; do not close it. When you close Repository Manager, the DOS window closes automatically.

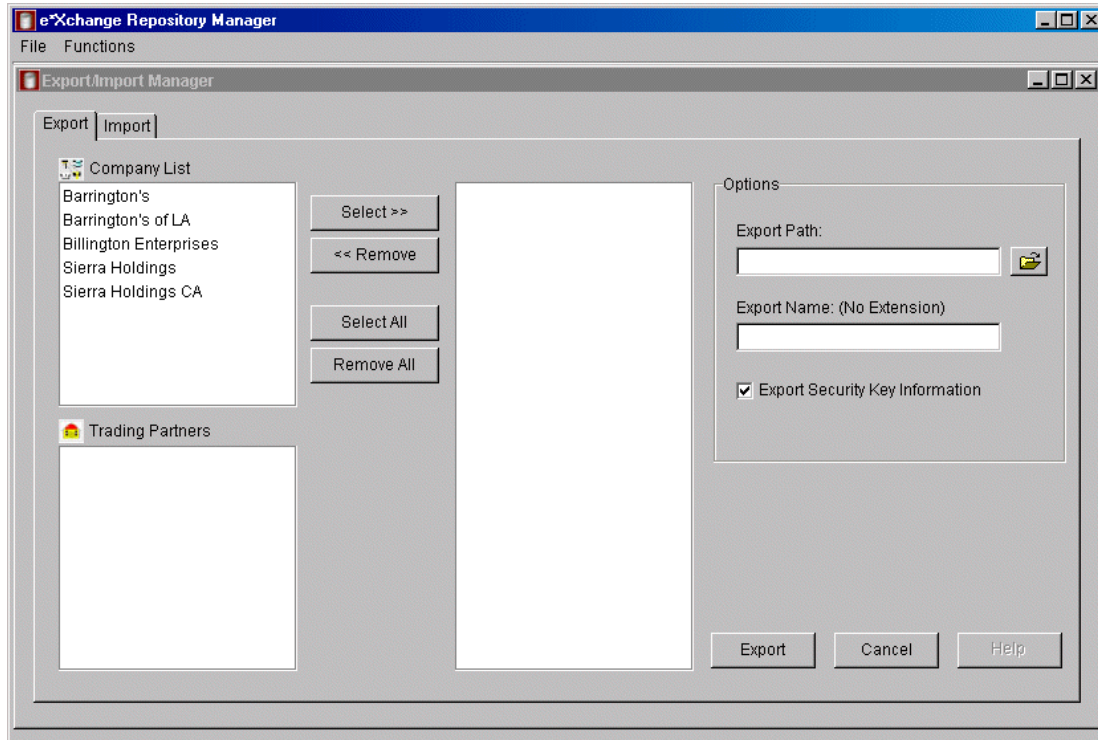
To log In to the Repository Manager

- 1 Start the Repository Manager in one of the following ways:
 - ♦ From the Start menu, select **Programs, e*Xchange Partner Manager, e*Xchange Repository Manager**.
 - ♦ Double-click the e*Xchange Repository Manager icon on your desktop.
- 2 Enter your database login ID.

- 3 Enter your database password.

The Repository Manager appears (see Figure 99).

Figure 99 e*Xchange Repository Manager



10.2 Export/Import from the e*Xchange Repository Manager

You can export data from the Repository Manager to an external file, and you can import information from the external file into another database.

The Export/Import feature allows importing and exporting between some different database types; for example, you can take the export file created by exporting from a SQL Server database and import it into an Oracle database. However, a UDB export file can only be imported into a UDB database.

To export information

- 1 On the **Functions** menu, click **Export/Import**.

The **Export/Import Manager** appears.

- 2 Click the **Export** tab.
- 3 Set the values as needed.

For more information, refer to Table 46.

- 4 Click the **Export** button to start the export operation.
When done, the **View Log** button appears (see Figure 100).
- 5 Click **OK**.

Figure 100 Export/Import Manager, Export Tab

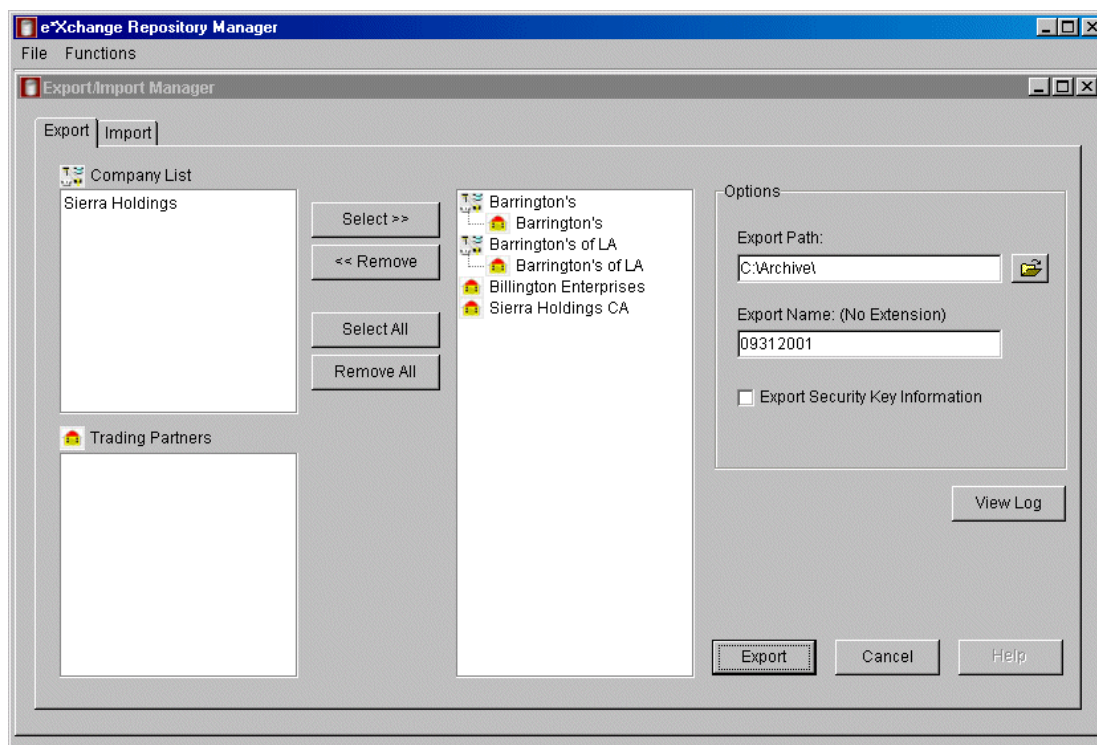


Table 46 Export/Import Manager, Export Tab

Name	Description
Company List	All companies are shown on the list.
Trading Partners list	All trading partners are shown on the list.

Table 46 Export/Import Manager, Export Tab (Continued)

Name	Description
Selection Buttons	Use the selection buttons to create a list of companies/trading partners whose messages you want to export, as follows: <ul style="list-style-type: none">▪ To select a company and all its trading partners, highlight the company in the left pane, and then click Select.▪ To select a trading partner and its parent company, highlight the trading partner on the Trading Partners list and then click Select. To select multiple trading partners, hold down the Shift or Ctrl keys when selecting.▪ To remove a company and all its trading partners from the export list, highlight the company in the right pane and then click Remove.▪ To remove a trading partner from the export list, highlight the trading partner in the right pane and then click Remove. To remove multiple trading partners, hold down the Shift or Ctrl keys when selecting.▪ To select all companies and trading partners from the export list, click Select All.▪ To remove all companies and trading partners from the export list, click Remove All.
Export Path	Specify the path for the export file. Click on the icon to the right to access the Browse for Folder dialog box, and then choose a folder. Note: browse to the parent folder, and then <i>single-click</i> the folder in which you want to store the file, and then click OK .
Export Name (No extension)	Type the name of the export file, without extension. The Repository Manager exports the information to an ASCII file with the extension .exp .
Export Security Key Information	Clear this check box if you do <i>not</i> want security key information to be included in the export file. By default, security key information is exported.
Export	Click this button to start the export operation. When done, the Repository Manager displays an information message.
View Log	When the operation is complete, the View Log button appears. Click this button to view the log file. The log file is located in the folder specified in the Export Path and is always named epmExport.log. If for any reason you want to preserve a specific log file, back it up or rename it so that the next export process does not overwrite the file.

10.2.1 Before Importing

There are some important points to note before you start the import process:

- When you import the information, the associations between messages and responses might not be preserved. When you have imported, check the Return Envelope settings in the Web interface (Message Profile level) to ensure the correct return envelopes are selected.
- Make sure your database schema is updated before importing. If you have upgraded from an earlier version of e*Xchange, make sure you have run all database upgrade scripts. Importing from a file that was exported from an earlier version database structure might cause problems.

To import information

- 1 On the **Functions** menu, click **Export/Import**.
The **Export/Import Manager** appears.
- 2 Click the **Import** tab (see Figure 101).
- 3 Set the values as needed.
For more information, refer to Table 47.
- 4 Click the **Import** button to start the import operation.
When done, the Repository Manager displays an information message.
- 5 Click **OK**.

Figure 101 Export/Import Manager, Import Tab

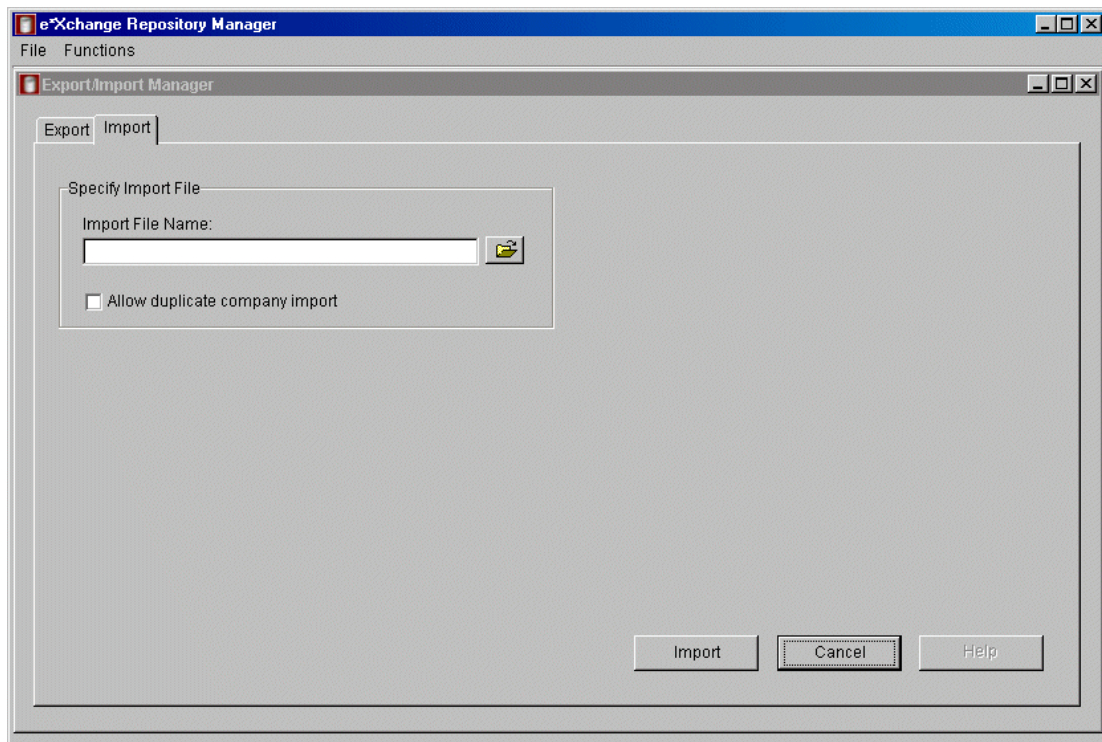


Table 47 Export/Import Manager, Import Tab

Name	Description
Import File Name	Specify the path for the file to be imported. Click on the icon to the right to access the Select Import File dialog box, navigate to the folder if needed, and then choose the file.

Table 47 Export/Import Manager, Import Tab (Continued)

Name	Description
Allow duplicate company import	This check box controls whether duplicate information will be imported. If the import file contains components already in the database, and you want to import the duplicate information, check this check box. The Repository Manager appends a unique ID to the company name for any duplicates that are imported. Leave this check box clear to skip the duplicates when importing.
Import button	Click this button to start the import operation. When done, the Repository Manager displays an information message.
View Log	When the operation is complete, the View Log button appears. Click this button to view the log file. The log file is located in the folder where the import file is located and is always named epmlimport.log . If for any reason you want to preserve a specific log file, back it up or rename it so that the next import process does not overwrite the file.

10.3 Archive/De-Archive from the e*Xchange Repository Manager

Using the Repository Manager, you can archive data from the e*Xchange Partner Manager database to an external file. You can also use the external file to de-archive the information into a new, empty database.

Only companies for which there are no active messages within the selected date range are available for archiving. If there are any active messages (either in the queue to be sent, or expecting a response) within the date range, the company does not appear on the selection list.

The Archive/De-Archive feature allows archiving and de-archiving between different database types; for example, you can take the file created by archiving from a SQL Server database and de-archive it to an Oracle database. The exception to this is DB2 UDB; an archive from a DB2 UDB database can only be de-archived to another DB2 UDB database.

De-archived data is for reference only since the sequence numbers would not match the sequence numbers in a new database and only those Message Tracking attributes that are used by the de-archived file are available for use.

When you de-archive, e*Xchange always deletes any information already existing in the database. You cannot combine multiple archive files.

The archive file is in compressed format.

Caution: *This operation deletes information from your database. As with any major operation affecting your business information, you should back up your data before starting*

*the archiving process. Make a full backup of your e*Xchange database tables using the standard backup procedure for your database.*

10.3.1 Changes to Settings During Archiving

It is important to realize that during the archive process certain logging features are turned off, and constraints dropped, in the interests of getting the archive completed as quickly as possible.

Changes to Logging and Constraints

The changes to the e*Xchange operation during archiving vary according to the type of database you are using. Refer to Table 48 for specific information on activities and tables that are affected during the archiving process.

Table 48 Changes to e*Xchange Operation During Archiving

Database	Changes
Oracle	<ul style="list-style-type: none"> ■ Logging is disabled for the following tables: <ul style="list-style-type: none"> ♦ es_mtrk_inb ♦ es_mtrk_outb ♦ es_msg_storage ♦ es_msg_ascii ♦ es_msg_security ♦ es_msg_binary ♦ es_mtrk_error ♦ es_mtrk_ext_data ■ The following constraints are disabled: <ul style="list-style-type: none"> ♦ es_mtrk_inb_fk1 ♦ es_mtrk_inb_fk2 ♦ es_mtrk_outb_fk1 ♦ es_mtrk_outb_fk2 ♦ es_mtrk_outb_fk3
SQL Server	<ul style="list-style-type: none"> ■ The following constraints are disabled: <ul style="list-style-type: none"> ♦ es_mtrk_inb_fk1 ♦ es_mtrk_inb_fk2 ♦ es_mtrk_outb_fk1 ♦ es_mtrk_outb_fk2 ♦ es_mtrk_outb_fk3
Sybase	<ul style="list-style-type: none"> ■ The following constraints are dropped during the archive and recreated later: <ul style="list-style-type: none"> ♦ es_mtrk_inb_fk1 ♦ es_mtrk_inb_fk2 ♦ es_mtrk_outb_fk1 ♦ es_mtrk_outb_fk2 ♦ es_mtrk_outb_fk3

Table 48 Changes to e*Xchange Operation During Archiving

Database	Changes
DB2 UDB	<ul style="list-style-type: none"> The following constraints are dropped during the archive and recreated later: <ul style="list-style-type: none"> es_mtrk_inb_fk1 es_mtrk_inb_fk2 es_mtrk_outb_fk1 es_mtrk_outb_fk2 es_mtrk_outb_fk3

Restoring the Settings

Once the archiving procedure is complete, logging is re-enabled and the constraints are enabled.

However, if there is an error during archiving—for example, a power outage—you must make sure that your settings are restored so that you have the correct logging and constraints. To do this, follow the instructions below for each type of database.

To restore Oracle logging and constraints

- At the Oracle prompt, re-enable logging by running the following command (substituting the specific table names):
ALTER TABLE <table name> LOGGING
- At the Oracle prompt, re-enable constraints by running the following command (substituting the specific table names and also constraint names):
ALTER TABLE <table name> ENABLE CONSTRAINT <constraint name>

To restore SQL Server constraints

- At the SQL Server prompt, re-enable constraints by running the following command (substituting the specific table names and also constraint names):
ALTER TABLE <table name> CHECK CONSTRAINT <constraint name>

To restore Sybase or DB2 UDB constraints

- At the Sybase or DB2 UDB prompt, re-enable constraints by running the following commands:
ALTER TABLE es_mtrk_inb ADD CONSTRAINT es_mtrk_inb_fk1 foreign key (orig_msg_id) references es_msg_storage (msg_storage_id)
ALTER TABLE es_mtrk_inb ADD CONSTRAINT es_mtrk_inb_fk2 foreign key (ack_msg_id) references es_msg_storage (msg_storage_id)
ALTER TABLE es_mtrk_outb ADD CONSTRAINT es_mtrk_outb_fk1 foreign key (orig_msg_id) references es_msg_storage (msg_storage_id)
ALTER TABLE es_mtrk_outb ADD CONSTRAINT es_mtrk_outb_fk2 foreign key (env_msg_id) references es_msg_storage (msg_storage_id)
ALTER TABLE es_mtrk_outb ADD CONSTRAINT es_mtrk_outb_fk3 foreign key (ack_msg_id) references es_msg_storage (msg_storage_id)

10.3.2 Running the Archive Feature

To archive information

- 1 On the **Functions** menu, click **Archive/De-archive**.

The **Archive/De-Archive Manager** appears.

- 2 Click the **Archive** tab (see Figure 102).
- 3 Set the values as needed. For more information, refer to Table 49.

Since companies with active messages cannot be archived, changing the date selection might increase or decrease the number of companies available for archiving.

- 4 Click the **Archive** button to start the archiving operation.

When done, the Repository Manager displays an information message.

Note: *If you have selected **Delete Message Records**, the Repository Manager creates the archive file before deleting the message records. However, it does not close the archive file until the deletion operation is also complete. Wait for the entire process to be complete before attempting to do anything with the archive file. In addition, Repository Manager used a background DOS window; you must leave this window open. When you close Repository Manager, the DOS window closes automatically.*

- 5 Click **OK**.

Figure 102 Archive/De-Archive Manager, Archive Tab

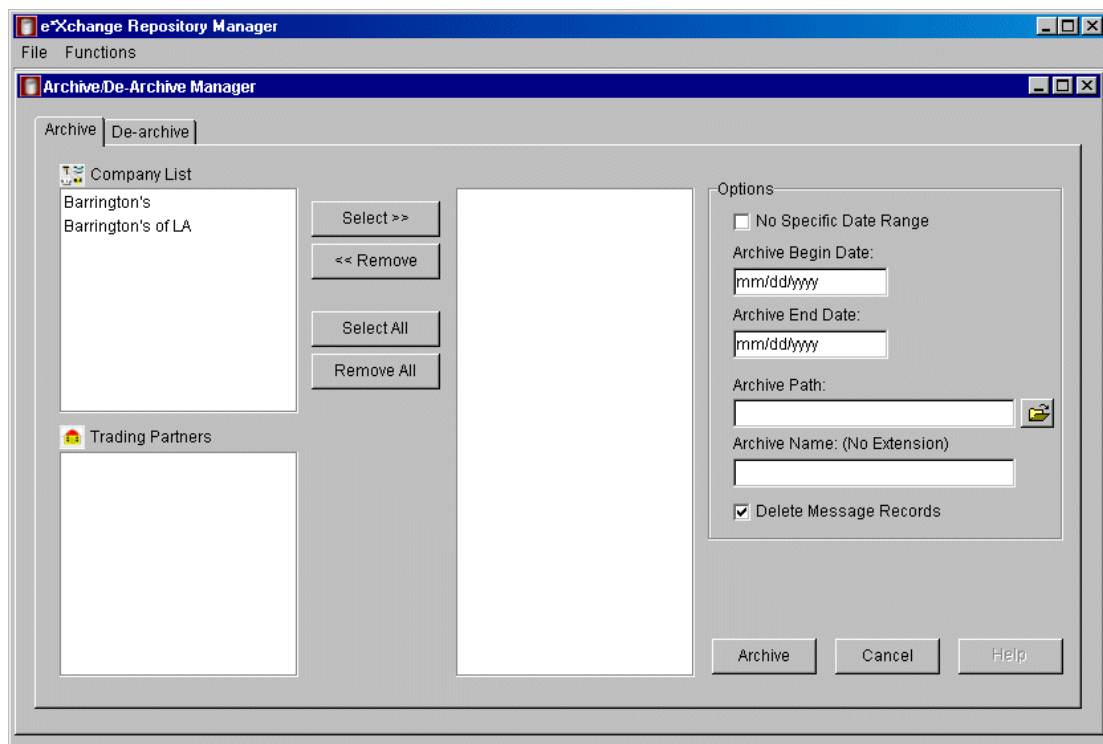


Table 49 Archive/De-Archive Manager, Archive Tab

Name	Description
Company List	All companies for which there are inner envelopes set up are shown on the list.
Trading Partners list	All trading partners for which there are inner envelopes set up are shown on the list.
Selection Buttons	<p>Use the selection buttons to create a list of companies/trading partners for message archiving, as follows:</p> <ul style="list-style-type: none"> ▪ To select a company and all its trading partners, highlight the company in the left pane, and then click Select. ▪ To select a trading partner and its parent company, highlight the trading partner on the Trading Partners list and then click Select. You can also select multiple trading partners by holding down the Shift or Ctrl keys when selecting. ▪ To remove a company and all its trading partners from the archiving list, highlight the company in the right pane and then click Remove. ▪ To remove a trading partner from the archiving list, highlight the trading partner in the right pane and then click Remove. You can also remove multiple trading partners by holding down the Shift or Ctrl keys when selecting. ▪ To select all companies and trading partners from the archiving list, click Select All. ▪ To remove all companies and trading partners from the archiving list, click Remove All.
No Specific Date Range	<p>To archive all companies and trading partners that do not have active messages, check this check box.</p> <p>Note: Companies or trading partners that have active messages (for example, expecting a response) within the selected date range cannot be archived.</p>
Archive Begin Date/Archive End Date	To specify a date range for archiving, set beginning and ending dates. These values default to a date range that includes all the information in the database.
Archive Path	<p>Specify the path for the archive file. Click on the icon to the right to access the Browse for Folder dialog box, and then choose a folder. Do not choose a file name.</p> <p>Note: browse to the parent folder, <i>single-click</i> the folder in which you want to store the file, and then click OK.</p>
Archive Name (No extension)	<p>Type the name of the archive file, without extension. The Repository Manager makes a compressed file with the extension .zip.</p> <p>Note: After archiving, do not change the name of the archive file. If you do, the de-archive process will not work.</p>

Table 49 Archive/De-Archive Manager, Archive Tab (Continued)

Name	Description
Delete Message Records	If you want the archived messages to be deleted from the database, leave this as checked (the default). If you want to leave the messages in the database, clear this check box. Note: If you are deleting messages, it is a good idea to set a date range so that you do not delete messages that are still active.
Archive	Click this button to start the archiving operation. When done, the Repository Manager displays an information message.
View Log	When the operation is complete, the View Log button appears. Click this button to view the log file. The log file is located in the folder specified in the Archive Path and is always named epmARC.log . If for any reason you want to preserve a specific log file, back it up or rename it so that the next archive process does not overwrite the file.

To de-archive information

- 1 On the **Functions** menu, click **Archive/De-Archive**.
The **Archive/De-Archive Manager** appears.
- 2 Click the **De-Archive** tab (see Figure 103).
- 3 Set the values as needed.
For more information, refer to Table 50.
- 4 Click the **De-Archive** button to start the de-archiving operation.
When done, the Repository Manager displays an information message.
- 5 Click **OK**.

Figure 103 Archive/De-Archive Manager, De-Archive Tab

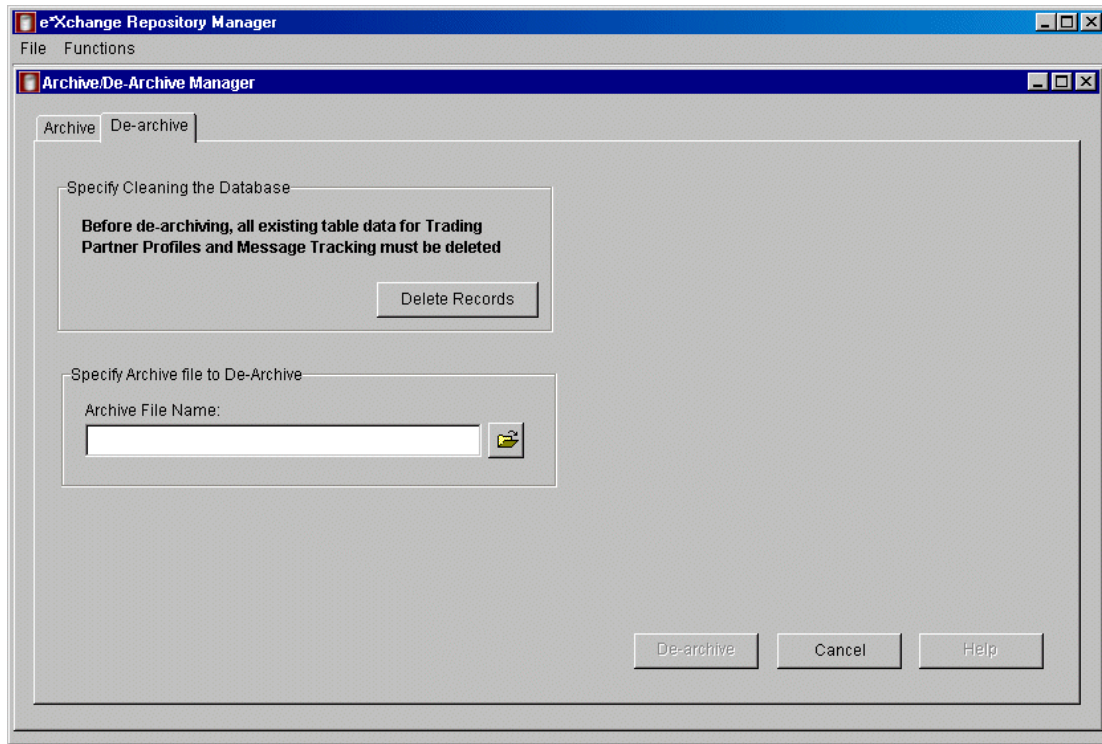


Table 50 Archive/De-Archive Manager, De-Archive Tab

Name	Description
Delete Records	You must click Delete Records before de-archiving the archive file. This ensures that the target database is empty.
Archive File Name	Specify the path for the archive file. Click on the icon to the right to access the Select Archive File dialog box, navigate to the folder if needed, and then choose the file. Note: The archive file name must be the name selected when you originally archived the information. If the archive file has been renamed, the de-archive process will not work.
De-Archive button	Click this button to start the de-archiving operation. When done, the Repository Manager displays an information message.
View Log	When the operation is complete, the View Log button appears. Click this button to view the log file. The log file is located in the folder where the archive file is located and is always named epmDearc.log . If for any reason you want to preserve a specific log file, back it up or rename it so that the next de-archive process does not overwrite the file.

e*Xchange Client for Windows Administration

Before the typical user begins to create trading partner profiles in e*Xchange Client for Windows, some setup is required. This is done by a member of the eX Administrator user group, who must perform some or all of the following tasks:

- Set up validation Collaborations that will be used in routing and processing messages
- Set default attribute values for each eBusiness protocol version that you will be using
- Define the specific messages that you will use, with the validation Collaboration and attribute values of each, for each eBusiness protocol version that you will be using
- Define default values for the eBusiness messages that you will be using

Note: *If an X12 or UN/EDIFACT transaction or a RosettaNet Action Message/Business Signal is to be used in a profile, you must define it in **Inner Envelope Definition Setup** first.*

- Update drop-down value lists (optional)
- Establish system defaults (required only if you want to change the predefined defaults)
- Add report definitions (required if you want to generate reports)

11.1 Validation Collaboration Setup

Within e*Xchange, a validation Collaboration defines the syntax and validates the content of electronic business-to-business messages.

Within the e*Xchange Partner Manager, you can specify a validation Collaboration for each unique type of electronic message that is sent or received. The Collaboration enables e*Gate to verify that the message follows the standard format for that protocol and version.

If you are communicating with a specific trading partner using X12 or UN/EDIFACT, you can use the Validation Rules Builder to automatically generate a validation

Collaboration and an Event Type Definition based on the SEF (see “[Standard Exchange Format \(SEF\)](#)” on page 426) file for the transaction. Once generated by the Validation Rules Builder, you can add the validation Collaboration files to the list in the user interface via **Validation Collaboration Setup**. Once added, they are available for selection within e*Xchange Partner Manager, in **Inner Envelope Definition Setup**.

To add a validation Collaboration


- 1 On the **Functions** menu, click **Validation Collaboration Setup**.
The **Validation Collaboration Setup** dialog box appears (see Figure 104).
- 2 To add a Collaboration to the table, click **New** .
- 3 In the **Select File** column, click the magnifying glass, navigate to the file location, and select the appropriate **tsc** file.
- 4 In the **eBusiness Protocol** box, choose the appropriate protocol from the drop-down list.
- 5 In the **Version** box, choose the appropriate version from the drop-down list.
- 6 In the **Transaction Set ID** box, type the ID number for the message type.
- 7 Click **Apply** to validate and save the new values.
- 8 Click **OK** to close the Validation Collaboration Setup window.

Figure 104 Validation Collaboration Setup

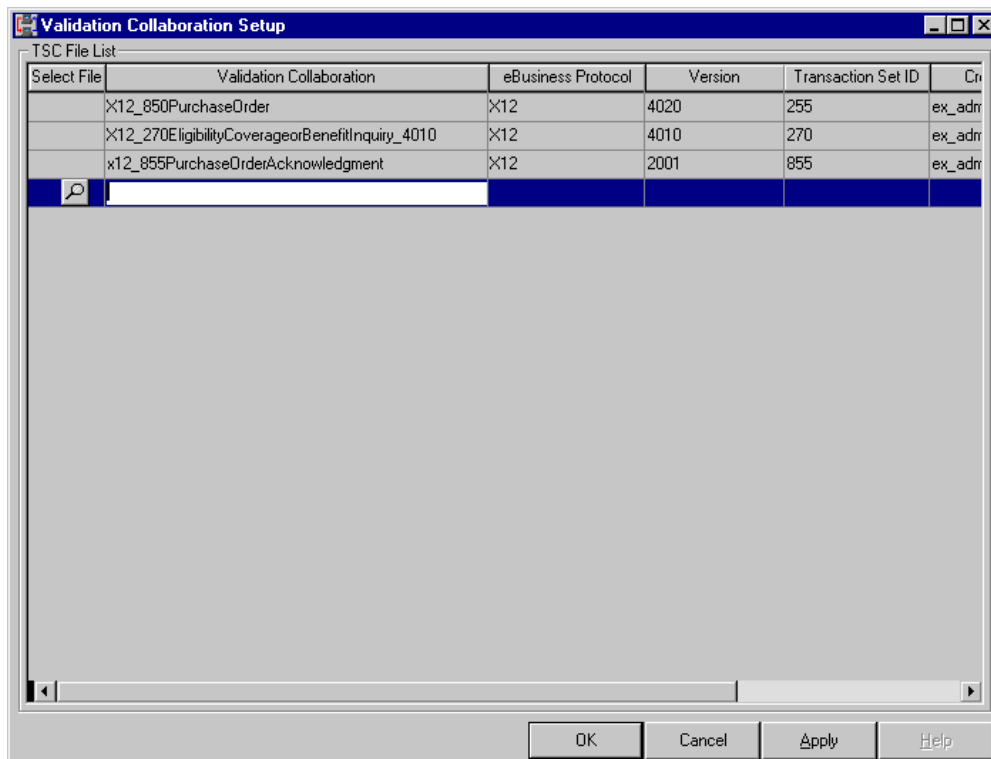


Table 51 Validation Collaboration Setup Fields

Name	Description
Select File	This allows you to select a *.tsc (validation Collaboration) file. Click on the magnifying glass to access the Open dialog box so that you can navigate to the location of the file.
Validation Collaboration	Once you have selected a validation Collaboration file, the name is displayed.
eBusiness Protocol	The eBusiness protocol to which the Collaboration file relates.
Version	The version of the eBusiness protocol to which the file relates. Select from the drop-down list. Note: The Validation Rules Builder automatically appends the protocol version to the file name; for example, X12_850PurchaseOrder_3070. Make sure you select the correct version as indicated by the file name.
Transaction Set ID	The ID for the actual message type; for example, 850 for a Purchase Order in X12.
Created By	The user ID of the person who added the Collaboration is displayed.
Created Time	The date and time the Collaboration was saved or updated is displayed.

11.2 Archive/De-Archive

You can archive data from the e*Xchange Partner Manager database to an external file. You can also use the external file to de-archive the information into a new, empty database.

The Archive/De-Archive feature allows archiving and de-archiving between different database types; for example, you can take the file created by archiving from a SQL Server database and de-archive it to an Oracle database.

e*Xchange Client for Windows supports archiving and de-archiving from and to Oracle, Sybase, and SQL Server. The e*Xchange Web interface supports these three and also DB2 UDB.

De-archived data is for reference only since the sequence numbers would not match the sequence numbers in a new database and only those Message Tracking attributes that are used by the de-archived file are available for use.

When you de-archive, it always deletes any information already existing in the database. For this reason, you cannot combine multiple archive files.

The archive file is in compressed format.

Caution: *This operation deletes information from your database. As with any major operation affecting your business information, you should back up your data before starting*

*the archiving process. Make a full backup of your e*Xchange database tables using the standard backup procedure for your database.*

11.2.1 Changes to Settings During Archiving

It is important to realize that during the archive process certain logging features are turned off, and constraints dropped, in the interests of getting the archive completed as quickly as possible.

Changes to Logging and Constraints

The changes to the e*Xchange operation during archiving vary according to the type of database you are using. Refer to Table 52 for specific information on activities and tables that are affected during the archiving process.

Table 52 Changes to e*Xchange Operation During Archiving

Database	Changes
Oracle	<ul style="list-style-type: none"> ■ Logging is disabled for the following tables: <ul style="list-style-type: none"> ♦ es_mtrk_inb ♦ es_mtrk_outb ♦ es_msg_storage ♦ es_msg_ascii ♦ es_msg_security ♦ es_msg_binary ♦ es_mtrk_error ♦ es_mtrk_ext_data ■ The following constraints are disabled: <ul style="list-style-type: none"> ♦ es_mtrk_inb_fk1 ♦ es_mtrk_inb_fk2 ♦ es_mtrk_outb_fk1 ♦ es_mtrk_outb_fk2 ♦ es_mtrk_outb_fk3
SQL Server	<ul style="list-style-type: none"> ■ The following constraints are disabled: <ul style="list-style-type: none"> ♦ es_mtrk_inb_fk1 ♦ es_mtrk_inb_fk2 ♦ es_mtrk_outb_fk1 ♦ es_mtrk_outb_fk2 ♦ es_mtrk_outb_fk3
Sybase	<ul style="list-style-type: none"> ■ The following constraints are dropped during the archive and recreated later: <ul style="list-style-type: none"> ♦ es_mtrk_inb_fk1 ♦ es_mtrk_inb_fk2 ♦ es_mtrk_outb_fk1 ♦ es_mtrk_outb_fk2 ♦ es_mtrk_outb_fk3

Restoring the Settings

Once the archiving procedure is complete, logging is re-enabled and the constraints are enabled.

However, if there is an error during archiving—for example, a power outage—you must make sure that your settings are restored so that you have the correct logging and constraints. To do this, follow the instructions below for each type of database.

To restore Oracle logging and constraints

- 1 At the Oracle prompt, re-enable logging by running the following command (substituting the specific table names):

ALTER TABLE <table name> LOGGING

- 2 At the Oracle prompt, re-enable constraints by running the following command (substituting the specific table names and also constraint names):

ALTER TABLE <table name> ENABLE CONSTRAINT <constraint name>

To restore SQL Server constraints

- At the SQL Server prompt, re-enable constraints by running the following command (substituting the specific table names and also constraint names):

ALTER TABLE <table name> CHECK CONSTRAINT <constraint name>

To restore Sybase constraints

- 1 At the Sybase prompt, re-enable constraints by running the following commands:

ALTER TABLE es_mtrk_inb ADD CONSTRAINT es_mtrk_inb_fk1 foreign key (orig_msg_id) references es_msg_storage (msg_storage_id)

ALTER TABLE es_mtrk_inb ADD CONSTRAINT es_mtrk_inb_fk2 foreign key (ack_msg_id) references es_msg_storage (msg_storage_id)

ALTER TABLE es_mtrk_outb ADD CONSTRAINT es_mtrk_outb_fk1 foreign key (orig_msg_id) references es_msg_storage (msg_storage_id)

ALTER TABLE es_mtrk_outb ADD CONSTRAINT es_mtrk_outb_fk2 foreign key (env_msg_id) references es_msg_storage (msg_storage_id)

ALTER TABLE es_mtrk_outb ADD CONSTRAINT es_mtrk_outb_fk3 foreign key (ack_msg_id) references es_msg_storage (msg_storage_id)

11.2.2 Running the Archive Feature

To set up the archiving feature

- 1 On the **Functions** menu, click **Archive/De-Archive**.
The **Archive/De-Archive Manager** appears.
- 2 Click the **Configuration** tab (see Figure 105).
- 3 Set the values as needed. For more information, refer to Table 53.
- 4 Click **OK** to save and close, or click another tab to archive or de-archive messages.

Figure 105 Archive/De-Archive Manager, Configuration Tab (Oracle)

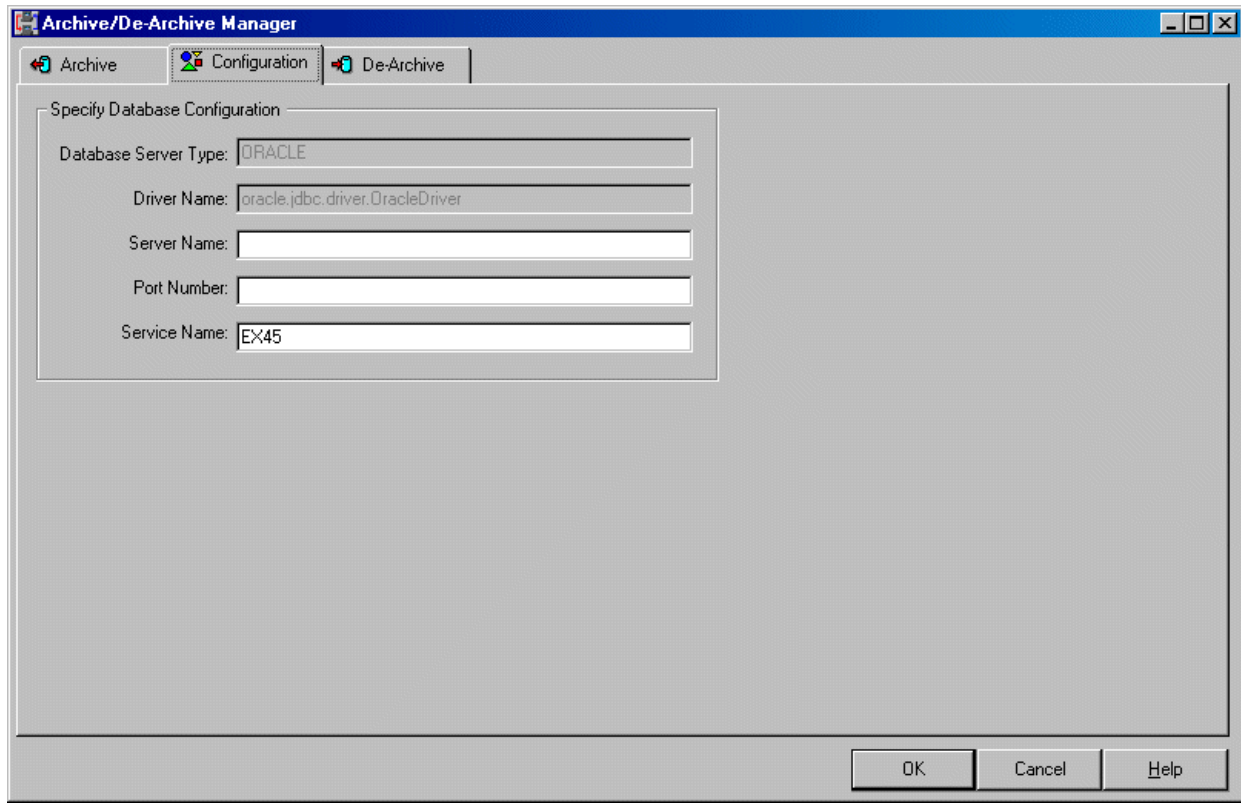


Table 53 Archive/De-Archive Manager, Configuration Tab

Name	Description
Database Server Type	The database server type is displayed.
Driver Name	The name of the database driver is displayed.
Server Name (Oracle only)	Type the Oracle server name. The value must match the HOST value for the database in the tnsnames.ora file.
Port Number (Oracle only)	Type the port number for Oracle database access. This must match the PORT value for the database in the tnsnames.ora file.
Service Name (Oracle only)	Type the Oracle database service name. This must match the SERVICE_NAME or SID value for the database in the tnsnames.ora file.
ODBC Driver Name (SQL Server and Sybase only)	The name of the SQL Server or Sybase database driver is displayed.

To archive information

- 1 On the **Functions** menu, click **Archive/De-Archive**.

The **Archive/De-Archive Manager** appears.

- 2 On the **Configuration** tab, set the configuration parameters correctly.
For more information, refer to **“Archive/De-Archive Manager, Archive Tab” on page 180**.
- 3 Click the **Archive** tab (see Figure 106).
- 4 Set the values as needed. For more information, refer to Table 54.

Note: If you are deleting messages, it is a good idea to set a date range so that you do not delete messages that are still active.

- 5 Click the **Archive** button to start the archiving operation.

When done, e*Xchange displays an information message.

Note: If you have selected Delete Message Records, e*Xchange creates the archive file before deleting the message records. However, it does not close the archive file until the deletion operation is also complete. Wait for the entire process to be complete before attempting to do anything with the archive file.

- 6 Click **OK**.

Figure 106 Archive/De-Archive Manager, Archive Tab

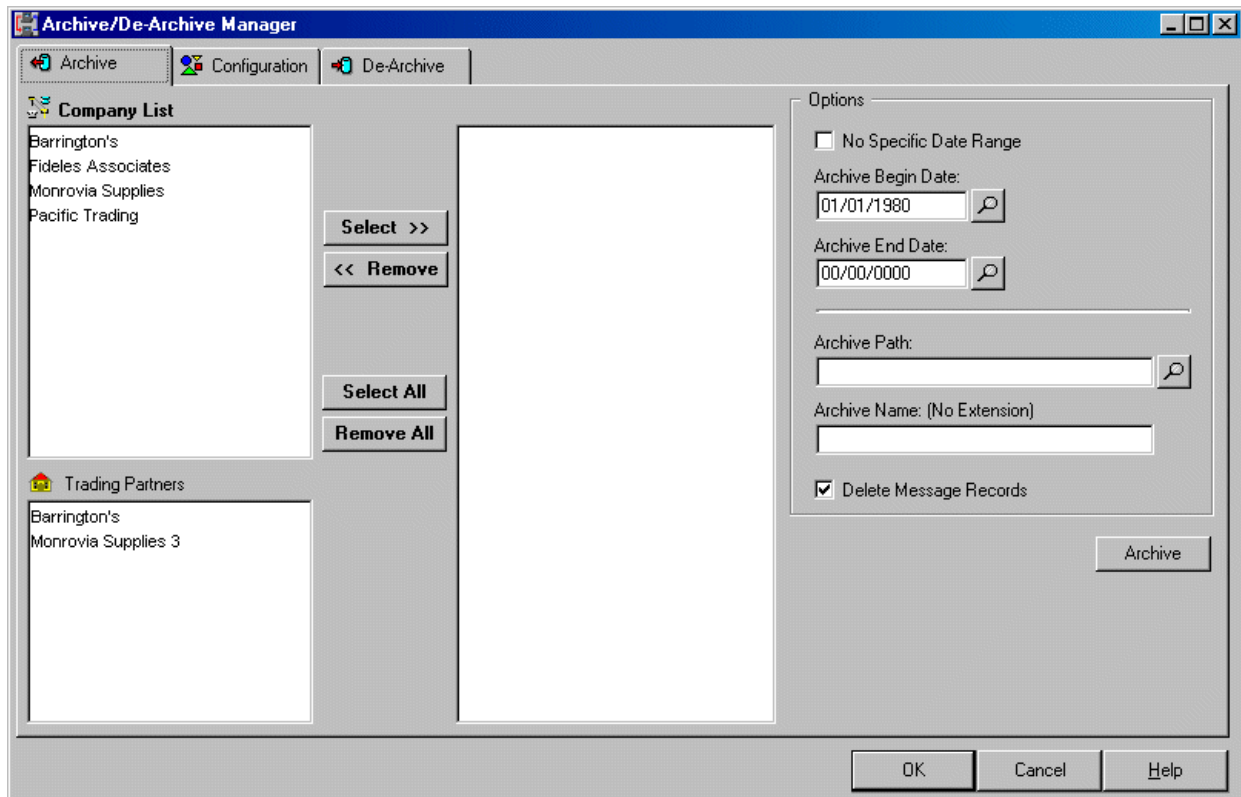


Table 54 Archive/De-Archive Manager, Archive Tab

Name	Description
Company List	All companies for which there are inner envelopes set up are shown on the list.
Trading Partners list	All trading partners for which there are inner envelopes set up are shown on the list.
Selection Buttons	<p>Use the selection buttons to create a list of companies/trading partners for message archiving, as follows:</p> <ul style="list-style-type: none"> ▪ To select a company and all its trading partners, highlight the company in the left pane, and then click Select. ▪ To select a trading partner and its parent company, highlight the trading partner on the Trading Partners list and then click Select. You can also select multiple trading partners by holding down the Shift or Ctrl keys when selecting. ▪ To remove a company and all its trading partners from the archiving list, highlight the company in the right pane and then click Remove. ▪ To remove a trading partner from the archiving list, highlight the trading partner in the right pane and then click Remove. You can also remove multiple trading partners by holding down the Shift or Ctrl keys when selecting. ▪ To select all companies and trading partners from the archiving list, click Select All. ▪ To remove all companies and trading partners from the archiving list, click Remove All.
No Specific Date Range	<p>To archive all messages, check this check box.</p> <p>Note: If you are deleting message records when you archive, ensure you do not archive messages that are still active (either in the queue to be sent, or expecting a response).</p>
Archive Begin Date/Archive End Date	To specify a date range for archiving, set beginning and ending dates. These values default to a date range that includes all the information in the database.
Archive Path	Specify the path for the archive file. Click on the icon to the right to access the Browse for Folder dialog box, and then choose a folder.
Archive Name (No extension)	<p>Type the name of the archive file, without extension. e*Xchange makes a compressed file with the extension .zip.</p> <p>Note: After archiving, do not change the name of the archive file. If you do, the de-archive process will not work.</p>
Delete Message Records	<p>If you want the archived messages to be deleted from the database, leave this as checked (the default). If you want to leave the messages in the database, clear this check box.</p> <p>Note: If you are deleting messages, it is a good idea to set a date range so that you do not delete messages that are still active.</p>
Archive	Click this button to start the archiving operation. When done, e*Xchange displays an information message.

Table 54 Archive/De-Archive Manager, Archive Tab (Continued)

Name	Description
View Log	When the operation is complete, the View Log button appears. Click this button to view the log file.

To de-archive information

- 1 On the **Functions** menu, click **Archive/De-Archive**.
The **Archive/De-Archive Manager** appears.
- 2 On the **Configuration** tab, set the configuration parameters correctly.
For more information, refer to [“Archive/De-Archive Manager, De-Archive Tab” on page 182](#).
- 3 Click the **De-Archive** tab (see Figure 107).
- 4 Set the values as needed. For more information, refer to Table 55.
- 5 Click the **De-Archive** button to start the de-archiving operation.
When done, e*Xchange displays an information message.
- 6 Click **OK**.

Figure 107 Archive/De-Archive Manager, De-Archive Tab

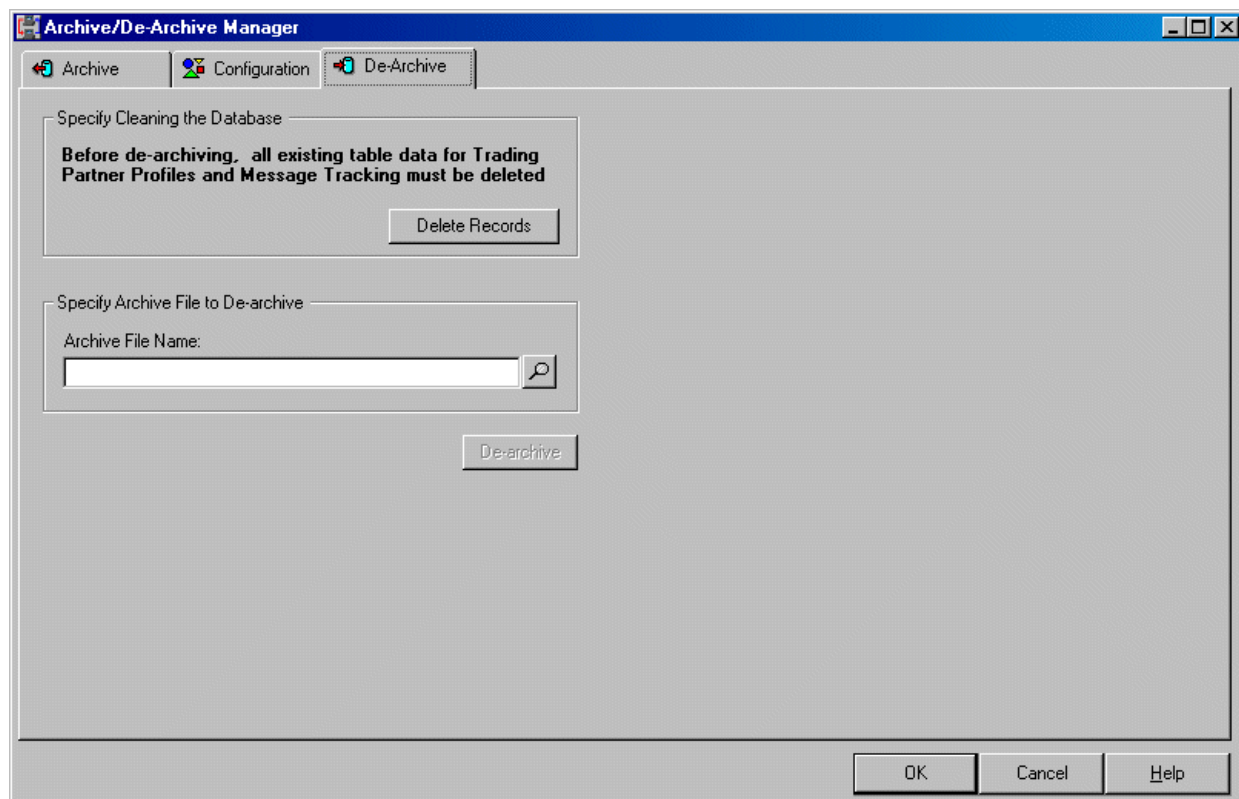


Table 55 Archive/De-Archive Manager, De-Archive Tab

Name	Description
Delete Records	You must click Delete Records before de-archiving the archive file. This ensures that the target database is empty.
Archive File Name	Specify the path for the archive file. Click on the icon to the right to access the Select Archive File dialog box, navigate to the folder if needed, and then choose the file. Note: The archive file name must be the name selected when you originally archived the information. If the archive file has been renamed, the de-archive process will not work.
De-Archive button	Click this button to start the de-archiving operation. When done, e*Xchange displays an information message.
View Log	When the operation is complete, the View Log button appears. Click this button to view the log file.

11.3 Import/Export

You can export data from your e*Xchange Partner Manager to an external file, and you can import information from the external file into another database.

The Import/Export feature allows importing and exporting between different database types; for example, you can take the export file created by exporting from a SQL Server database and import it into an Oracle database.

To set up the import/export feature

- 1 On the **Functions** menu, click **Import/Export**.
The **Import/Export Manager** appears.
- 2 Click the **Configuration** tab (see Figure 108).
- 3 Set the values as needed. For more information, refer to Table 56.
- 4 Click **OK** to save and close, or click another tab to export or import messages.

Figure 108 Import/Export Manager, Configuration Tab

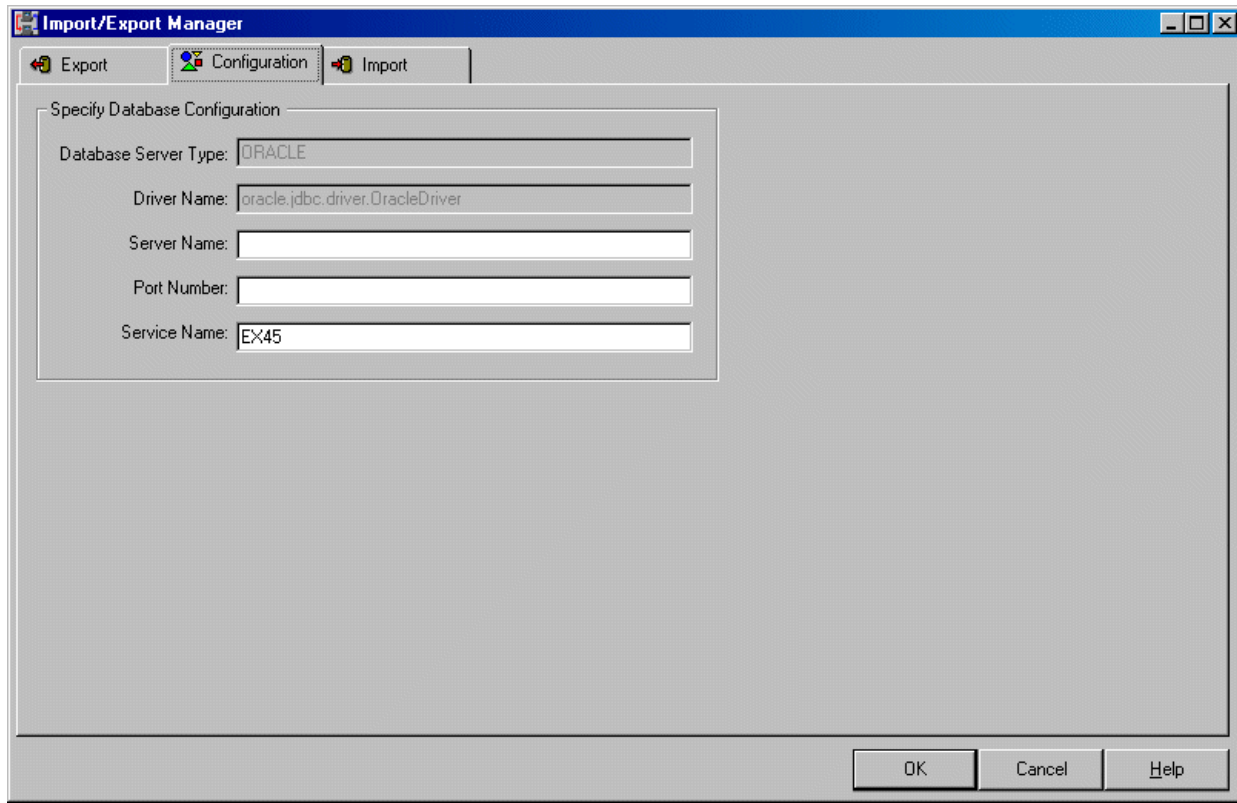


Table 56 Import/Export Manager, Configuration Tab

Name	Description
Database Server Type	The database server type is displayed.
Driver Name	The name of the database driver is displayed.
Server Name (Oracle only)	Type the Oracle server name. This must match the HOST value for the database in the tnsnames.ora file.
Port Number (Oracle only)	Type the port number for Oracle database access. This must match the PORT value for the database in the tnsnames.ora file.
Service Name (Oracle only)	Type the Oracle database service name. This must match the SERVICE_NAME or SID value for the database in the tnsnames.ora file.
ODBC Driver Name (SQL Server and Sybase only)	The name of the SQL Server or Sybase database driver is displayed.

To export information

- 1 On the **Functions** menu, click **Import/Export**.
The **Import/Export Manager** appears.
- 2 On the **Configuration** tab, set the configuration parameters correctly.
For more information, refer to [“To set up the import/export feature” on page 182](#).
- 3 Click the **Export** tab (see Figure 109).
- 4 Set the values as needed. For more information, refer to Table 57.
- 5 Click the **Export** button to start the export operation.
When done, e*Xchange displays an information message.
- 6 Click **OK**.

Figure 109 Import/Export Manager, Export Tab

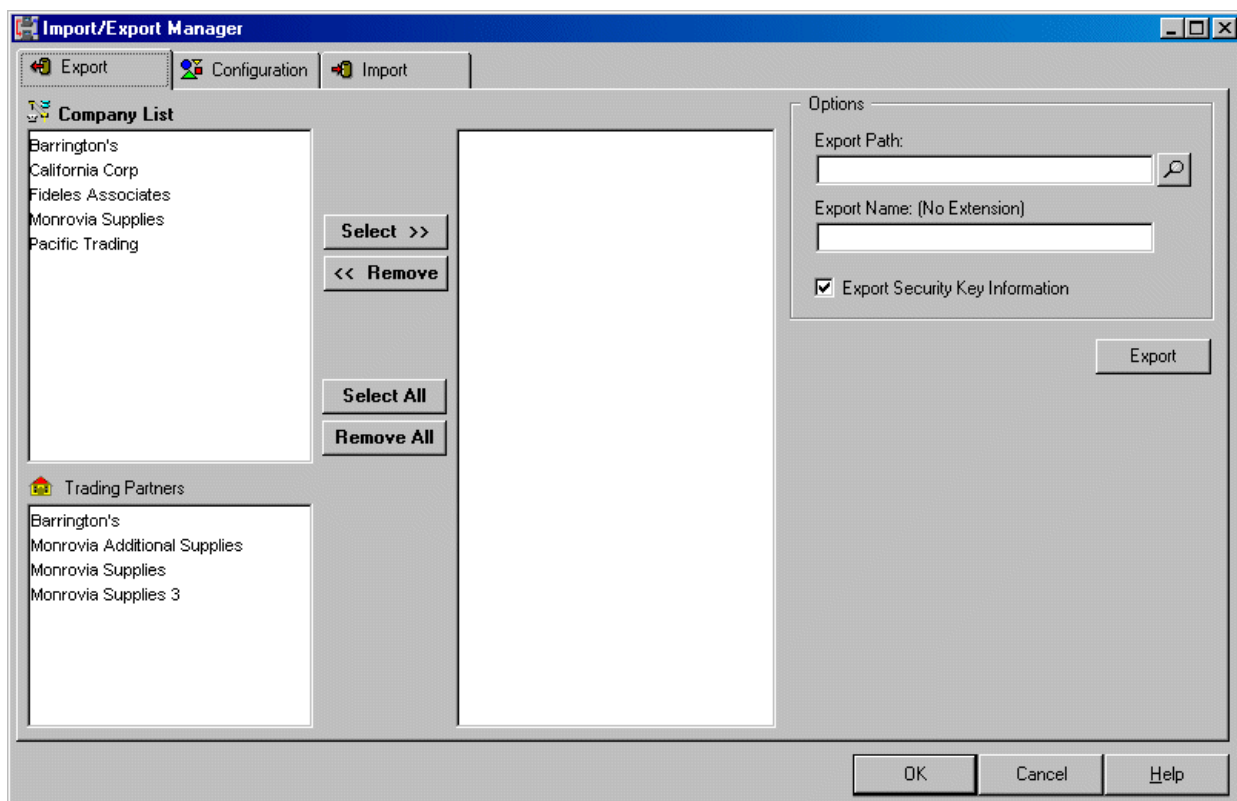


Table 57 Import/Export Manager, Export Tab

Name	Description
Company List	All companies are shown on the list.
Trading Partners list	All trading partners are shown on the list.
Selection Buttons	<p>Use the selection buttons to create a list of companies/trading partners whose messages you want to export, as follows:</p> <ul style="list-style-type: none"> ▪ To select a company and all its trading partners, highlight the company in the left pane, and then click Select. ▪ To select a trading partner and its parent company, highlight the trading partner on the Trading Partners list and then click Select. You can also select multiple trading partners by holding down the Shift or Ctrl keys when selecting. ▪ To remove a company and all its trading partners from the export list, highlight the company in the right pane and then click Remove. ▪ To remove a trading partner from the export list, highlight the trading partner in the right pane and then click Remove. You can also remove multiple trading partners by holding down the Shift or Ctrl keys when selecting. ▪ To select all companies and trading partners from the export list, click Select All. ▪ To remove all companies and trading partners from the export list, click Remove All.
Export Path	<p>Specify the path for the export file. Click on the icon to the right to access the Browse for Folder dialog box, and then choose a folder.</p> <p>Note: make sure there are no spaces in the export path and file name.</p>
Export Name (No extension)	<p>Type the name of the export file, without extension. e*Xchange exports the information to an ASCII file with the extension .exp.</p> <p>Note: make sure there are no spaces in the export path and file name.</p>
Export Security Key Information	Clear this check box if you do <i>not</i> want security key information to be included in the export file. By default, security key information is exported.
Export	Click this button to start the export operation. When done, e*Xchange displays an information message.
View Log	When the operation is complete, the View Log button appears. Click this button to view the log file.

To import information

Note: When you import the information, the associations between messages and responses might not be preserved. When you have imported, check the Return Inner Envelope settings to ensure the correct return inner envelopes are selected.

- 1 On the **Functions** menu, click **Import/Export**.
The **Import/Export Manager** appears.
- 2 On the **Configuration** tab, set the configuration parameters correctly.
For more information, refer to [“To set up the import/export feature” on page 182](#).
- 3 Click the **Import** tab (see Figure 110).
- 4 Set the values as needed. For more information, refer to Table 58.
- 5 Click the **Import** button to start the import operation.
When done, e*Xchange displays an information message.
- 6 Click **OK**.

Figure 110 Import/Export Manager, Import Tab

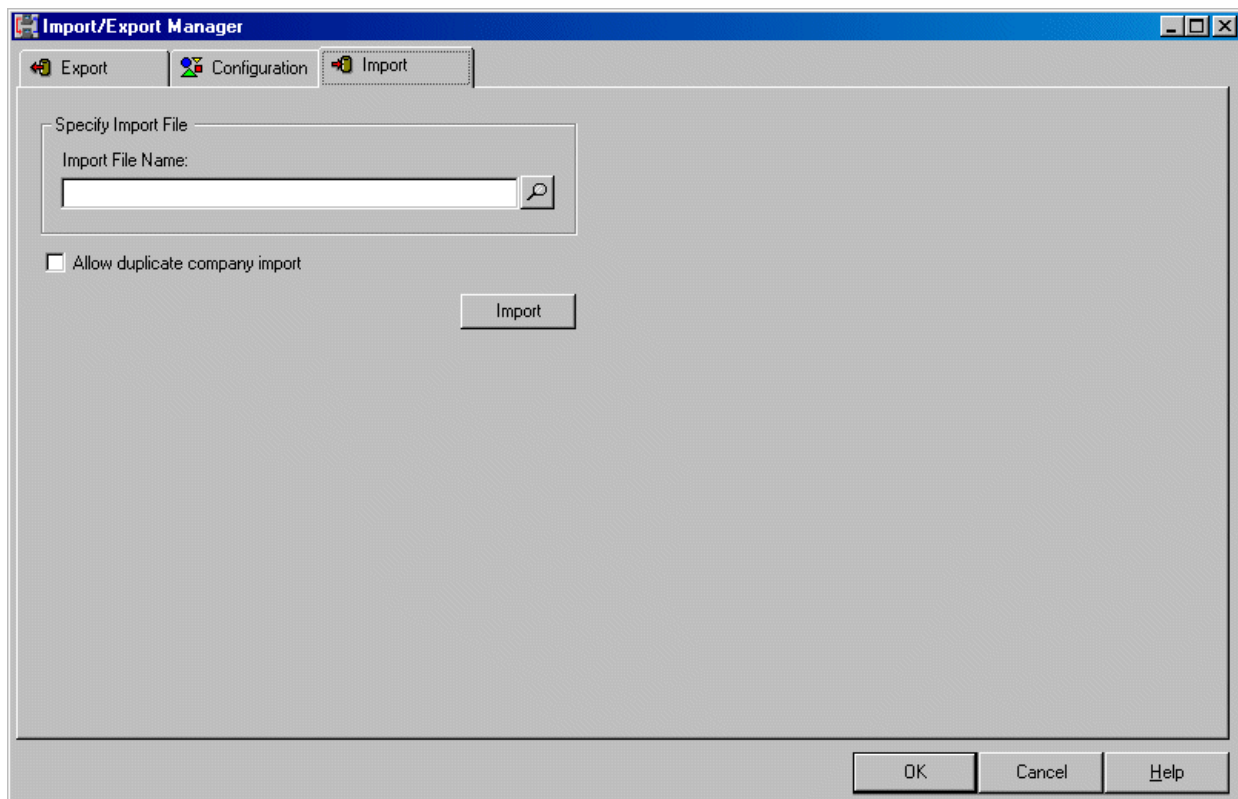


Table 58 Import/Export Manager, Import Tab

Name	Description
Import File Name	Specify the path for the file to be imported. Click on the icon to the right to access the Select Import File dialog box, navigate to the folder if needed, and then choose the file.
Allow duplicate company import	This check box controls whether duplicate information will be imported. If the import file contains components already in the database, and you want to import the duplicate information, check this check box. e*Xchange appends a unique ID to the company name for any duplicates that are imported. Leave this check box clear to skip the duplicates when importing.
Import button	Click this button to start the import operation. When done, e*Xchange displays an information message.
View Log	When the operation is complete, the View Log button appears. Click this button to view the log file.

11.4 Partner Manager Envelope Setup

e*Xchange Partner Manager comes with a set of extended attributes for each version of each supported eBusiness protocol. The extended attributes provide a place for you to set the values that will enable the message to be correctly relayed and interpreted; for example, the Sender ID for X12 and the RNIF Version Identifier for RosettaNet.

Although these attributes have already been set up, and some default values provided, you can set other defaults, specific to your installation, as part of setup.

You can set or change the values for extended attributes at three levels:

Partner Manager Envelope Setup—Used if the defaults are likely to apply everywhere in your system; for example, your Sender ID.

Inner Envelope Definition Setup—Used if the defaults are likely to apply to all instances of a specific message type, regardless of the trading partner. If you did not set a default value in **Partner Manager Envelope Setup**, you can set it here. If you did set a default, you can override it here.

On the **Extended** tab for the outer or inner envelope—Set values on this tab for the specific envelope level and trading partner. Whether or not you set defaults at an earlier stage, you can set or edit the value when you create (or edit) the actual envelope.

To work with **Partner Manager Envelope Setup**, you must be logged on as a member of the eX Administrator group.

To set or change default extended attribute values

- 1 On the **Functions** menu, point to **System Administration**, and then click **Partner Manager Envelope Setup**.

The **Partner Manager Envelope Setup** dialog box appears (see Figure 111).

- 2 In the left pane, select the outer envelope or inner envelope for which you want to set default attribute values. Outer envelopes are listed at the top; scroll down to see the inner envelopes.

Note: Two profiles might have the same name if one is for an outer envelope and the other is for an inner envelope. Make sure you select the profile for the correct envelope layer before continuing to the next step.

- 3 On the **General** tab, in the **Default Value** column, set the default attribute values as needed for your business. Do not change any of the other values. For more information, see Table 59.

Any defaults set will appear in Inner Envelope Definition Setup and in any new envelopes that are based on this profile, but can be changed if needed.

- 4 Click **Apply** to validate and save the new values.
- 5 Click **OK** to close the **Partner Manager Envelope Setup** dialog box.

Figure 111 Partner Manager Envelope Setup (Changing Default Attributes)

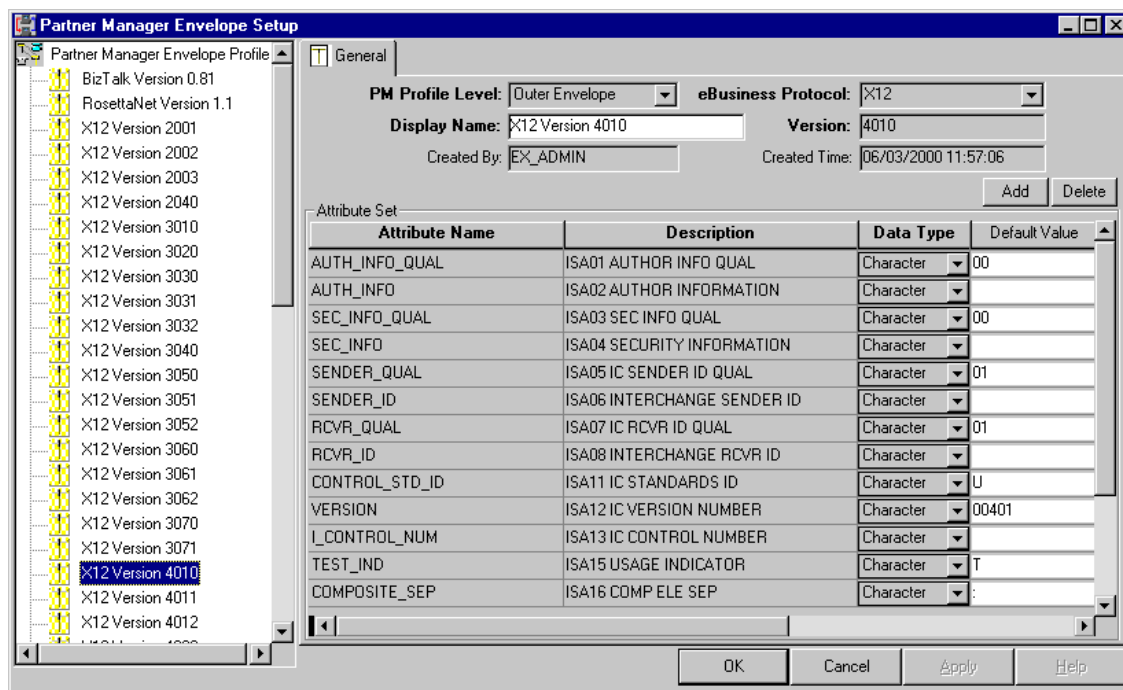


Table 59 Partner Manager Envelope Setup Fields

Name	Description
PM Profile Level	The trading partner profile level: Company, Trading Partner, Outer Envelope, or Inner Envelope. Components are sorted first by type and then by name, so you will have to scroll down to select an inner envelope.

Table 59 Partner Manager Envelope Setup Fields (Continued)

Name	Description
eBusiness Protocol	(For outer and inner envelopes) The eBusiness protocol that you are using; for example, BizTalk, RosettaNet, UN/EDIFACT, or X12.
Display Name	The name of the profile as it appears in the e*Xchange Partner Manager.
Version	(For outer and inner envelopes) The version of the eBusiness protocol that applies to this profile; for example, 4010 for X12 or 1.1 for RosettaNet.
Created By	The user ID of the person who created the profile is displayed.
Created Time	The time at which the profile was created is displayed.
Attribute Set	<p>The attributes for this version of the outer or inner envelope. Each attribute includes the following:</p> <p>Attribute Name—The name of the attribute is displayed.</p> <p>Description—A description of the attribute is displayed.</p> <p>Data Type—The data type of the attribute (Boolean, character, date, datetime, integer, or time) is displayed.</p> <p>Default Value—To set a default value for this attribute, type the value. The default applies to all instances of the attribute for that eBusiness protocol version, although the default can be changed at a later level.</p> <p>Min Size—The minimum number of characters allowed for this attribute.</p> <p>Note: Do not change this value for existing attributes.</p> <p>Max Size—The maximum number of characters allowed for this attribute.</p> <p>Note: Do not change this value for existing attributes.</p> <p>Required—A value is displayed indicating whether the attribute is required or not.</p> <p>Created By—The user ID of the person who last saved the attribute.</p> <p>Created Time—The date and time the default attribute value was last saved.</p>

11.5 Working With Inner Envelope Definitions

An inner envelope definition is a set of parameters you specify for each unique message type you process with e*Xchange Partner Manager. This window allows you to specify default values for each eBusiness message. The inner envelope definition also associates the Validation Collaboration that is needed to validate the message.

As part of Inner Envelope Definition Setup you must do the following:

- Create a separate inner envelope definition for each eBusiness protocol version that you will be using. Once the definition is in place, you will be able to create trading partner profile inner envelopes for that protocol version.
- Create one inner envelope definition for each message you intend to send or receive as a request or inquiry to or from a trading partner, and one inner envelope for each message you intend to send or receive as an acknowledgment or response to or from a trading partner.

- ♦ For each eBusiness protocol version that you will be using, set default attribute values.
- ♦ For each eBusiness protocol version that you will be using, define the specific messages that you will use, with the validation Collaboration and attribute values of each.

You must set up messages separately for each eBusiness protocol you will be using.

Part of defining the inner envelope definition is specifying the validation Collaboration, if applicable. You can either select from the list, or type in the validation Collaboration name.

If you are using a validation Collaboration, you can create it in either of the following ways:

- With the Validation Rules Builder (see [Appendix B](#))
- With the e*Gate Collaboration Editor. Once you have created the validation Collaboration, you must promote it to runtime.

Once set up, the validation Collaborations are available for selection when setting up trading partner information.

11.5.1 Creating Inner Envelope Definitions

Once you have set the defaults for your extended attributes, the next step is to set up each type of eBusiness message that you will be using, for each protocol version in use at your installation.

In the **Inner Envelope Definition Setup** dialog box you have the opportunity to override the defaults you set in **Partner Manager Envelope Setup**, if desired. Defaults set in **Inner Envelope Definition Setup** are carried forward to any inner envelopes you set up that reference the specific transaction description/validation Collaboration combination.

You must finish this step before setting up the actual trading partners, outer envelopes, and inner envelopes.

To create or edit inner envelope definitions, you must be a member of the eX Administrator group.


Note: *The default values that you set here are applied to future trading partner profiles only. Changes made in **Partner Manager Envelope Setup** or **Inner Envelope Definition Setup** to the default values do not affect existing trading partner profiles.*

To add an eBusiness message type for an eBusiness protocol version

- 1 On the **Functions** menu, point to **System Administration**, and then click **Inner Envelope Definition Setup**.

The **Inner Envelope Definition Setup** dialog box appears (see [Figure 112 on page 192](#)).

- 2 In the left pane, select the eBusiness protocol version.

- 3 Click the **Details** tab.
- 4 Click **Add** .
- 5 Define new inner envelope message types for this outer envelope, as follows:
 - ♦ Enter a description of the inner envelope message.
 - ♦ Choose or type the name of the validation Collaboration that you want to use to process messages of this type.
 - ♦ Click **Apply** to validate and save the new values.
- 6 Optional: add extended attributes, as follows:
 - ♦ Select the item on the list for which you want to set default extended attributes.
 - ♦ In the **Available Attributes** box, highlight an attribute name.
 - ♦ Click **Add**. The attribute appears in the **Current Attributes** box.
 - ♦ In the **Data Value** box, type the value for the attribute.
 - ♦ Click **Apply**.
 - ♦ Repeat as needed to add additional extended attributes.
- 7 Optional: set or modify default extended attribute values, as follows:
 - ♦ Select the item to be modified.
 - ♦ In the **Current Attributes** group box, in the **Data Value** box, type the default attribute value.
 - ♦ Click **Apply**.
- 8 Repeat steps 4 through 7 for each inner envelope message type.
- 9 Click **OK** to save and close.

To set up detailed information for predefined inner envelope definitions

- 1 On the **Functions** menu, point to **System Administration**, and then click **Inner Envelope Definition Setup**.

The Inner Envelope Definition Setup dialog box appears (see Figure 112).
- 2 In the left pane, select the eBusiness protocol version.
- 3 Click the **Details** tab.
- 4 On the **Details** tab (see [Figure 113 on page 193](#)), highlight the message type to be edited. You can change the Description and Validation Collaboration; you can also add, edit, or delete Current Attributes. For more information, see [Table 61 on page 193](#).
- 5 Click **Apply** to save the new information, and **OK** to close the Inner Envelope Definition Setup dialog box.

Figure 112 Inner Envelope Definition Setup, General Tab

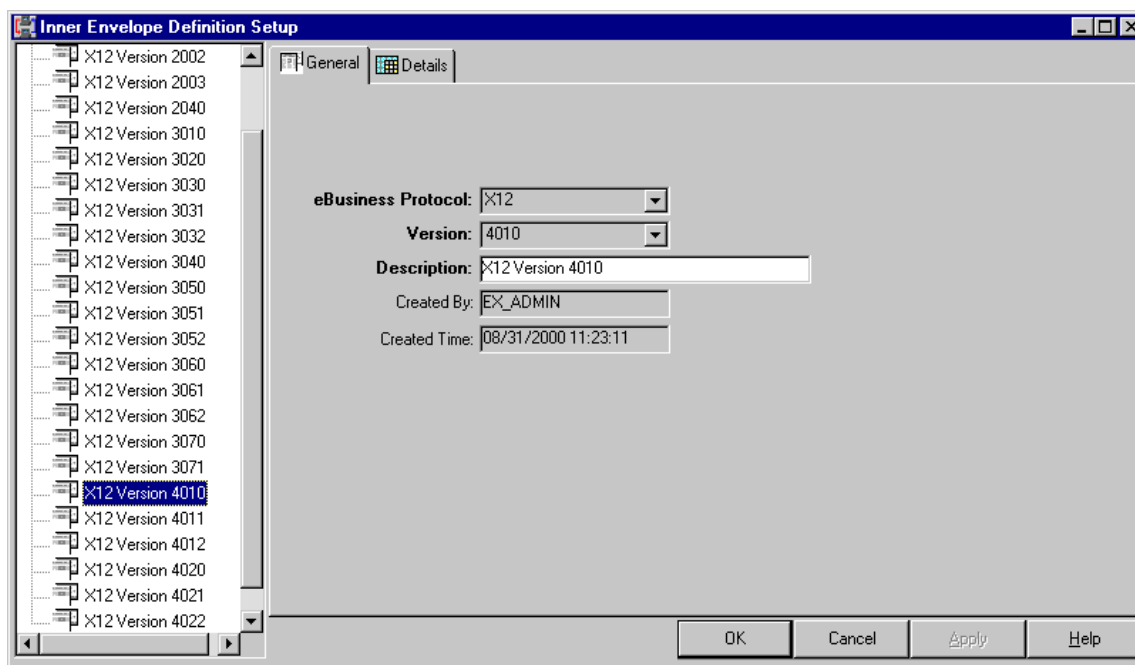


Table 60 Inner Envelope Definition Setup, General Tab, Fields

Name	Description
eBusiness Protocol	The eBusiness protocol; BizTalk, RosettaNet, UN/EDIFACT, or X12.
Version	The version number of the eBusiness protocol that applies to this type of message. The values that appear in this drop-down list are determined by the eBusiness protocols and versions defined on the Partner Manager Envelope Setup dialog box.
Description	The description of this inner envelope definition is displayed.
Created By	The user ID of the person who created the inner envelope definition is displayed.
Created Time	The date and time the inner envelope definition was created is displayed.

Figure 113 Inner Envelope Definition Setup, Details Tab

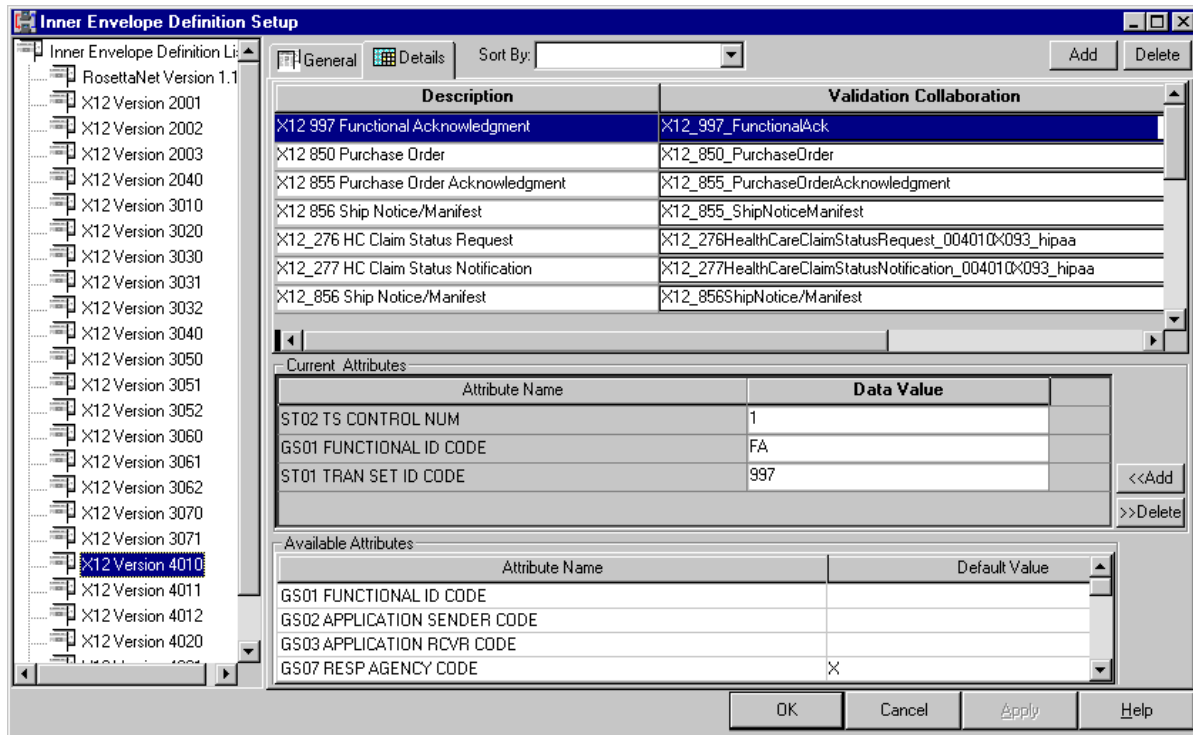


Table 61 Inner Envelope Definition Setup, Details Tab, Fields

Name	Description
Sort By	The value by which you want to sort the list of message types. Choices: Description or Validation Collaboration.
Add button	To add a message to the list, click Add .
Delete button	To delete a message from the list, highlight it, and then click Delete .
Description	A description of the message type.
Validation Collaboration	The name of the validation Collaboration you created for this message. You can type a name or select from the drop-down list.
Created By	The user ID of the person who last saved the inner envelope definition is displayed.
Created Time	The date and time the inner envelope definition was updated or saved is displayed.
Current Attributes	Any attributes currently specified for the highlighted message type are listed. You can set a default data value for any of these, override an existing default value, or delete an attribute. Default values for the attributes can be set up in Partner Manager Envelope Setup . For more information, see “Partner Manager Envelope Setup” on page 187 .

Table 61 Inner Envelope Definition Setup, Details Tab, Fields (Continued)

Name	Description
Available Attributes	The attributes available for selection to the inner envelope, as preloaded during e*Xchange installation, are listed. You can add any of these attributes to the inner envelope definition by highlighting the attribute and then clicking the Add button.

11.6 Working With Message Tracking Attributes

Message tracking attributes are unique values, or combinations of values, used to identify a specific message stored in the e*Xchange Partner Manager database. These are the specific enveloping values required for the eBusiness protocol: for example, I_CONTROL_NUM for X12, IC_CONTROL_REF for UN/EDIFACT, or MSG_TRACKING_ID for RNIF 2.0.

11.6.1 Creating and Editing Message Tracking Attributes

The system comes with predefined attributes. It is important that you do not change these. However, to accommodate possible future changes in the database, the system offers the flexibility of adding new attributes when needed.


You can also edit existing message tracking attribute sets. This is not recommended for most instances; but if you do modify existing default attributes or add new attributes, this must be accompanied by the relevant changes to the Monk Collaborations that perform the message handling in the eX_ePM e*Way.

Note: To access message tracking attributes, you must be a member of the eX Administrator group.

To create a new message tracking attributes set

- 1 On the **Functions** menu, point to **System Administration**, and then click **Message Tracking Attributes Setup**.

The **Message Tracking Attributes Setup** dialog box appears (see Figure 114).

- 2 On the e*Xchange Partner Manager Toolbar, click **New** .
- 3 In the upper portion of the **General** tab, enter general information about the message tracking attributes set (see Table 62).
- 4 For each attribute, click **Add**, and then enter the appropriate information in the Attribute Set fields (see Table 62).
- 5 Click **Apply** to validate and save the new information.
- 6 Click **OK** to close the **Message Tracking Attributes Setup** dialog box.

To edit a predefined message tracking attributes set

- 1 On the **Functions** menu, point to **System Administration**, and then click **Message Tracking Attributes Setup**.

The **Message Tracking Attributes Setup** dialog box appears (see [Figure 114 on page 195](#)).

- 2 In the left pane, select the name of the profile you want to change.

Note: Two profiles might have the same name if one is for an outer envelope and the other is for an inner envelope. Make sure you select the profile for the correct envelope layer (in the **PM Profile Level** display box) before continuing to the next step.

- 3 On the **General** tab, change the default attribute values as needed for your business. Only **Display Name**, **Min Size** and **Max Size** can be changed. For more information, see Table 62.
- 4 Click **Apply** to validate and save the new values.
- 5 Click **OK** to close the **Message Tracking Attributes Setup** dialog box.

Figure 114 Message Tracking Attributes Setup

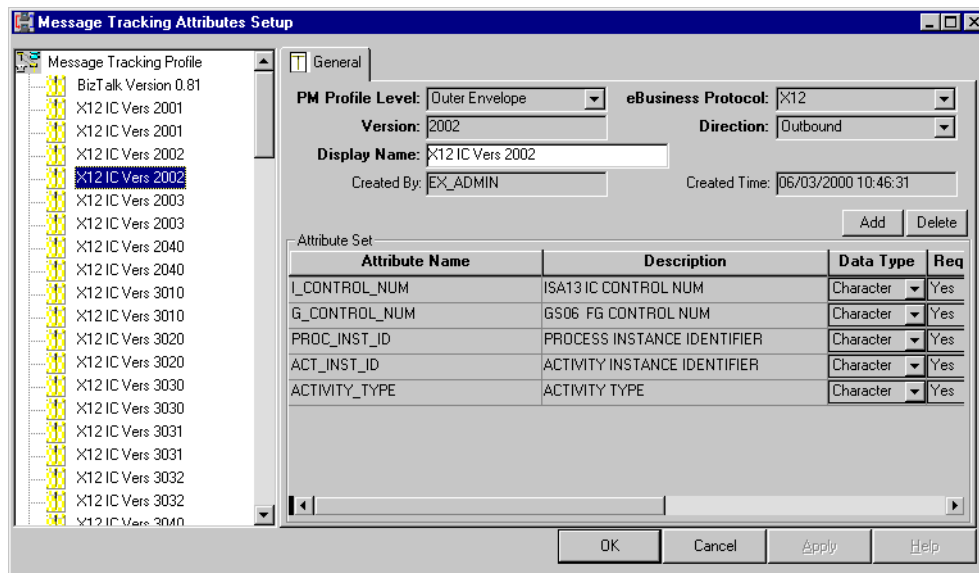


Table 62 Message Tracking Attributes Setup Fields

Name	Description
PM Profile Level	The trading partner profile level: Outer Envelope or Inner Envelope. When viewing an existing profile, this reflects the selection highlighted in the left pane. When adding a profile, select the appropriate level.
eBusiness Protocol	The eBusiness protocol; BizTalk, RosettaNet, UN/EDIFACT, or X12.
Version	The version of the eBusiness protocol.
Direction	The direction (outbound or inbound) of the eBusiness protocol.

Table 62 Message Tracking Attributes Setup Fields (Continued)

Name	Description
Display Name	The name of the profile, as you want it to appear in the e*Exchange Partner Manager. Default: a combination of eBusiness protocol, version, and direction; for example, X12-2001-IC-Inb for X12 version 2001 Interchange inbound.
Created By	The user ID of the person who created the attribute set is displayed.
Created Time	The date and time the attribute set was created is displayed.
Attribute Set	<p>The attributes for the profile. Each attribute includes the following:</p> <p>Attribute Name—The name of the attribute. This is display-only for predefined attributes.</p> <p>Description—A description of the attribute. This is display-only for predefined attributes.</p> <p>Data Type—The data type of the attribute (Boolean, character, date, datetime, integer, or time). This is display-only for predefined attributes.</p> <p>Required—A value indicating whether the attribute is required or not: Yes or No.</p> <p>Default Value—The default value that will appear for this attribute when users define new trading partner profiles.</p> <p>Min Size—The minimum size, in characters, of the default attribute value.</p> <p>Max Size—The maximum size, in characters, of the default attribute value. Setting minimum and maximum size restricts the user, when using this attribute, to appropriate values. This helps prevent user error.</p> <p>Created By—The user ID of the person who last saved the attribute.</p> <p>Created Time—The date and time the default attribute value was last saved.</p>

11.7 Working With Field Lists

The e*Exchange Partner Manager application provides various drop-down selection lists for your use when setting up companies, trading partners, outer envelopes, and inner envelopes. The items available for selection from these lists are determined by the code tables. Code tables do not normally need to be changed. Maintenance and any necessary updating is normally done by the administrator.

11.7.1 Creating and Editing Code Table Values

Most of the code tables are required by the system, and cannot be changed. However, the system allows you to add values to some of the lists, and to edit some of the existing values. For example, the system includes a list of trading partner categories. When adding a new trading partner, you can assign a trading partner to a category; for example, you could set up trading partner categories of Wholesaler, Retailer, and Manufacturer. By going into the code table and adding or changing values, you can change your category list.

Note: To create or edit code tables, you must be a member of the eX Administrator group.

To edit list values

- 1 On the **Functions** menu, point to **System Administration**, and then click **Code Tables**.

The **Code Tables** window appears (see Figure 115).

- 2 In the left pane, select the name of the code table you want to edit. The properties for the selected code table appear in the right pane.

Note: You cannot edit a read-only table or read-only values in any table. Read-only code tables and values are maintained by SeeBeyond because the values affect processing.

- 3 To add a code to the table, click **Add**.
- 4 In the **Code** box, type the code for the new list item.
- 5 In the **Description** box, type a short description of the new list item.
- 6 Click **Apply** to validate and save the new item.
- 7 Repeat steps 3 through 6 as needed until all values have been added to the table.
- 8 Click **OK** to close the Code Tables window.

Figure 115 Code Tables Window

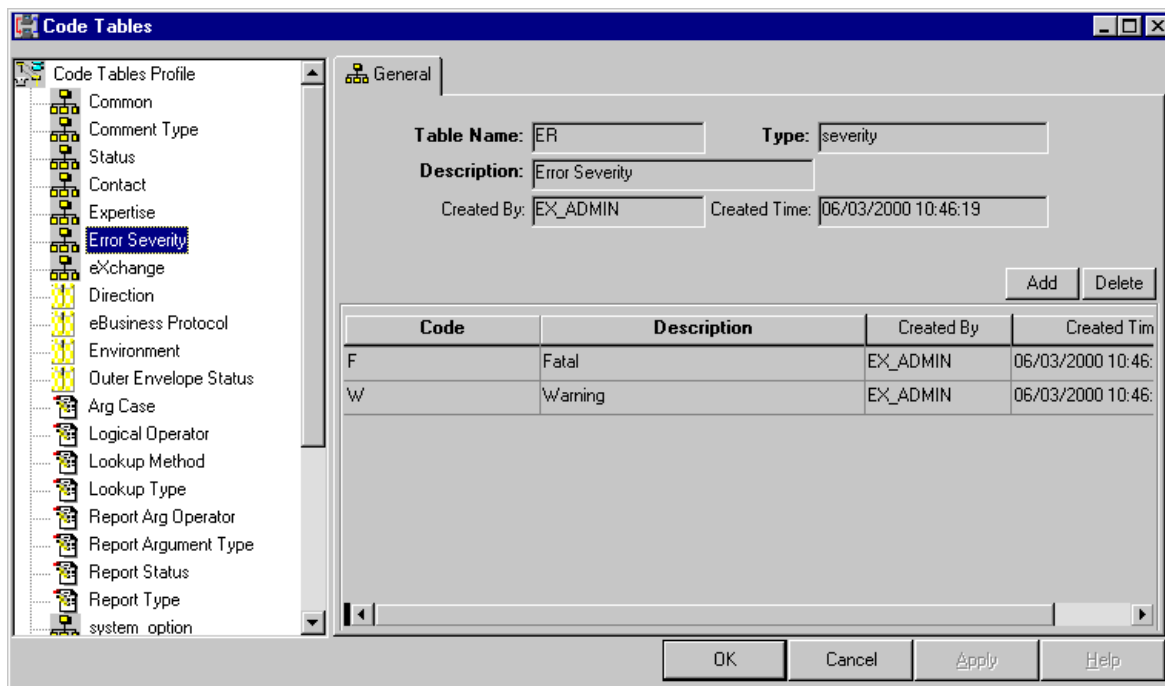


Table 63 Code Tables Window

Name	Description
Table Name	A short name for the code table; for example, the table name for the Error Severity table is ER. The table name must be unique.

Table 63 Code Tables Window (Continued)

Name	Description
Type	A description of the type of table; for example, the type for the Error Severity table is "severity." The table type must be unique.
Description	A short description of the code table. This is the name by which the code table is sorted when it is added to the code tables list and displayed in the left pane.
Created By	The user ID of the person who created the code table is displayed.
Created Time	The date and time the code table was created is displayed.
	Each line in the code table includes the following information: Code —The code assigned to a specific list item. Description —The description of a specific list item. This is the value that will show up on the system list. Created By —The user ID of the person who created this item on the code table. Created Time —The date and time at which this item on the code table was created.

11.8 Working With System Defaults

Before you use e*Xchange Partner Manager, you should verify the default processing options to ensure they are appropriate for your business.

Note: To set system defaults, you must be a member of the eX Administrator group.

To establish system defaults

- 1 On the **Functions** menu, point to **System Administration**, and then click **System Defaults**.

The **System Defaults** dialog box appears (see Figure 116).

- 2 Set default values that are appropriate for your business (see Table 64).

Note: Some values, such as **Idle Shutdown Time** and **FastBatch Timeout**, require e*Xchange Partner Manager to be restarted before the changes come into effect. Others, such as **Display Active Profiles Only**, are updated immediately.

- 3 Click **Apply** to validate and save the system default values.
- 4 Click **OK** to close.

Figure 116 System Defaults

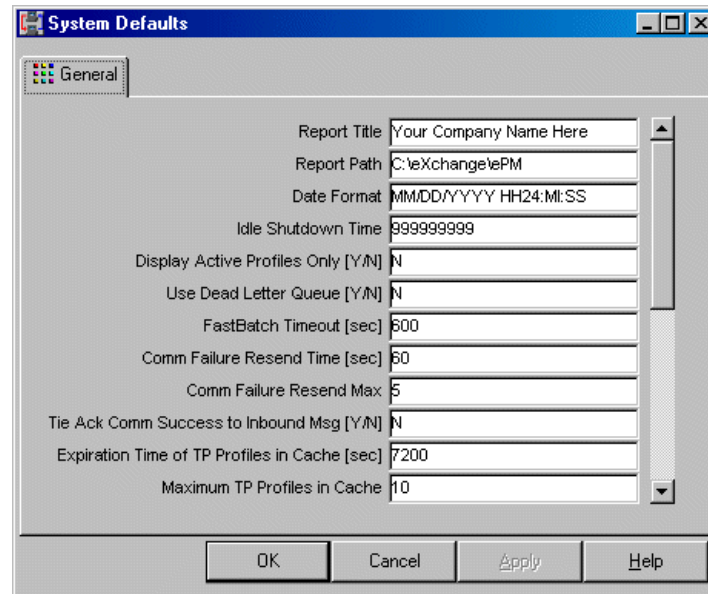


Table 64 System Default Fields

Name	Description
Report Title	The standard title to be listed on all reports generated from the e*Xchange Partner Manager.
Report Path	The name of the drive and folder that contains reports that can be generated from the e*Xchange Partner Manager. Note: Installation includes default reports, stored in the main e*Xchange folder set up during installation. If you accepted the default, this is C:\eXchange\PM . Be sure to update the report path appropriately.
Date Format	(Oracle databases only) The date format used in the database and used for all dates displayed in the e*Xchange Partner Manager. The default is displayed; you can change it to any other date format supported by Oracle.
Idle Shutdown Time	The number of seconds of keyboard or mouse inactivity before the e*Xchange Partner Manager is closed if it is not being used. The default is 999999999 seconds.
Display Active Profiles Only	Select this check box to display only active trading partner profiles in the e*Xchange Partner Manager. If this box is not selected, all trading partner profiles, active or inactive, will be displayed in the left pane of the Partner Manager window.
Use Dead Letter Queue	(X12 only) Set this field to Y to send messages to the Dead Letter Queue if e*Xchange encounters any of the following errors with a message: <ul style="list-style-type: none"> Invalid interchange information in a message from the trading partner Invalid data in the ST/SE segments in a message from the trading partner Duplicate message, either inbound or outbound Note: If you set this to Y , you must create a BOB or e*Way component in the e*Xchange e*Gate schema to subscribe to the eX_Error Event. If set to N , the Dead Letter Queue is not used.

Table 64 System Default Fields (Continued)

Name	Description
FastBatch Timeout	The maximum amount of time that items for a batch will be held before being sent out. As soon as e*Xchange receives all the messages for a batch, the batch is sent out. However, if one or more messages for a specific batch does not reach e*Xchange for any reason (for example, because of errors), the incomplete batch is sent out when the FastBatch Timeout value is reached.
Comm Failure Resend Time	(RosettaNet 2.0 only) For messages sent via HTTP or HTTPS, this controls the resend time for messages if the HTTP or HTTPS post was not successful.
Comm Failure Resend Max	(RosettaNet 2.0 only) For messages sent via HTTP or HTTPS, this controls the number of times a message will be resent if the HTTP or HTTPS post was not successful.
Tie Ack Comm Success to Inbound Message	(RosettaNet 2.0 only) If you set this to Y , e*Xchange Partner Manager stores incoming messages sent by HTTP or HTTPS, sends the acknowledgment back to the trading partner, and waits to ensure that the HTTP or HTTPS post was successful before sending the message on to the internal system.
Expiration Time of TP Profiles in Cache	The amount of time for which a trading partner profile held in memory cache is used before being refreshed. Default: 7200 seconds (2 hours). If you do not want TP profiles to be cached in memory, set this value to 0. If you do not want TP profiles to be refreshed at all once cached in memory for the session, set this value to -1.
Maximum TP Profiles in Cache	The maximum number of trading partner profiles to be held in memory. If a greater number of trading partner profiles is accessed during one session, the profile that has been in memory longest is discarded. Caching of trading partner profiles speeds up performance by reducing interaction with the database. Default: 10. If you want all profiles to be stored in cache, with no upper limit, set this value to 0 and ensure that a valid expiration time is set for Expiration Time of TP Profiles in Cache .
Default Tablespace	For Oracle database only: the default location where database objects will be created for the user if not explicitly defined in the Create statement in the database installation script (this is assigned to database users).
Temp Tablespace	For Oracle database only: the default location where database temporary processing and sorting operations will be performed.
Win GUI - Msg Track retrieval # for warning	The maximum number of messages allowed in e*Xchange Client for Windows for the Message Tracking Details list before e*Xchange provides a warning, allowing the user the option to redefine search criteria to make a smaller list. Note: This setting does not affect the Web interface.
Maximum Batch Individual Transaction Count	For batched transactions only: the maximum number of transactions of one type (for example, X12 850) that can be sent in one batch. Note: Maximum Batch Individual Transaction Count and Maximum Batch File Size work together to ensure batches are not too large. The first of these limits that is reached determines the maximum batch size.

Table 64 System Default Fields (Continued)

Name	Description
Maximum Batch File Size	For batched transactions only: the maximum total file size for one batch. Note: Maximum Batch Individual Transaction Count and Maximum Batch File Size work together to ensure batches are not too large. The first of these limits that is reached determines the maximum batch size.

***Note:** The optimum values for the last two boxes, above, will vary according to the amount of memory available. The more information your system can store in memory, the faster e*Xchange Partner Manager will run, since there is less interaction with the database. If you want to increase performance, experiment with these settings to determine the optimum values.*

11.9 Working With the Error Table

If there is an error in processing a message, e*Xchange Partner Manager assigns one of a number of predefined numerical error codes to the message. For a list of the predefined error codes, see [Table 66 on page 203](#).

These codes come with descriptions in the form of short messages; however, you can change the messages. For example, you could indicate who should be alerted if there is a specific error. Your revised messages will show up in the Message Tracking dialog box if a specific message generates that error.

***Note:** To access the error table, you must be a member of the eX Administrator group.*

To redefine an error message

***Note:** Although you can redefine the default error messages, it is better to leave them as they are unless there is a good reason to change them.*

- 1 On the **Functions** menu, point to **System Administration**, and then click **Error Table**.

The **Error Table** dialog box appears (see Figure 117).

- 2 Highlight the message in the list, and then type the new error description.
- 3 Click **Apply** to validate and save the error message information.
- 4 Click **OK** to close the **Error Table** dialog box.

Figure 117 Error Table

Error Table

Error No:

Description:

Severity:

Created By:

Created Time:

Error List

Error No	Description	Severity	Created By
7	Invalid code value.	Fatal	ex_admin
6	Invalid character in data element.	Fatal	ex_admin
100	Negative acknowledgment sent to TP.	Warning	ex_admin

OK Cancel Apply Help

Table 65 Error Table Fields

Name	Description
Error No	The number that you want to assign to the error message.
Description	The error message description.
Severity	The severity level of the error (Fatal or Warning).
Created By	The user ID of the person who updated the system defaults is displayed.
Created Time	The date and time the system defaults were updated is displayed.

11.9.1 Pre-Set Error Codes

The following types of error codes are used by e*Xchange Partner Manager. They are listed in the tables below, broken down by type:

- [“X12 AK403 \(Data Element Syntax\) Error Codes” on page 203](#)
- [“X12 AK905 \(Functional Group Syntax\) Error Codes” on page 203](#)
- [“X12 TA105 \(Interchange Note\) Error Codes” on page 204](#)
- [“RosettaNet Error Codes” on page 205](#)
- [“Additional Error Codes Used in e*Xchange Partner Manager” on page 206](#)

Note: Only the codes listed in Table 66 can be edited in the **Error Table** dialog box.

Table 66 X12 AK403 (Data Element Syntax) Error Codes

Error Code	Description
1	Mandatory data element missing.
2	Conditional required data element missing.
3	Too many data elements.
4	Data element too short.
5	Data element too long.
6	Invalid character in data element.
7	Invalid code value.
8	Invalid date.
9	Invalid time.
10	Exclusion condition violated.

Table 67 X12 AK905 (Functional Group Syntax) Error Codes

Code	Description
1	Functional group not supported.
2	Functional group version not supported.
3	Functional group trailer missing.
4	Group control numbers in the Functional Group header and trailer do not agree.
5	Number of included transaction sets does not match actual count.
6	Group control number violates syntax.
10	Authentication key name unknown.
11	Encryption key name unknown.
12	Requested service (authentication or encryption) not available.
13	Unknown security recipient.
14	Unknown security organizer.
15	Syntax error in decrypted text.
16	Security not supported.
17	Incorrect message length (encryption only).
18	Message authentication code failed.
23	S3S security end segment missing for S3E security start segment.
24	S3E security start segment missing for S3E security end segment.
25	S3E security end segment missing for S4S security start segment.
26	S3E security start segment missing for S4S security end segment.

Table 68 X12 TA105 (Interchange Note) Error Codes

Code	Description
0	No error.
1	Interchange control numbers in header and trailer do not match.
2	This standard as noted in the control standards identifier is not supported.
3	This version of the controls is not supported.
4	The segment terminator is invalid.
5	Invalid interchange ID qualifier for sender.
6	Invalid interchange sender ID.
7	Invalid interchange ID qualifier for receiver.
8	Invalid interchange receiver ID.
9	Unknown interchange receiver ID.
10	Invalid authorization information qualifier value.
11	Invalid authorization information value.
12	Invalid security information qualifier value.
13	Invalid security information value.
14	Invalid interchange date value.
15	Invalid interchange time value.
16	Invalid interchange standards identifier value.
17	Invalid interchange version ID value.
18	Invalid interchange control number value.
19	Invalid acknowledgment requested value.
20	Invalid test indicator value.
21	Invalid number of included groups value.
22	Invalid control structure.
23	Improper (premature) end-of-file (transmissions).
24	Invalid interchange content (e.g., invalid GS segment).
25	Duplicate interchange control number.
26	Invalid data element separator.
27	Invalid component element separator.
28	Invalid delivery data in deferred delivery request.
29	Invalid delivery time in deferred delivery request.
30	Invalid delivery time code in deferred delivery request.
31	Invalid grade of service code.

Table 69 RosettaNet Error Codes

Code	Description
5005	Invalid Global Administering Authority Code.
5010	Invalid Global Usage Code.
5015	Invalid Date/Time.
5020	Invalid VersionIdentifier.
5025	Invalid Global Process Code.
5030	Invalid Process Indicator Code.
5035	Invalid From Global Business Service Code.
5025	Invalid To Global Business Service Code.
5040	Invalid From Global Partner Role Classification Code.
5040	Invalid To Global Partner Role Classification Code.
5045	Invalid Transaction Code.
5045	Missing Transaction Code.
5050	Invalid Time To Acknowledge Acceptance.
5055	Invalid Time To Acknowledge Receipt.
5060	Invalid Time To Perform.
5065	Invalid Global Document Function Code.
5070	Invalid Global Business Action Code.
5070	Missing Global Business Action Code.
5075	Invalid From Global Partner Classification Code.
5075	Missing From Global Partner Classification Code.
5080	Invalid To Global Partner Classification Code.
5080	Missing To Global Partner Classification Code.
5085	Invalid Sender Business ID.
5085	Missing Sender Business ID.
5090	Invalid Destination Business ID.
5090	Missing Destination Business ID.
5092	Invalid From Global Partner Classification Code.
5092	Missing From Global Partner Classification Code.
5095	Missing Global Business Signal Code.
5095	Invalid Global Business Signal Code.
5097	Invalid To Global Partner Classification Code.
5097	Missing To Global Partner Classification Code.
6010	eX_ROS_main: Internal error. Unknown signal name <processing error message>.
6020	ux-get-header failed for ack.

Table 69 RosettaNet Error Codes (Continued)

Code	Description
6030	ux-init-trans() failed for ack store_msg: <processing error message>.
6040	eX_Convert_ROSG_to_ContentSig failed.
6050	ex-security-process failed in eX_ROS_main.
6060	ex-security-process failed in eX_ROS_main.
6070	eX_Convert_ContentSig_to_ROS failed.
6080	ux_ack_handler failed.
6090	ux_init_trans failed for ack_handler.
6100	ux_store_msg failed.
6110	event-send-to-egate failed.
6120	ux-init-trans() failed: <processing error message>.
6130	Got Monk exception: <processing error message>.
6140	Got Monk exception <processing error message>.
6160	Got Monk exception <processing error message>.
6170	Got Monk exception <processing error message>.
6180	ex_Convert_ContentSig_To_ROS failed.
6190	ux-dbproc-ros-outb() failed: <processing error message>.
6200	database process failed.
6210	event-send-to-egate failed.
6220	event-send-to-egate failed.
6300	Late or unexpected response.
8000	SetRetryMax: db-sql-fetch failed.
8010	SetRetryMax: db-sql-select failed.

Table 70 Additional Error Codes Used in e*Xchange Partner Manager

Code	Description
1	Invalid control number.
6	Invalid character in data element.
7	Data error in specified position.

11.10 Attribute Value Maintenance

As part of trading partner setup, you must enter values for the various enveloping layers of the eBusiness protocol that you use. These values are set in the Extended Attributes tab at the Outer Envelope and Inner Envelope layers for each trading partner.

Most of the attributes have a predefined range of acceptable values, as defined by the eBusiness protocol. For example, in X12 version 4020, the ISA15 Usage Indicator is T (for Test) or P (for Production); in RosettaNet, the Global Usage Code is Test or Production; in UN/EDIFACT, the Syntax Version is 3 or 4. Some attributes have a long list of acceptable values, or the values have long names; in these cases, selection lists of acceptable values are particularly useful. These acceptable values are set up in Attribute Value Maintenance.

e*Xchange Partner Manager comes with many attributes predefined and their sets of acceptable values already entered. You can add, change, or delete these predefined values. You can also add new attributes and define values for them.

To define a new extended attribute and its list of possible values

- 1 On the **Functions** menu, point to **System Administration**, and then click **Attribute Value Maintenance**.

The **Attribute Value Maintenance** dialog box appears (see Figure 118).

For more information on individual fields, refer to Table 71.


- 2 To add an attribute, click **New** .
- 3 Specify the eBusiness protocol and version.
- 4 In the **Attribute Proper Name** box, enter the attribute as it is referenced in the documentation for the eBusiness protocol.
- 5 Enter the minimum size and maximum size for the attribute.
- 6 If needed, add aliases for the attribute.
- 7 Under **Attribute Values**, add a line for each possible value of the attribute.
- 8 Click **OK** to save and close.

Figure 118 Attribute Value Maintenance

Table 71 Attribute Value Maintenance Fields

Name	Description
PM Profile Level	The trading partner profile level to which the attribute applies: Company, Trading Partner, Outer Envelope, or Inner Envelope.
eBusiness Protocol	The eBusiness protocol to which the attribute applies; BizTalk, RosettaNet, UN/EDIFACT, or X12.
Version	The version of the specified eBusiness protocol to which the attribute applies.
Attribute Proper Name	The standard name of the attribute, by which it is known in the documentation for the eBusiness protocol.
Min Size	The minimum number of characters allowed for this attribute. Note: Do not change this value for existing attributes.
Max Size	The maximum number of characters allowed for this attribute. Note: Do not change this value for existing attributes.

Table 71 Attribute Value Maintenance Fields (Continued)

Name	Description
Attribute Alias	<p>If the same list of values is applicable to more than one extended attribute, you can set up aliases for the attribute as needed. For example, in RosettaNet, the set of values applying to the Global Partner Classification Code is used in the <i>from</i> and <i>to</i> attributes. By setting up an alias, you maintain only one list and cross-reference the other attributes to that list.</p> <ul style="list-style-type: none">▪ To add an alias, click the Add button, and then enter the alias name.▪ To change an alias, highlight it, and then enter the new information.▪ To delete an alias, highlight it, and then click the Delete button.
Attribute Value	<p>The list of acceptable values for the attribute.</p> <ul style="list-style-type: none">▪ To add a new value, click the Add button, and then enter the value.▪ To change a value, highlight it, and then enter the new information.▪ To delete a value, highlight it, and then click the Delete button.

Storing Contact Information

You can use e*Xchange Client for Windows to store information about the people you might need to contact in connection with the processing of messages to and from a specific trading partner.

For example, you could list your support contact at the trading partner's site. If there is one contact, you might store it at the company or trading partner level; if there is more than one contact you could store the information at different levels. For example, if there is a contact for certain transactions, you could store that information at the inner envelope level.

12.1 About the Contacts Feature

You can store contact information at the following levels:

- Company
- Trading Partner
- Outer Envelope
- Inner Envelope
- Reports

You can store information for up to four contacts per component:

- Primary Client Contact
- Secondary Client Contact
- Primary Internal Contact
- Secondary Internal Contact

Contact information is optional. You can add it when setting up a component for the first time, or at any point afterwards.

When you are setting up contacts for a subcomponent and have already set up contacts at a higher level, you can copy the contact information to the lower level. For example, if you already recorded a contact at the Trading Partner level and are setting up an outer envelope, e*Xchange offers you the option of copying the contact information from the Trading Partner level.

The procedures below explain how to perform various activities relating to contact information. The **Contacts** tab works the same at all levels.

12.2 Working With Contacts

This section includes instructions for carrying out the following activities:

- Entering contacts when adding a new component: see [“Adding Contacts to a New Component” on page 211](#)
- Adding contacts to an existing component: see [“Adding Contacts to an Existing Component” on page 213](#)
- Updating existing contact information: see [“Changing Contact Information” on page 214](#)
- Deleting contacts: see [“Deleting Contact Information” on page 214](#)
- Copying contact information from an existing component: see [“Copying Contacts” on page 215](#)

12.2.1 Adding Contacts to a New Component

You can store information for up to four contacts per component.

To enter contacts when adding a new component

- 1 With the **New [Company, Trading Partner, Outer Envelope, or Inner Envelope]** window open, click **Contacts**.

The **Contacts** tab appears, as shown in Figure 119.

- 2 In the **Contact Type** box, select from the drop-down list.
- 3 Enter contact address and other information as needed.

For more information, see Table 72.

- 4 Click **Apply**.

- 5 If you want to add another contact, click **New** , and then repeat steps 2 through 4 above.

Figure 119 Contacts Tab

New Company

General Extended **Contacts** Comments Security

Contact Type: Primary Client Contact

First Name: Jeremy **Last Name:** Johnson

Title: EDI Coordinator **Expertise:** X12

Address Line 1: 1234 Main Street

Address Line 2:

City: Monrovia

State/Province: CA

ZIP/Postal Code: 91016

Country: USA

Phone: (626) 555-5555

Fax: (616) 555-6666

Email: johnson@company.com

Created By: **Created Time:**

Contact List

First Name	Last Name	Address Line 1	Address Line 2
Jeremy	Johnson	1234 Main Street	Monro

OK Cancel Apply Help

Table 72 Contacts Tab Fields

Name	Description
Contact Type	A value that specifies the kind of contact. These values are defined according to your business needs and are maintained by your administrator. Select from the drop-down list.
First Name	The contact's first name.
Last Name	The contact's last name.
Title	The contact's job title.
Expertise	The contact's primary area of knowledge and experience. Select from the drop-down list. These values are defined according to your business needs and are maintained by your administrator.
Address Line 1	The first line of the contact's street address.
Address Line 2	The second line of the contact's street address.
City	The city in which the contact is located.
State/Province	The abbreviation or name of the state in which the contact is located, or the name or code for the province.
ZIP/Postal Code	The ZIP or postal code associated with the contact's street address. You can enter a 5-digit ZIP code, a 9-digit ZIP+4 code, or any other postal code.
Country	The name or abbreviation for the country in which the contact is located.
Email	The contact's e-mail address.
Phone	The telephone number for the contact. Include the area code.
Fax	The fax number for the contact. Include the area code.

Table 72 Contacts Tab Fields (Continued)

Name	Description
Created By	The user ID of the person who added or updated the contact information is displayed.
Created Time	The date and time the contact was added or updated are automatically displayed when the record is saved.
Contact List	When a contact is set up for the company, it is added to the Contact List. To view the information for any pre-existing contact, highlight the contact on the Contact List. The contact information is displayed in the various boxes.

12.2.2 Adding Contacts to an Existing Component

Once a component has been saved, you can add contacts at any time.

To add a contact to an existing component


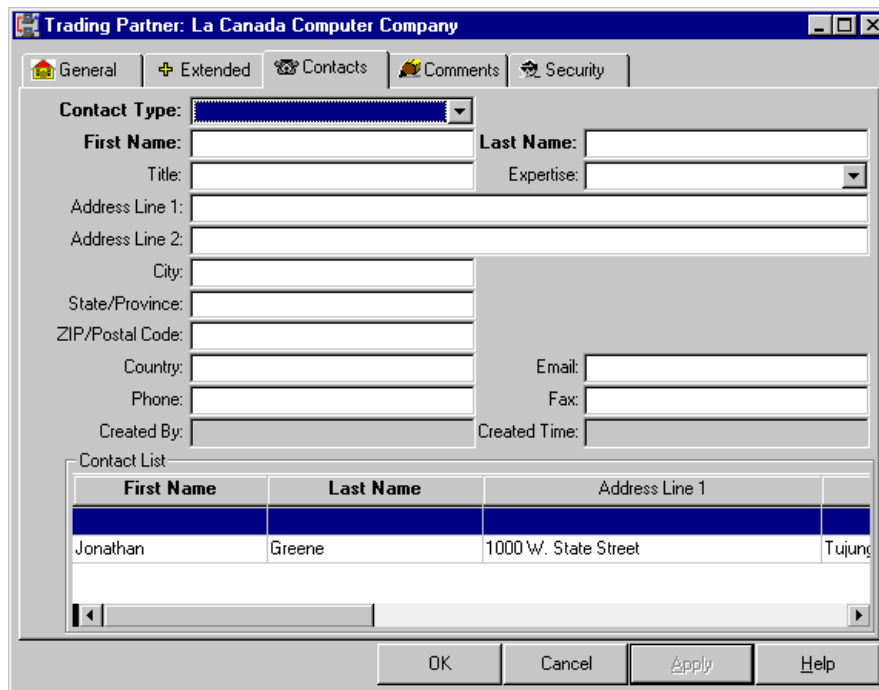
- 1 In the Partner Manager window, highlight the component.
- 2 On the toolbar, click **Properties** .
- 3 Click **Contacts**.
- 4 The **Contacts** tab appears, as shown in Figure 120.

Figure 120 Trading Partner Properties, Contacts Tab (Adding a Contact)



Trading Partner: La Canada Computer Company

General Extended **Contacts** Comments Security

Contact Type: [Dropdown]

First Name: [Text] **Last Name:** [Text]

Title: [Text] **Expertise:** [Dropdown]

Address Line 1: [Text]

Address Line 2: [Text]

City: [Text]

State/Province: [Text]

ZIP/Postal Code: [Text]

Country: [Text] **Email:** [Text]

Phone: [Text] **Fax:** [Text]

Created By: [Text] **Created Time:** [Text]

Contact List

First Name	Last Name	Address Line 1	
Jonathan	Greene	1000 W. State Street	Tujunga

OK Cancel Apply Help

- 5 Click **New** .

The values are cleared so that you can enter information about the new contact. Any pre-existing contacts are displayed on the Contact List.

- 6 Enter contact address and other information as needed.


For more information, see [“Contacts Tab Fields” on page 212](#).

- 7 Click **Apply** to validate and save the new contact.
- 8 Repeat steps 5 through 7 as needed to add more contacts.
- 9 Click **OK** to close the **Properties** dialog box.

12.2.3 Changing Contact Information

You can update contact information at any point, as needed.


To update contact information


- 1 In the Partner Manager window, highlight the component.
 - 2 On the toolbar, click **Properties** .
- The **Properties** dialog box for the selected component appears.
- 3 Click **Contacts**.
 - 4 The **Contacts** tab appears.
 - 5 On the Contact List at the bottom of the **Contacts** tab, highlight the contact to be edited.
 - 6 Change any editable values as needed.
- For more information, see [“Contacts Tab Fields” on page 212](#).
- 7 Click **Apply** to validate and save the changed contact information.
 - 8 Click **OK** to close the **Properties** dialog box.

12.2.4 Deleting Contact Information

You can delete contacts that are no longer valid or no longer needed.

To delete a contact from a component

- 1 In the Partner Manager window, highlight the component.
 - 2 On the toolbar, click **Properties** .
- The **Properties** dialog box for the selected component appears.
- 3 Click **Contacts**.
 - 4 The **Contacts** tab appears.

- 5 For each contact you want to delete, click the appropriate name at the bottom of the **Contacts** tab, and then click **Delete** .
The contact is deleted.
- 6 Click **Apply** to validate and save the deletion.
- 7 Click **OK** to close the **Properties** dialog box.

12.2.5 Copying Contacts

To save time, you can copy contact information from a component that you have already added to a component directly below it. You can copy contacts:

- From a company to a trading partner
- From a trading partner to an outer envelope
- From an outer envelope to an inner envelope

Once you have copied the information, you can modify it as needed.

To copy contact information from an upper component level to a lower level


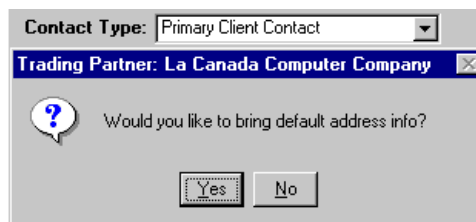
- 1 In the Partner Manager window, highlight the component.
- 2 On the toolbar, click **Properties** .
The **Properties** dialog box for the selected component appears.
- 3 Click **Contacts**.
- 4 The **Contacts** tab appears.
- 5 In the **Contact Type** box, choose the kind of contact you want to copy.
A prompt appears, as shown in Figure 121.

Figure 121 Copy Contacts Prompt



- 6 Click **Yes**.
- 7 Modify the copied contact information if needed.
- 8 Click **Apply** to validate and save the new contact information.
- 9 Click **OK** to close the **Properties** dialog box.

Tracking Notes and Action Items

You can use e*Xchange Client for Windows to store supplemental information at each component level via the **Comments** tab.

You can include two types of information:

- Notes—You can record multiple notes, stored as free-form text.
- Action Items—You can record and track action follow-up items. Each item shows what needs to be done, its status, to whom it is assigned, and the due date. When the action item has been completed, you can record the resolution and close the action item.

13.1 Working With Notes and Action Items

You can store notes and action items at the following levels:

- Company
- Trading Partner
- Outer Envelope
- Inner Envelope
- Reports

The procedures below explain how to enter new notes and action items. The **Comments** tab works the same at all component levels.

This section includes instructions for carrying out the following activities:

- Adding a new note: see [“Entering Notes” on page 217](#)
- Adding a new action item: see [“Entering Action Items” on page 218](#)
- Add another note: see [“Adding Notes to an Existing Component” on page 219](#)
- Add another action item: see [“Adding Action Items to an Existing Component” on page 220](#)
- Change information about existing notes and action items: see [“Changing Notes and Action Items” on page 221](#)
- Convert a note into an action item, or an action item into a note: see [“Converting Notes and Action Items” on page 221](#)

- Delete a note or an action item: see [“Deleting Notes and Action Items” on page 222](#)
- Mark action items as complete: see [“Responding to Action Items” on page 222](#)

13.1.1 Entering Notes

You can store multiple notes, with a paragraph of free-form text for each.

To enter notes when adding a new component


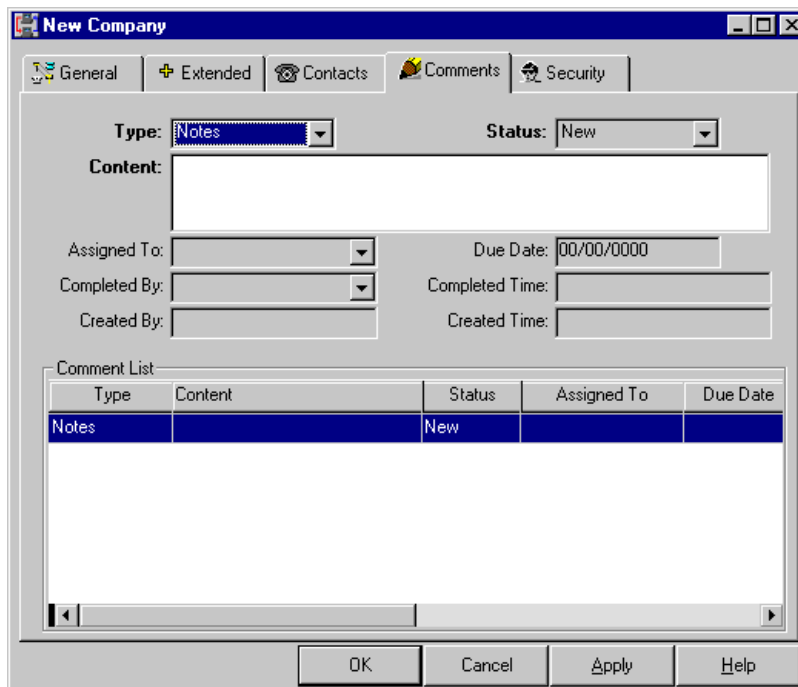
- 1 With the **New [Component]** window open, click **Comments**.
The **Comments** tab appears (see Figure 122).
- 2 In the **Type** box, select **Notes** (see Figure 122).
- 3 In the **Content** box, enter additional information as needed.
For more information, see Table 73.
- 4 Click **Apply** to save.
The comment is added to the Comment List.
- 5 If you want to add another note, click **New** , and then repeat steps 2 through 4 above.

Figure 122 New Company, Comments Tab (Notes)



New Company

General Extended Contacts **Comments** Security

Type: **Notes** Status: **New**

Content:

Assigned To: Due Date: 00/00/0000

Completed By: Completed Time:

Created By: Created Time:

Comment List

Type	Content	Status	Assigned To	Due Date
Notes		New		

OK Cancel Apply Help

Table 73 Note and Action Item Fields

Name	Description
Type	The type of comment you are creating: Notes —indicates additional information about the component. Action Follow Up —indicates a task to be followed up and completed. Default: Notes .
Status	(Action Items Only) The current status of the action item. The status is always New when you add a new action item. After the action item is saved, you can change this status to either Pending or Completed . Default: New .
Content	The text of the note, or a description of the follow-up task. This is free-form, allowing up to 255 characters of text.
Assigned To	(Action Items Only) The name of the person to whom you want to assign the task. Actions assigned to a particular user (including yourself) are routed to that user and can be viewed on the My Action Items dialog box. For more information, see “Responding to Action Items” on page 222 .
Due Date	(Action Items Only) The date by which the action should be completed. You can click the Search button next to this box to display a calendar, from which you can choose the date.
Completed By	(Action Items Only) When you change the status of an action item to Completed, you must specify the person who completed the action. At all other times, this is display-only.
Completed Time	(Action Items Only) The date and time an action item was completed. The completion time is recorded as soon as the name of the person who completed the task is specified in the Completed By box.
Created By	The ID of the person who last saved the note or action item.
Created Time	The time at which the note or action item was last saved.
Comment List	A default, blank note is always included in the list. Any notes or follow-up items that have already been recorded are also displayed. For each item, the list includes the following information: Type, Content, Status, Assigned To, Due Date, Completed By, and Completed Time.

13.1.2 Entering Action Items

You can store multiple action items at any component level.

To enter action items when adding a new component

- 1 With the **New [Component]** window open, click **Comments**.
The **Comments** tab appears.
- 2 In the **Type** box, select **Action Follow Up** (see Figure 123).

Figure 123 New Trading Partner, Comments Tab (Action Items)

New Trading Partner

General Extended Contacts **Comments** Security

Type: Action Follow Up Status: New

Content: Call back 7/14/2000

Assigned To: [dropdown] Due Date: 07/14/2000


Completed By: [dropdown] Completed Time: [text box]

Created By: [text box] Created Time: [text box]

Comment List

Type	Status	Content	Assigned To	Due Date
Action Follow Up	New	Call back 7/14/2000		07/14/2000


OK Cancel Apply Help

- 3 In the **Content** box, enter information about the action item.
For more information, see [“Note and Action Item Fields” on page 218](#).
- 4 In the **Assigned To** box, select the ID of the user to whom the action is assigned.
- 5 In the **Due Date** box, specify the date by which the action should be completed.
- 6 Click **Apply** to validate and save the new action item.
- 7 If you want to add another action item, click **New** , and then repeat steps 2 through 6 above.

13.1.3 Adding Notes to an Existing Component

If you do not add notes when you are creating a component, you can go back and add them later.

To add another note

- 1 In the Partner Manager window, highlight the component.
- 2 On the toolbar, click **Properties** .
The **Properties** dialog box for the selected component appears.
- 3 Click **Comments**.
The **Comments** tab appears, as shown in Figure 124.


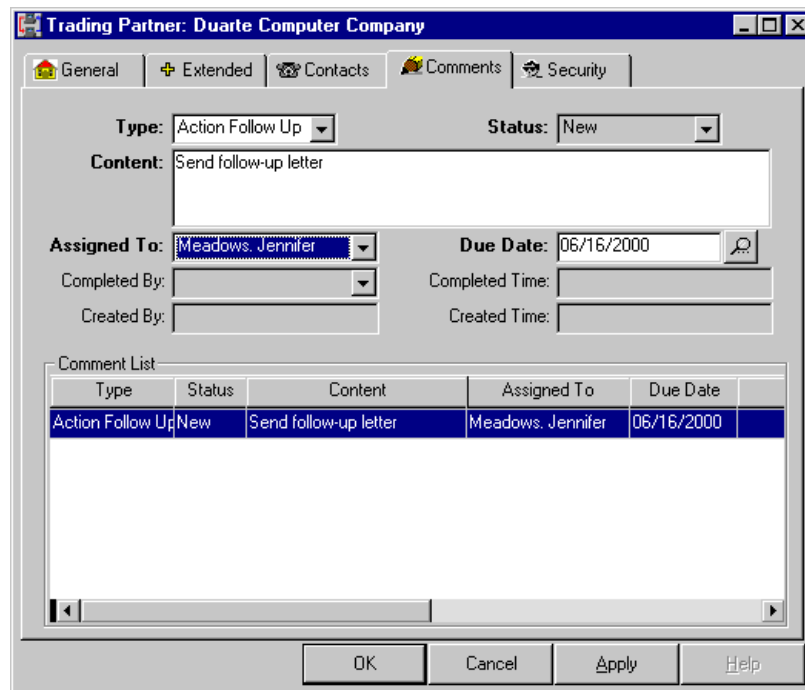
- 4 Conditional: if any notes have already been entered, click **New**  to add a new one.
- 5 In the **Content** box, enter the note.
For more information, see [“Note and Action Item Fields” on page 218](#).
- 6 Click **Apply** to validate and save the new note.
- 7 Click **OK** to close the **Properties** dialog box.

Figure 124 Trading Partner Properties, Comments Tab (Changing a Note or Action Item)





Type	Status	Content	Assigned To	Due Date
Action Follow Up	New	Send follow-up letter	Meadows, Jennifer	06/16/2000

13.1.4 Adding Action Items to an Existing Component

If you do not add action items when you are creating a component, you can go back and add them later.

To add another action item


- 1 In the Partner Manager window, highlight the component.
- 2 On the toolbar, click **Properties** .
The **Properties** dialog box for the selected component appears.
- 3 Click **Comments**.
The **Comments** tab appears, as shown in Figure 124.
- 4 In the **Type** box, select **Action Follow Up**.

- 5 Conditional: if any action items have already been entered, click **New**  to add a new one.
- 6 In the **Content** box, enter information about the action item.
For more information, see [“Note and Action Item Fields” on page 218](#).
- 7 In the **Assigned To** box, select the ID of the user to whom the action is assigned.
- 8 In the **Due Date** box, specify the date by which the action should be completed.
- 9 Click **Apply** to validate and save the new action item.
- 10 Click **OK** to close the **Properties** dialog box.

13.1.5 Changing Notes and Action Items

If necessary, you can modify information about a note or action item that you previously saved. For example, you can change the text of a comment, reassign an action item to another user, or change the due date of an action item.


To change a note or action item

- 1 In the Partner Manager window, highlight the component.
- 2 On the toolbar, click **Properties** .
The **Properties** dialog box for the selected component appears.
- 3 Click **Comments**.
The **Comments** tab appears, as shown in Figure 124.
- 4 Click the appropriate row in the Comment List for the note or action item that you want to update, and then change any editable values as needed. For more information, see [“Note and Action Item Fields” on page 218](#).
- 5 Click **Apply** to validate and save the changed notes or action items.
- 6 If you want to edit another note or action item, repeat steps 4 and 5 as needed.
- 7 Click **OK** to close the **Properties** dialog box.

13.1.6 Converting Notes and Action Items

If necessary, you can convert an existing note into an action item, or you can convert an existing action item into a note.

To convert a note or action item

- 1 In the Partner Manager window, highlight the component.
- 2 On the toolbar, click **Properties** .
The **Properties** dialog box for the selected component appears.
- 3 Click **Comments**.



The **Comments** tab appears, as shown in Figure 124.

- 4 For each note or action item you want to convert, do the following:
 - ♦ Click the appropriate row in the Comment List.
 - ♦ Change the value of the **Type** box to either **Notes** or **Action Follow Up**.
 - ♦ Modify any editable values as needed. For more information, see [“Note and Action Item Fields” on page 218](#).
- 5 Click **Apply** to validate and save the changed note or action item.
- 6 Click **OK** to close the **Properties** dialog box.

13.1.7 Deleting Notes and Action Items

You can delete notes or action items that are no longer needed.

To delete a note or action item

- 1 In the left pane of the Partner Manager window, select the trading partner.
- 2 On the toolbar, click **Properties** .
The **Properties** dialog box for the selected component appears.
- 3 Click **Comments**.
- 4 For each note or action item you want to delete, click the appropriate row in the Comment List, and then click **Delete** .
- 5 Click **Apply** to validate and save the deletion.
- 6 Click **OK** to close the **Properties** dialog box.


13.1.8 Responding to Action Items

Recording the resolution of action items provides a data trail for future reference.

There are two ways to record an action item as complete:

- If you have access rights, you can open up the trading partner profile component and record the action as completed in the **Comments** tab. If you use this method, you can record the resolution of the action item or any other information as needed.
- If you do not have access to the trading partner component, you can still update the status of any action items assigned to you via the My Action Items dialog box. However, if you use this method, you cannot update any of the other values, such as the **Content** text box.

To respond to an action item within the trading partner component

- 1 Highlight the trading partner component, and then click **Properties** .
- 2 Click **Comments**.
- 3 In the Comment List, highlight the action item to be updated.

- 4 If desired, add information about the action item in the **Content** text box.
- 5 If the status of the action item has changed, update the status to reflect either that the action item is being worked on (**Pending**) or that it has been finished (**Completed**).
- 6 If the action item has been completed, enter the name of the person who completed the task.
- 7 Click **Apply** to save and validate the changes.
- 8 Repeat steps 3 through 7 as needed.
- 9 Click **OK** to close.

To respond to an action item in the My Action Items dialog box


- 1 On the toolbar, click **My Action Items** .
The **My Action Items** dialog box appears (see Figure 125).
- 2 Review the information provided by each action item. For more information, see Table 74.
- 3 If the status of an action item has changed, update the status to **Pending** or **Completed**.
- 4 To display the most current set of tasks assigned to you, click **Refresh**.
The list refreshes with any action items assigned to you since you opened the My Action Items dialog box.
- 5 Click **Apply** to save any status changes you make.
- 6 Click **OK** to close.

Figure 125 My Action Items

PM Profile Level	ID	Due Date	Content	Status	Completed By	Completed Time
Company	1	02/22/2000 ***	Call	Pending	ex_admin. ex_adr	04/06/2000 14:30:21 ex
Trading Partner	145	04/14/2000	Get all phone #s and extension...	Pending		ex
Trading Partner	145	04/17/2000	Call in one week to follow up.	New		ex

Buttons: Refresh, OK, Cancel, Apply, Help

Table 74 My Action Items Fields

Name	Description
PM Profile Level	The profile level to which the action item applies: Company, Trading Partner, Outer Envelope, or Inner Envelope.
ID	The ID of the action item.
Due Date	The date by which the action item should be completed. If the due date has expired, three asterisks are displayed next to the date.
Content	Information regarding the action item.
Status	The status of the action item: New, Pending, or Completed.
Completed By	When an action item is marked as completed, the user ID of the person marking it as complete is automatically logged.
Completed Time	When an action item is marked as completed, the date and time at which completion was recorded are automatically logged.
Created By	The user ID of the person who last saved the action item.
Created Time	The date and time at which the action item was last saved.

Assigning Access Privileges to Trading Partner Profiles

When adding a company or a custom report definition in e*Xchange Client for Windows, you must specify the groups or individuals who will have access privileges to the information and what specific access rights they will have. The defining of access privileges is a required setup step, to protect the security of your information.

14.1 What Are Access Control Permissions?

A member of the eX Administrator user group adds companies to e*Xchange and indicates which users and groups can access information associated with each company, and what the specific access rights are (read, add, edit, or full control).

If your administrator has allowed you “Add” access for a particular company, you can add new trading partner components to that company. In addition, you can specify user access rights for all components set up for that company; trading partners, outer envelopes, and inner envelopes.

The following table describes each kind of access permission and how each type of permission controls access to various trading partner profile components.

Table 75 Trading Partner Profile Access Permission Types

This type of permission...	allows a user to...
Read	<ul style="list-style-type: none"> Access the component to view the information Display a list of sub-components set up for this component (for example, outer envelopes set up for a trading partner)
Add	Perform all functions allowed with read access and also: <ul style="list-style-type: none"> Add a new component When adding a component, grant other users access to the component
Edit	Perform all functions allowed with read access and also: <ul style="list-style-type: none"> Change existing information and save changes Grant access to existing company information to other users at any time
Full Control	Perform all functions allowed with read, edit, and add access.

14.2 Working With Access Privileges

You must set access privileges at the following levels:

- Company
- Reports

Once you set security at the Company level, the same access rights are automatically assigned to any trading partners, outer envelopes, and inner envelopes that you set up for that company. However, you can change the access rights at any level. If you do change access rights, it is the modified access rights that are cascaded to the next level when you create a subsequent component.

For example, let's say you create a company with full access granted to the eX Administrator user group only. Then you create a trading partner and add the e*Xchange Partner Manager Access user group to the list of groups that have access. When you create an outer envelope, it will automatically allow access to both groups unless you change it.

Access privileges can be any of the following:

- Read—Users can view information but cannot change it.
- Add—Users can add new information.
- Edit—Users can edit existing information.
- Full control—Users can read, add, edit, or delete information.

User groups are set up by a member of the User Administrator user group. For more information on setting up users and user groups, refer to the chapter [“Creating and Managing Users and User Groups in e*Xchange Administrator” on page 319](#).

This section includes instructions for carrying out the following activities:

- [“Specifying Access Privileges on a New Component” on page 226](#)
- Granting access privileges to additional users or groups: see [“Granting Access Privileges to Additional Users or Groups” on page 229](#)
- Setting expiration dates for access privileges: see [“Expiring Access Privileges” on page 230](#)
- Reinstating access privileges that have expired: see [“Reinstating Access Privileges” on page 231](#)
- Deleting access privileges (can only be done when they have just been added, before clicking **Apply** or **OK**): see [“Deleting Access Privileges” on page 231](#)

14.2.1 Specifying Access Privileges on a New Component

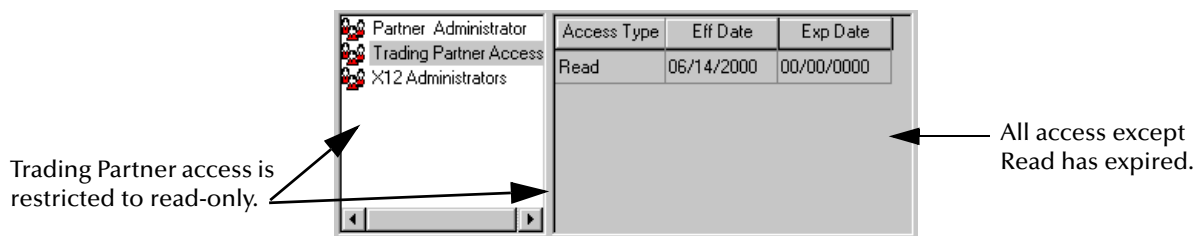
When creating a company, e*Xchange requires you to specify access privileges before saving the new company component. When creating a trading partner, outer envelope, or inner envelope, e*Xchange uses the access privileges specified at the company level unless you change the privileges.


Note: Specify at least one user or group that will have full access to the component.

To grant access privileges

- 1 With the **New [Component]** window open, click **Security**.
A list of all user groups that can access e*Xchange Partner Manager appears in the **Groups/Users** box at the top of the **Security** tab (see [Figure 127 on page 228](#)).
- 2 Do either of the following, as needed, to tailor the list of users that you want to appear in the **Groups/Users** box:
 - ♦ To display a list of all user groups and also individual users, click **Show Users**.
 - ♦ To display only the list of user groups, click **Hide Users**.
- 3 To add a user or group to the access control list at the bottom of the tab, choose the name of the user or group in the **Groups/User** box, and then click **Add**.
The name you selected appears in the **Select Groups/Users** list (see [Figure 127 on page 228](#)).
- 4 To restrict a type of access to a particular user or group, do the following:
 - ♦ Click the name of the user or group in the **Select Groups/Users** list.
 - ♦ Choose the level of access you want to restrict.
 - ♦ Click **Expire Access**. The **Select a Date** dialog box appears.
 - ♦ Choose the current date and click **OK**. The access type you selected is expired for the selected user or group (see [Figure 126](#)). If you choose a future date, the access type automatically expires on that date.

Figure 126 Access Control List



- 5 To delete the name of a user or group that you have added to the access control list during the current session, click the desired name, and then click **Delete** . The name is removed from the access control list.

Note: You can remove an account or user group name from the access control list after it has been added, only until the point at which you save the information. Once you add an access type and click **Apply** or **OK**, you cannot delete the access type from the access control list. You can, however, add back an access type that was deleted in a previous session. You can also expire access rights at any time.

- 6 Click **Apply** to save, or **OK** to save and close.

Figure 127 Security Tab

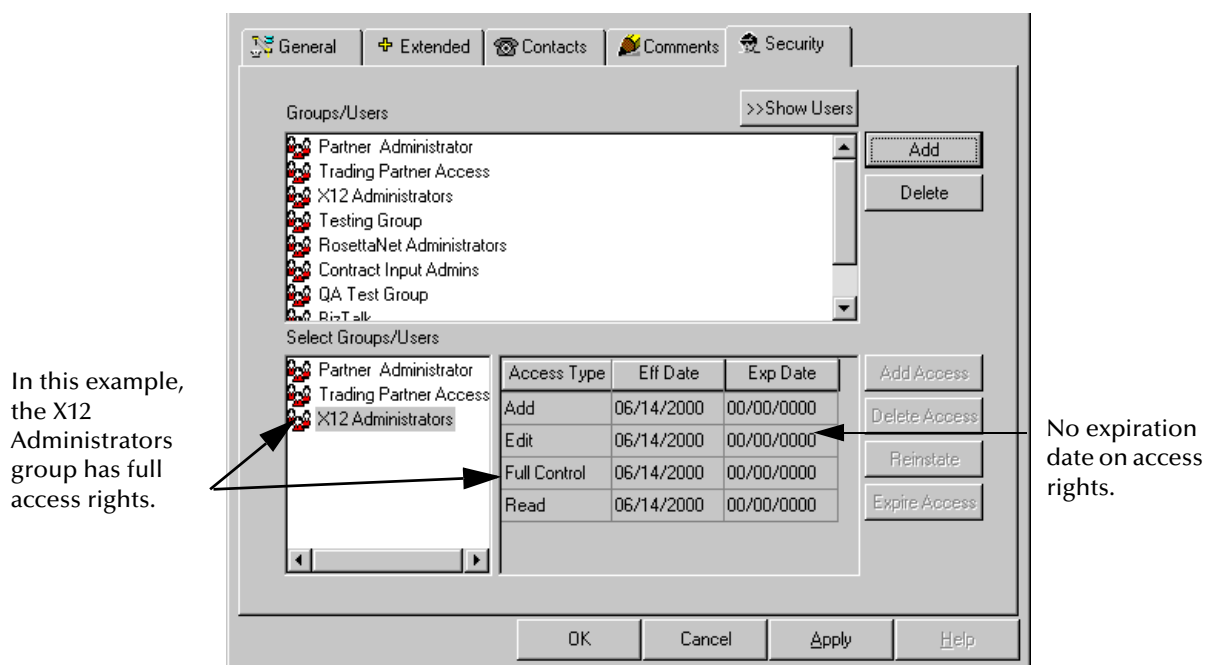


Table 76 Security Tab Fields

Name	Description
Groups/Users list	The list of groups currently set up in the system is displayed.
Show Users /Hide Users button	If you click Show Users , users are listed as well as groups in the Groups/Users list, and the button name changes to Hide Users . If you click again, users are no longer listed.
Add button	When a group or a user is highlighted in the Groups/Users list, click the Add button to add the selected group or user to the list of groups and users that will have access to this dialog box.
Delete button	If you have added a group or user to the Select Groups/Users list, you can delete the group or user within the same session by clicking the Delete button. Once you have saved the information by clicking Apply or OK , the group or user cannot be deleted.
Select Groups/Users list	The list of groups and users selected for access rights to this dialog box.
Access Type	The kind of access that the highlighted user or group has to this trading partner profile component, which can be any combination of the following: Add —Selected users and groups can add a child component (a trading partner) to the current component. Edit —Selected users and groups can modify the current component. Full Control —Selected users and groups have complete access to the current component. Read —Selected users and groups can view the current component.

Table 76 Security Tab Fields (Continued)

Name	Description
Eff Date	The first date that the level of access is granted to a user or group for the current trading partner profile component.
Exp Date	The date on which the level of access granted to a user or group for the current trading partner profile component expires. On this date, the user is denied access to the component.


14.2.2 Granting Access Privileges to Additional Users or Groups

Once you have set access privileges, the same settings are cascaded to all components created at a lower component level. For example, if you do not change the access rights, they will be the same for all trading partners, outer envelopes, and inner envelopes that you create for a company. However, you can change the access rights at any point. If you change access rights at a higher level, e*Xchange Partner Manager prompts you to check if you want to cascade the change to the lower levels.

You can expand or reduce the access privileges granted to specific users and user groups at any time.

To grant access privileges to additional users or groups

- 1 In the Partner Manager window, highlight the component to be edited.

- 2 On the toolbar, click **Properties** .

- 3 Click **Security**.

The **Security** tab appears, as shown in [Figure 127 on page 228](#).

A list of all user groups that have been set up appears in the **Groups/Users** box at the top of the tab.

- 4 Do either of the following, as needed, to tailor the list of users that will appear in the **Groups/Users** box:

- ♦ To display a list of all accounts and user groups added to e*Xchange Partner Manager, click **Show Users**.
- ♦ To redisplay just the list of user groups added to e*Xchange Partner Manager, click **Hide Users**.

- 5 Choose the name of the user or group you want to add and click **Add**.

The name you selected appears in the **Select Groups/Users** list (see [Figure 127 on page 228](#)).

- 6 Customize the access privileges for the new user or group as needed.
- 7 Click **OK** to close the **Properties** dialog box.

14.2.3 Expiring Access Privileges

If an existing user or group should no longer have access to e*Exchange Partner Manager, either temporarily or permanently, you can set an expiration date on their access rights. On the specified date, the user is no longer able to access the component.

To set expiration dates for access privileges

- 1 In the left pane of the Partner Manager window, select the trading partner.

- 2 On the toolbar, click **Properties** .

The **Properties** dialog box for the selected component appears.

- 3 Click the **Security** tab.

The **Security** tab appears (see [Figure 127 on page 228](#)).

A list of all user groups that have been selected for access rights to e*Exchange Partner Manager appears in the **Select Groups/Users** box at the bottom of the tab.

- 4 Highlight the group or user for whom you want to set an access rights expiration date.
- 5 Select the access type for which you want to set an expiration date: Full Control, Edit, Add, or Read.
- 6 Click the **Expire Access** button. The **Select a Date** dialog box appears (see [Figure 128](#)), with the current date highlighted.

Figure 128 Select a Date




- 7 Select the date on which access rights for the selected group/user will expire.
 - ♦ To move one month forward, click on the blue button to the immediate right of the **Today** button.
 - ♦ To move one year forward, click on the black button to the far right of the **Today** button.
- 8 To set an expiration date on another access type for the same user or group, repeat steps 5 through 7.

- 9 To set an expiration date on access rights for another user or group, repeat steps 4 through 7.
- 10 Click **Apply** to save changes.
- 11 Click **OK** to close.

14.2.4 Reinstating Access Privileges

You might need to reinstate a user's access privileges after they have been suspended; for example, if a user returns from a vacation or leave of absence.

To reinstate access privileges

- 1 In the left pane of the Partner Manager window, select the trading partner.
 - 2 On the toolbar, click **Properties** .
The **Properties** dialog box for the selected component appears.
 - 3 Click the **Security** tab.
The **Security** tab appears (see [Figure 127 on page 228](#)).
A list of all user groups that have been selected for access rights to e*Xchange Partner Manager appears in the **Select Groups/Users** box at the bottom of the tab.
 - 4 Highlight the group or user for whom you want reinstate access rights.
 - 5 Select the access type for which you want to reinstate rights.
 - 6 Click the **Reinstate** button.
Access is reinstated and the expiration date reset to 00/00/0000.
- Note:** The **Reinstate** button is only available if access has been expired. If the **Reinstate** button is grayed out, it means that the user already has access rights.*
- 7 Click **Apply** to save changes.
 - 8 Click **OK** to close.

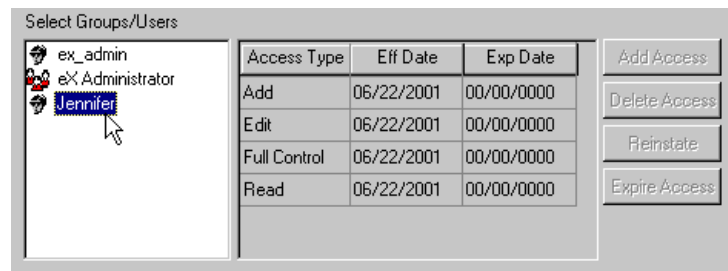
14.2.5 Deleting Access Privileges

You can only delete access privileges if the user or group was selected for access rights in the current session. Once a user or group has been granted access rights and the information saved, you cannot delete access privileges. If you do not want an existing user or group to have access, expire the access rights, as explained in [“Expiring Access Privileges” on page 230](#).

To delete access privileges

- 1 On the **Security** tab, in the **Select Groups/Users** list, highlight the group or user for whom you want to delete access rights (see [Figure 129](#)).

Figure 129 Select Groups/Users




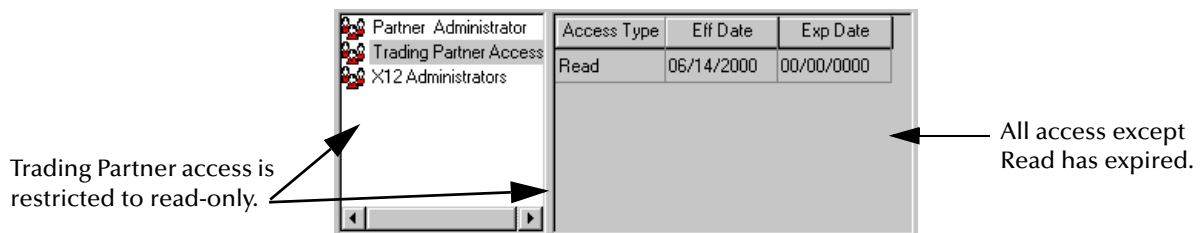
- 2 To delete certain access rights for a specific user or group, do the following:
 - ♦ Select the access type for which you want to delete rights: Full Control, Edit, Add, or Read.
 - ♦ Click the **Delete Access** button. The access type is removed from the **Access Type** list for that user or group.
- 3 To delete the user or group from the **Select Groups/Users** list entirely, do the following:
 - ♦ Click **Delete** . The name is removed from the access control list (see Figure 130).
- 4 Click **Apply** to save changes.
- 5 Click **OK** to close.

Figure 130 Access Control List



14.3 Cascading Access Rights

If you need to change access rights for an entire company, an entire trading partner, an outer envelope, or an inner envelope, you can set the access rights at the highest level and e*Xchange Partner Manager will allow you to cascade your changes to all levels below.

For example, you might have granted User Group ABC full access rights at all levels for a certain company and then decide to remove the right to add records. e*Xchange Partner Manager offers you the choice of cascading your change to the levels below or

restricting it to the current level. Instructions for accomplishing this task are provided below.

To cascade access rights

- 1 Open the **Properties** dialog box for the element for which you want to edit access rights, and then click the **Security** tab.

- 2 Edit the access rights as needed.

For example, you might choose to remove Edit access at the Trading Partner level.

- 3 Click **Apply** or **OK**.

A confirmation message appears:

Cascade access right to the lower level(s)?

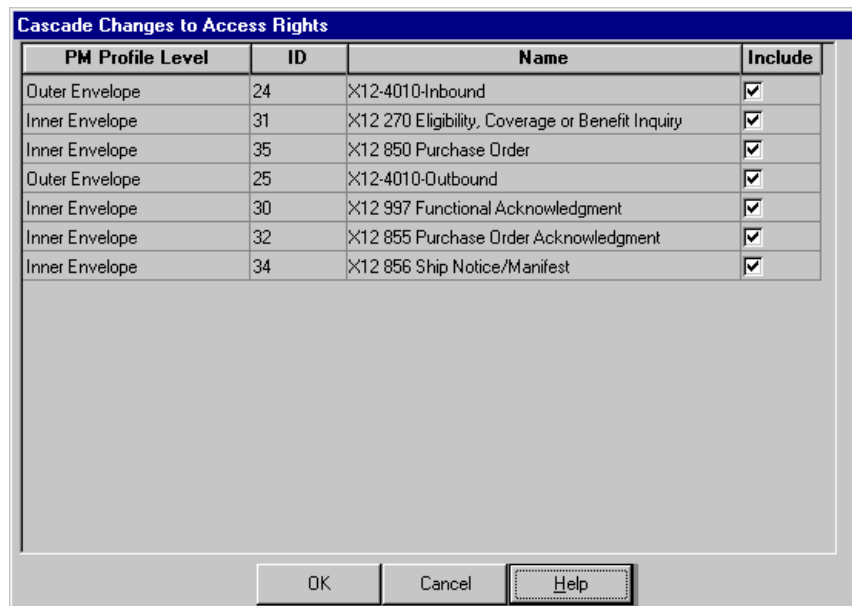
- 4 Click **Yes** to cascade access, or **No** if you want the change to affect only the current component.

Yes—the **Cascade Changes to Access Rights** dialog box appears (see Figure 131). All components below the one you selected are listed. For example, if you selected a company, all the trading partners, outer envelopes, and inner envelopes set up for that company are displayed.

No—the changes are only saved at the current level.

- 5 If there are any components at the lower level you do *not* want to update, clear the check box next to those components.
- 6 Click **OK**.

Figure 131 Cascade Changes to Access Rights



Setting Up and Using the Company and Trading Partner Components

The company and trading partner levels of a trading partner profile contain general information about a trading partner.

The outer envelope and inner envelope layers are used to set up the specific technical information required to exchange electronic messages with the trading partner.

This chapter provides information on how to set up the company and trading partner levels of the trading partner profile in e*Xchange Client for Windows. Setup of the outer and inner envelope layers is covered in the specific chapter relating to the eBusiness protocol being used.

15.1 Trading Partner Profiles

A trading partner profile is a set of characteristics and related information that you enter in e*Xchange Partner Manager to describe how to exchange electronic messages with a particular trading partner. Each profile can also include supplemental information about the trading partner, such as contact data, notes, and action items.

The trading partner information is stored in a database. Later, when electronic messages to or from the trading partner are processed, e*Xchange uses information from the trading partner profile to process the messages.

e*Xchange Partner Manager has a great deal of built-in flexibility so that it can deal with the structures of different eBusiness protocols. Information that is common to all eBusiness scenarios can be stored at each level of the trading partner profile—for example, company information, contacts, notes about the trading partner, action items, eBusiness protocol and version used, communications protocol used, and security information. Information that is specific to one eBusiness protocol is stored on the Extended Attributes tab at the appropriate level; for example, the Interchange properties in X12, the Interchange properties in UN/EDIFACT, and the Preamble for RosettaNet are stored at the outer envelope level.

There are four levels, as outlined in [“Trading Partner Profile Components” on page 235](#), for storing general information about the trading partner and specific information about the outer envelope and inner envelope layers of the messages.

For a specific electronic message exchange scenario, see [eBusiness Protocol Support](#) on page 390.

15.1.1 Trading Partner Profile Components

Each trading partner profile consists of the following components:

Company

The company component is the highest level of the trading partner profile. It includes the name of the company and related information that your business requires you to store about the partner company.

The only information required at the company level is the company name and user access assignment.

Trading partner

Information about your trading partner. This could be a subdivision of a company, it could be the same as the company, or you could set up the trading partner under a “dummy” umbrella company.

The only information required at the trading partner level is the trading partner name. All other values are optional. Security is automatically inherited from the company level, although you can change it.

Outer envelope characteristics

Use the outer envelope level to define items that are specific to a trading partner but independent of the message being sent or received. This includes items such as the communications protocol to be used, the Duns number (for RosettaNet) the Interchange Version Number (for X12), or the Interchange Sender ID (for UN/EDIFACT).

For each trading partner, you would define one inbound outer envelope and one outbound outer envelope for each message standard version.

Note: *e*Xchange Partner Manager only allows one outer envelope for each combination of eBusiness protocol, protocol version, and direction. For example, you can only have one outer envelope for X12 version 4010 Inbound, RosettaNet version 1.1 Outbound, or UN/EDIFACT version 4 Outbound.*

X12

For X12, for example, if a trading partner used version 4010, you would create an X12 version 4010 outer envelope for outbound transactions and another for inbound transactions. The values on the Interchange control header would be set up on the **Extended Attributes** tab of the **Properties** dialog box. The transmission or Interchange envelope properties are also set up in the outer envelope. The Functional Group properties are set up as extended attributes in the outer and inner envelopes.

RosettaNet

For RosettaNet, you would create a RosettaNet version 1.1 outer envelope for outbound messages and another for inbound messages. The Global Administering Authority Code, Global Usage Code, RNIF Version Identifier, From Global Business Identifier and To Global Business Identifier are set up in the outer envelope.

UN/EDIFACT

For UN/EDIFACT, for example, if a trading partner used version 4 and is using a batch message (for example, a Purchase Order Message), you would create a UN/EDIFACT version 4B outer envelope (4B = batch, 4I = interactive) for outbound transactions and another for inbound transactions. The values on the Interchange control header would be set up on the **Extended Attributes** tab of the **Properties** dialog box. The transmission or Interchange envelope properties are also set up in the outer envelope. The Group and Message properties are set up as extended attributes in the inner envelope.

Inner envelope characteristics

Use the inner envelope level to define the specific messages being sent and received, and the information directly relating to them. This includes items such as the Global Process Code and the Global Partner Role Classification Code (for RosettaNet), the Transaction Set ID and Functional ID Code (for X12), and the Message Type Identifier (for UN/EDIFACT).

Define one inner envelope for each message you will send to the trading partner and for each message you will receive from the trading partner.

X12

For X12, the transaction set properties would be set up as extended attributes in the inner envelope.

Note: *e*Xchange Partner Manager only allows one inner envelope for each combination of X12 version, active status, transaction set ID, sender ID, and receiver ID. For example, for a specific trading partner, within the 4010 outbound outer envelope, you can only have one active 997 inner envelope, though you can have multiple inactive envelopes.*

RosettaNet

For RosettaNet, values such as the Global Transaction Code, Global Process Code, and Global Business Service codes are set up as extended attributes in the inner envelope.

Note: *e*Xchange Partner Manager only allows one inner envelope for each combination of RosettaNet version, active status, PIP, sender ID, and receiver ID. For example, for a specific trading partner, within the RosettaNet version 1.1 outbound outer envelope, you can only have one active 3A4 - Manage Purchase Order inner envelopes, though you can have multiple inactive envelopes.*

UN/EDIFACT

For UN/EDIFACT, values such as the Message Type and Message Version Number are set up as extended attributes in the inner envelope.

Note: *e*Xchange Partner Manager only allows one inner envelope for each combination of UN/EDIFACT version, active status, message type, sender ID, and receiver ID. For example, for a specific trading partner, within the UN/EDIFACT 4B inbound outer envelope, you can only have one active inner envelope for the same transaction, though you can have multiple inactive envelopes.*

15.1.2 Information Structure of Trading Partner Profile Components

Each trading partner profile component (company, trading partner, outer envelope, and inner envelope) includes several tabs for you to enter the various types of required or optional information, as described below.

General characteristics

Basic information about the trading partner profile, appropriate to the component level. At the company and trading partner levels, this includes the company name and the trading partner name. At the outer envelope level, general information includes eBusiness protocol and version used, status, and (for X12 only) whether a response is required. At the inner envelope level, it includes eBusiness protocol version, data transfer mode, compression information, and the names of Collaborations used by e*Gate in processing the message.

Extended attributes

Outer envelope and inner envelope characteristics that are unique to a particular eBusiness protocol; for example, the Interchange and Functional Group properties in X12 and the Service Header and Preamble for RosettaNet. Extended attributes can also be used to store information about companies and trading partners.

Contacts

Contact information, such as names, telephone numbers, and levels of expertise. Contacts can be set up at all levels. For example, there might be one contact for the entire company, there might be one for each department, or there might be different contacts specializing in certain message types.

Notes

Supplementary information about a profile component can be stored in the form of notes.

Action Items

Reminders to perform specific tasks. You can assign these tasks to yourself or to other e*Xchange Partner Manager users. You can track progress of the action item and then mark it as completed when all required steps have been done.

Access Control List

A list of users and user groups that have been granted specific access rights to a particular trading partner profile component (view, edit, full control, or read-only).

15.2 Using the Company and Trading Partner Levels

Because you might exchange electronic eBusiness messages with more than one separate division in the same company, e*Xchange Partner Manager is structured so that you set up the company information first, and then set up the separate divisions as separate trading partners for that company.

If you don't have multiple trading partners within one company, you have two options:

- Set up a "one company-one trading partner" structure
- Set up each trading partner under a "dummy" umbrella company

You could also combine these options and set up a separate company record for each company where you exchange electronic messages with more than one department, and one "dummy" company for all your other trading partners.

The Company level requires very little setup, so whatever option you choose it will not have a significant effect on your setup time.

15.3 Adding a Company

The very first action in setting up e*Xchange Partner Manager so that you can send and receive messages is to set the defaults under the System Administration menu. Setting default values helps make setting up the partner information as smooth and fast as possible.

Once that is done, you are ready to set up trading partners.

The first step in setting up a trading partner is to add a company component and enter basic information about the company.

The only information that is required is the company name and user security assignment. All other data is optional.

The following steps walk you through the process of adding a new company to e*Xchange Partner Manager.

Note: Only a member of the eX Administrator user group can perform these steps.

To add a company

- 1 Enter general information about the company: see ["Entering General Information About the Company" on page 239](#)
- 2 Optional: Enter information about the company: see ["Entering Company Extended Attributes \(Optional\)" on page 241](#)
- 3 Optional: Add information about company contacts: see ["Storing Contact Information" on page 210](#)
- 4 Optional: Add notes and action items relating to the company: see ["Tracking Notes and Action Items" on page 216](#)
- 5 Grant user access privileges to the company information: see ["Assigning Access Privileges to Trading Partner Profiles" on page 225](#)

When you have done the above, to finish adding a trading partner profile, you must also add the following information:

- Trading partner information for each company. This is explained in ["Adding a Trading Partner" on page 242](#).

- The technical information required to exchange information with the trading partner; for example, the attributes specific to each eBusiness protocol, the communications protocol, and the security keys and certificates. This includes the following:
 - ♦ At least two outer envelopes for each trading partner; one for inbound messages, and one for outbound.
 - ♦ An inner envelope for each message that will be sent to the trading partner (under the Outbound outer envelope) and one for each message that will be received from the trading partner (under the Inbound outer envelope).


This information is addressed separately for each eBusiness protocol, in the following chapters:

- ♦ For X12: [Chapter 16](#) “Setting Up X12 Outer and Inner Envelopes”
- ♦ For RosettaNet: [Chapter 17](#) “Setting Up RosettaNet Outer and Inner Envelopes”
- ♦ For UN/EDIFACT: [Chapter 18](#) “Setting Up UN/EDIFACT Outer and Inner Envelopes”

15.3.1 Entering General Information About the Company

The first step in setting up a new company as a trading partner is to create the company component and add basic information.

To add the general company information

- 1 In the Partner Manager window, click **New Company** .

The **New Company** dialog box appears (see Figure 132).

- 2 Enter the company name, or select it from the drop-down list. For more information, see Table 77.

Note: *If the company name is not on the drop-down list, no extended attributes have been set up for the company. Extended attributes are not required at the company level; this is an extra facility that is provided so that you can track additional information about the company—for example, number of employees or type of business. If you do want to track extended attributes at the company level, ask the administrator to add the company in **Partner Manager Envelope Setup**. If not, just enter the company name.*

- 3 Continue to [“Entering Company Extended Attributes \(Optional\)” on page 241](#).

Figure 132 New Company, General Tab

The screenshot shows a Windows-style dialog box titled "New Company". It has five tabs: "General" (selected), "Extended", "Contacts", "Comments", and "Security". The "General" tab contains the following fields:

- Company Name:** A text box containing "Monrovia Computer Company".
- Company Profile:** A dropdown menu.
- Created By:** A text box.
- Created Time:** A text box.

At the bottom of the dialog are four buttons: "OK", "Cancel", "Apply", and "Help".

Table 77 General Company Fields

Name	Description
Company Name	The name of the company.
Company Profile	If you have set up company profiles in Partner Manager Envelope Setup , you can choose a profile from the list. Using profiles helps streamline data entry since you can specify default values.
Created By	The user ID of the person who saved or updated the company name is automatically displayed when the record is saved.
Created Time	The date and time the company profile was saved or updated are automatically displayed when the record is saved.

15.3.2 Entering Company Extended Attributes (Optional)

If you want to store additional information about a company—number of employees, type of business, or any other values—you can add this information to e*Xchange Partner Manager as extended attributes at the company level. You must first set up a profile at the Company level in **Partner Manager Envelope Setup** (see [“Partner Manager Envelope Setup” on page 187](#)).

When you select the profile on the **General** tab of the **New Company** dialog box, the **Extended** tab becomes available.

Note: e*Xchange Partner Manager does not include any default profiles or extended attributes at the Company level.

To set extended attribute values at the company level

Before you begin, complete [“Entering General Information About the Company” on page 239](#).

- 1 On the **New Company** dialog box, click the **Extended** tab.
The **Extended** tab of the **New Company** dialog box appears (see Figure 133).
- 2 Enter the appropriate attribute values, as required by your business.
For more information, see Table 78.

Figure 133 New Company, Extended Tab (example)

Attribute Name	Value	Min Siz
Business Industry of Parent Company		
Size of Company		

Table 78 Extended Attribute Fields

Name	Description
Attribute Name	The name of the extended attribute, as entered in Partner Manager Envelope Setup . Display only.
Value	The value of the extended attribute. If a default value is provided, you can accept it or change it. Defaults are specified by your administrator.
Min Size	The minimum size, in characters, for the attribute value.
Max Size	The maximum size, in characters, for the attribute value.
Created By	The user ID of the person who saved or updated the extended attribute is displayed.
Created Time	The date and time the extended attribute was saved or updated are automatically displayed when the record is saved.

15.3.3 Defining Contacts, Notes, Action Items, and User Security

As part of setting up each component, you have the option to set up the following additional information:

- On the **Contacts** tab—contact information
- On the **Comments** tab—notes and action items
- On the **Security** tab—user access (already inherited from the parent component level, but can be customized for the current outer envelope).

At the Company level, some designation of user access on the Security Access is required. All the rest is optional. However, each of these tabs provides you with additional capabilities.

Detailed instructions on using each of these tabs is provided in additional chapters, as follows:

Contacts tab—[Storing Contact Information](#) on page 210

Comments tab—[Tracking Notes and Action Items](#) on page 216

Security tab—[Assigning Access Privileges to Trading Partner Profiles](#) on page 225

For information on using these tabs, refer to the appropriate chapter or to the online Help system.

15.4 Adding a Trading Partner

Once you have set up the company component, the next step is to add a trading partner.

If you only send messages to one location for the company, there will be only one trading partner for the company. However, having the company and trading partner

levels separately allows you to set up multiple trading partners per company if you wish to do so.

For example, if the company has several facilities with which you exchange messages separately, you can add a separate trading partner for each facility.

The trading partner component allows you to enter general information about the trading partner. It has a five-tab structure similar to that of the company component.

The only information that is required is the trading partner name. User security assignments are inherited from the Company level unless you change them.

The following steps walk you through the process of adding a new trading partner component to e*Xchange Partner Manager.

To add a trading partner

- 1 Enter general information about the trading partner: see **[“Entering General Information About the Trading Partner” on page 244](#)**
- 2 (Optional) Enter extended attributes for the trading partner: see **[“\(Optional\) Entering Trading Partner Extended Attributes” on page 246](#)**
- 3 (Optional) Add information about trading partner contacts: see **[“Storing Contact Information” on page 210](#)**
- 4 (Optional) Add notes or action items about the trading partner: see **[“Tracking Notes and Action Items” on page 216](#)**
- 5 (Optional) Customize user access privileges to the trading partner information: see **[“Assigning Access Privileges to Trading Partner Profiles” on page 225](#)**

When you have done the above, to finish adding a trading partner profile, you must also add the technical information required to exchange information with the trading partner; for example, the attributes specific to each eBusiness protocol, the communications protocol, and the security keys and certificates. This includes the following:

- At least two outer envelopes for each trading partner; one for inbound messages, and one for outbound.
- An inner envelope for each message that will be sent to the trading partner (under the Outbound outer envelope) and one for each message that will be received from the trading partner (under the Inbound outer envelope).

This information is addressed separately for each eBusiness protocol, in the following chapters:

- For X12: **[Chapter 16 “Setting Up X12 Outer and Inner Envelopes”](#)**
- For RosettaNet: **[Chapter 17 “Setting Up RosettaNet Outer and Inner Envelopes”](#)**
- For UN/EDIFACT: **[Chapter 18 “Setting Up UN/EDIFACT Outer and Inner Envelopes”](#)**

15.4.1 Entering General Information About the Trading Partner

To identify a company or a subdivision of a company as one of your trading partners, you must add information about the trading partner to e*Xchange Partner Manager.

To add the trading partner general information

- 1 In the left pane of the Partner Manager window, choose the name of the company to which you want to add a new trading partner.

- 2 Click **New Trading Partner** .

The **New Trading Partner** dialog box appears (see Figure 134).

- 3 On the **General** tab of the **New Trading Partner** dialog box, enter the trading partner name, or select it from the drop-down list.

For more information, see Table 79.

Note: *If the trading partner name is not on the drop-down list, no extended attributes have been set up for the trading partner. Extended attributes are not required at the trading partner level; this is an extra facility that is provided so that you can track additional information—for example, number of employees. If you do want to track extended attributes at the trading partner level, ask the administrator to add the company in **Partner Manager Envelope Setup**. If not, just enter the trading partner name.*

- 4 If desired, set values for alternate ID and status.

For more information, see Table 79.

- 5 If categories have been set up by your administrator, you can specify which categories apply to this trading partner. Do the following:

- ♦ Click **Add**.
- ♦ Select the appropriate category in the **Category List** box.
- ♦ Click **Apply**.
- ♦ If additional categories apply to this trading partner, repeat as needed.

- 6 Continue to “**(Optional) Entering Trading Partner Extended Attributes**” on page 246.

Figure 134 New Trading Partner, General Tab

Table 79 General Trading Partner Fields

Name	Description
TP Name	The name of the trading partner.
TP Profile	If you have set up profiles at the trading partner level in Partner Manager Envelope Setup , you can choose a profile from the list. Using profiles helps streamline data entry since you can specify default values.
Alt ID	An alternate identification number for this trading partner. (Not currently used.)
Status	The status of the trading partner: Active or Inactive . The e*Xchange Partner Manager back end will not process messages for trading partners with a status of Inactive. Inactive trading partners are not displayed in the left pane of the e*Xchange Partner Manager window if the administrator has selected the Show Only Active TP check box in System Defaults .
Company	The name of the company associated with the trading partner is displayed.
Created By	The user ID of the person who created or updated the trading partner information is displayed.
Created Time	The date and time the trading partner information was saved or updated are automatically displayed when the record is saved.
Category	One or more categories applicable to the trading partner. If used, trading partner categories (for example, Wholesale, Manufacturing, and Retail) are defined and maintained by the administrator, and can be used for reporting purposes.

15.4.2 (Optional) Entering Trading Partner Extended Attributes

If you want to store additional information about trading partners, you can add this information to e*Xchange Partner Manager as trading partner extended attributes. You must first set up a profile at the Trading Partner level in **Partner Manager Envelope Setup** (see [“Partner Manager Envelope Setup” on page 187](#)).

When you select the profile on the **General** tab of the **New Trading Partner** dialog box, the **Extended** tab becomes available.

***Note:** e*Xchange Partner Manager does not include any default profiles or extended attributes at the Trading Partner level.*

To set extended attribute values at the trading partner level

- 1 On the **New Trading Partner** dialog box, click the **Extended** tab.

Figure 135 New Trading Partner, Extended Tab (example)

Attribute Name	Value	Min Size
Type of Business		1

- 2 Enter the appropriate attribute values, as required by your business.

For more information, see [Table 78 on page 242](#).

15.4.3 Defining Contacts, Notes, Action Items, and User Security

As part of setting up each component, you have the option to set up the following additional information:

- On the **Contacts** tab—contact information
- On the **Comments** tab—notes and action items

- On the **Security** tab—user access (already inherited from the parent component level, but can be customized for the current outer envelope).

None of this setup is required to save the new trading partner or to process messages to and from the trading partner. However, each of these tabs provides you with additional capabilities.

Detailed instructions on using each of these tabs is provided in additional chapters, as follows:

Contacts tab—[Storing Contact Information](#) on page 210

Comments tab—[Tracking Notes and Action Items](#) on page 216

Security tab—[Assigning Access Privileges to Trading Partner Profiles](#) on page 225

For information on using these tabs, refer to the appropriate chapter or to the online Help system.

15.5 Streamlining Your Setup: Copying Components

There are two copy features in e*Xchange Partner Manager. Both features allow you to copy components and edit as needed, to streamline setup. Both features apply to all component levels (Company, Trading Partner, Outer Envelope, and Inner Envelope). However, there are key differences between the two features.

The available copy features are:

- Drag-and-Drop copying of components (copies a component to a different branch of the “tree”—for example, copies an outer envelope from one trading partner to another trading partner).
- Copying via the Copy button—this clones a component at the same level; for example, creates a new outer envelope, for a different version and/or direction, based on an existing one.

15.5.1 Drag-and-Drop Copying of Components

Once you have some components set up, you can save time by copying these components across companies or trading partners. For example, if two of your trading partners use the same protocol and version, you can set up the outer envelopes once, for the first trading partner, and then copy them from the first to the second.

You can copy any component below the level of Company. The hierarchy of components (company, trading partner, outer envelope, and then inner envelope) must be maintained; for example, you cannot copy an inner envelope and place it directly beneath a trading partner. An inner envelope must be placed beneath an outer envelope, an outer envelope beneath a trading partner, and a trading partner beneath a company.

When copying, you have the option to include or exclude contact information for the component, and to include or exclude sub-components and their contact information.

To copy a component across a level

- 1 Highlight the component to be copied.
- 2 Copy the component to the new position, using drag-and-drop (click on the component with the left mouse button, hold down the button as you copy the component to the new location, and then release the mouse button).

A prompt appears, asking if you are sure you want to copy the component from the first location to the second.

- 3 Check both locations listed in the prompt; ensure that the source and destination locations are correct. Click **Yes**.

The **Copy Cascade** dialog box appears, as shown in Figure 136.

Figure 136 Copy Cascade

Trading Partner		
Name		
Arcadia Facility		

Outer Envelope		
Name	Include	Include Contacts
X12-4010-Inbound	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Inner Envelope		
Name	Include	Include Contacts
X12 270 Eligibility, Coverage or Benefit Inquiry	<input checked="" type="checkbox"/>	<input type="checkbox"/>
X12 850 Purchase Order	<input checked="" type="checkbox"/>	<input type="checkbox"/>

OK Cancel Help

- 4 All sub-components are selected by default. If there is a component that you do *not* want to copy, clear the **Include** check box for that component.
- 5 Optional: to copy the contact information as well as the rest of the component information, check the **Include Contacts** check box for each component.
- 6 Click **OK**.

The component is copied to the new location, together with any selected sub-components.

15.5.2 Copying Trading Partner Profile Components

To save time, you can use one trading partner profile component as the basis for another. You can then modify the information to match the new component.

This copy feature is available for the following component levels:

- Trading Partner
- Outer Envelope
- Inner Envelope

Copying a Trading Partner

You can copy an existing trading partner to quickly create a new trading partner. Once copied, you can modify the new profile information as needed.

To copy a trading partner

- 1 In the left pane of the Partner Manager window, highlight the trading partner you want to copy.

- 2 Click **Copy Trading Partner** .

The **Copy Trading Partner** dialog box appears (see Figure 137).

- 3 Enter the name of the new trading partner.

If the trading partner is a subdivision of a larger firm, enter the name of the subdivision (the firm name is the company). If the trading partner is a small firm with no subdivisions, enter the name of the firm.

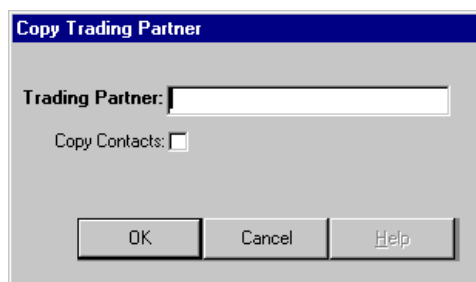
- 4 Optional: if you want to copy contact information, check the **Copy Contacts** check box.

- 5 Click **OK**.

The new trading partner appears in the left pane.

- 6 Modify the copied trading partner information as needed.

Figure 137 Copy Trading Partner



Copying Outer Envelope Characteristics

You can copy an existing outer envelope to create a new one. Once copied, you can modify the outer envelope as needed.

To copy an outer envelope

- 1 In the left pane of the Partner Manager window, select the outer envelope definition that you want to copy.

- 2 Click **Copy Outer Envelope** .

The **Copy Outer Envelope** dialog box appears (see Figure 138).

- 3 Enter the protocol version and direction for the new outer envelope.

For more information, see Table 80.

- 4 Optional: if you want to copy contact information, check the **Copy Contacts** check box.

- 5 Click **OK**.

The **Copy Outer Envelope** detail dialog box appears (see [Figure 139 on page 252](#)). This shows all the attributes already set up for the outer envelope that you are copying, and allows you to change these attributes, if desired, for the new outer envelope.

- 6 Review the attribute values, and change as needed.

To change an attribute value, enter the new value.

- 7 Conditional: If you are using RosettaNet, click the **Secure Data Transport** tab.

Note: *This tab is only applicable if you are using RosettaNet. If you are using X12 or BizTalk, skip this step.*

Any security values relating to the new outer envelope are displayed. For an example, see [Figure 140 on page 252](#).

- 8 Add security information.

Since security settings are specific to each outer envelope, you must add the settings for the new outer envelope. For more information, see [“Entering Secure Data Transport Information” on page 184](#).

- 9 Click **OK**.

The new outer envelope appears in the left pane.

Figure 138 Copy Outer Envelope

Table 80 Copy Outer Envelope Fields

Name	Description
eBusiness Protocol	The name of the eBusiness protocol is displayed. When creating a new outer envelope based on an existing one, you cannot change the standard.
Version	The version number of the electronic inner envelope standard being used. For example, version 4010 is an ANSI X12 EDI standard version for outer envelopes.
Direction	The direction for the new outer envelope (Inbound or Outbound).
Outer Envelope	The name of the new outer envelope is displayed. The outer envelope name is a combination of the eBusiness protocol, version, and direction you previously specified. You can modify this name on the Properties dialog box for the outer envelope.
Copy Contacts	If you want to copy contact information, check the Copy Contacts check box.

Figure 139 Copy Outer Envelope Detail, Extended Tab

Copy To: X12-4020-Outbound		Copy From: X12-4010-Outbound	
Attribute Name	Value	Attribute Name	Value
ISA01 AUTHOR INFO QUAL	00	ISA01 AUTHOR INFO QUAL	00
ISA02 AUTHOR INFORMATION		ISA02 AUTHOR INFORMATION	
ISA03 SEC INFO QUAL	00	ISA03 SEC INFO QUAL	00
ISA04 SECURITY INFORMATION		ISA04 SECURITY INFORMATION	
ISA05 IC SENDER ID QUAL	01	ISA05 IC SENDER ID QUAL	01
ISA06 INTERCHANGE SENDER ID	99	ISA06 INTERCHANGE SENDER ID	99
ISA07 IC RCVR ID QUAL	01	ISA07 IC RCVR ID QUAL	01
ISA08 INTERCHANGE RCVR ID	99	ISA08 INTERCHANGE RCVR ID	99
ISA11 REPEATING ELEMENT SEP	^	ISA11 IC STANDARDS ID	U
ISA12 IC VERSION NUMBER	00401	ISA12 IC VERSION NUMBER	00401
ISA13 IC CONTROL NUMBER	99	ISA13 IC CONTROL NUMBER	99
ISA15 USAGE INDICATOR	P	ISA15 USAGE INDICATOR	P
ISA16 COMP ELE SEP	>	ISA16 COMP ELE SEP	>
GS06 GROUP CONTROL NUM	99	GS06 GROUP CONTROL NUM	99
ELEMENT SEPARATOR	*	ELEMENT SEPARATOR	*

Figure 140 Copy Outer Envelope Detail, Secure Data Transport Tab

Decryption Key Name: Eff Date: Exp Date:

Decryption Key Password: Load File Password:

Sig Verification Certificate Name: Load File Eff Date: Exp Date:

Signature Key Password: Confirm Password:

Copying Inner Envelope Characteristics

You can copy an existing inner envelope to create a new one. Once copied, you can modify the new inner envelope as needed.

To copy an inner envelope

- 1 In the right pane of the e*Xchange Partner Manager window, select the inner envelope you want to copy.

- 2 Click **Copy Inner Envelope** .

The **Copy Inner Envelope** dialog box appears (see Figure 141).

- 3 Enter the version and transfer mode for the new inner envelope.

For more information, see Table 81.

- 4 Optional: if you want to copy contact information, check the **Copy Contacts** check box.

- 5 Click **OK**.

The **Copy Inner Envelope - Extended** dialog box appears (see [Figure 142 on page 254](#)). This shows all the attributes already set up for the inner envelope that you are copying, and allows you to change these attributes, if desired, for the new inner envelope.

- 6 Review the attribute values, and change as needed.

To change an attribute value, enter the new value.

- 7 Click **OK**. The new inner envelope appears in the left pane.

Figure 141 Copy Inner Envelope

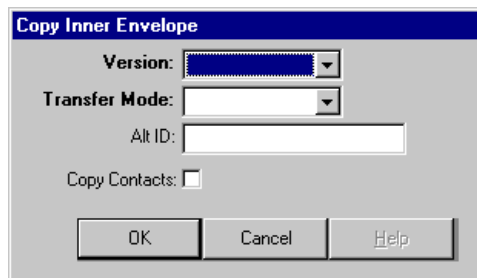


Table 81 Copy Inner Envelope Fields

Name	Description
Version	The version number for the eBusiness protocol is displayed.
Transfer Mode	This indicates whether outgoing messages of this type will be transmitted by Batch (inner envelopes are accumulated and sent to the trading partner as a group at a preset time), by Fast Batch (inner envelopes of a certain type are accumulated and sent to the trading partner as a group of messages, all of the same message type, at a preset point), or in real time (Interactive).

Table 81 Copy Inner Envelope Fields (Continued)

Name	Description
Alt ID	The alternate identification number for the new inner envelope. (Not currently used.)
Copy Contacts	If you want to copy contact information, check the Copy Contacts check box.

Figure 142 Copy Inner Envelope - Extended

The screenshot shows a software window titled "Copy Inner Envelope - Extended". It contains two side-by-side tables. The left table is titled "Copy To: X12 850 Purchase Order 4020 Interactive" and the right table is titled "Copy From: X12 850 Purchase Order 4010 Interactive". Both tables have columns for "Attribute Name" and "Value". The "Copy To" table has a "Value" column, while the "Copy From" table has a "Value" column. The tables list various attributes such as GS01 FUNCTIONAL ID CODE, GS02 APPLICATION SENDER CODE, GS03 APPLICATION RCVR CODE, GS07 RESP AGENCY CODE, GS08 VERS/REL/INDUST ID CODE, ST01 TRAN SET ID CODE, ST02 TS CONTROL NUM, TS CONTROL NUM FLAG, BATCH TIME, BATCH REPEAT TIME, BATCH REPEAT GRANULARITY, BATCH LAST SEND TIME, SEND BATCH IMMEDIATE, RETURN TRANSACTION, and RESPONSE TIME. The "Copy To" table has values for most of these attributes, while the "Copy From" table has values for some of them. The dialog also includes "OK", "Cancel", and "Help" buttons at the bottom.

15.6 Deleting Components

e*Xchange Partner Manager allows you to delete components that are no longer used; for example, if your company ceases to do business with a specific company or trading partner, or if an existing trading partner changes to a different eBusiness protocol, or to a newer protocol version.

When you delete a component, anything set up at a level below it is also deleted. For example, if you delete a trading partner, all outer envelopes and inner envelopes set up for that trading partner are also deleted.

If there are any messages existing in the database for the component being deleted, the messages are deleted too. All messages should be processed before deleting a component.

When you attempt to delete a component, e*Xchange Partner Manager displays a list of any subsidiary components that will also be deleted (see Figure 143).

Figure 143 Delete Statistics

Delete Statistics	
PM Profile Level	Row Count
Inner Envelope	5
Outer Envelope	4
Trading Partner	4
Company	1
OK Cancel Help	

To delete a component

- 1 In the left pane of the Partner Manager window, highlight the company, trading partner, outer envelope, or inner envelope to be deleted.

- 2 Click **Delete** .

The **Delete Statistics** dialog box appears (see Figure 143), showing all elements (including messages, if any) currently existing in the database for the selected component.

- 3 To delete the component, click **OK**.

Setting Up X12 Outer and Inner Envelopes

This chapter provides information on setting up, in e*Xchange Client for Windows, the specific values necessary to successfully send and receive X12 transactions to and from a trading partner. It includes information on the following:

- Setting the values for:
 - ♦ Interchange envelope (ISA and IEA segments)
 - ♦ Functional group (GS and GE segments)
 - ♦ Transaction set (ST and SE segments)
- Specifying the messaging protocol used to relay the messages
- Using the special files provided for HIPAA transactions
- Handling errors

Note: *If you are using X12, you must install the X12 templates provided by SeeBeyond. They are available during e*Gate installation via the “Add-Ons” option. For installation instructions, refer to the **ASC X12 ETD Library User’s Guide**.*

To support all versions of X12, the e*Xchange Partner Manager provides the following components:

- Default extended attributes for message envelopes
- Message tracking extended attributes
- Validation Rules Builder tool

You must create the following components as needed for your business:

- Validation Collaborations (created by means of the Validation Rules Builder tool).
- Trading partner profiles (created as part of setting up the e*Xchange Partner Manager).
- Transaction definitions (created after the trading partners have been defined, as part of setting up the e*Xchange Partner Manager).

Note: *The **Secure Data Transport** tab in the Outer Envelope of the trading partner profile is not used by the e*Xchange X12 implementation. This tab is provided as an interface for secure X12 messaging that might be required in the back-end Monk scripts for a custom implementation. If secure X12 messaging is required, the back-end Monk scripts must be significantly customized. Refer to the **e*Xchange***

Partner Manager Implementation Guide for information on the Monk APIs that would be used to retrieve the keys and certificates from the database.

For general information on X12 and the e*Gate X12 ETD library, refer to the **ASC X12 ETD Library User's Guide**.

16.1 X12 Header and Trailer Segment Values

You must enter values for the X12 header and trailer segments so that the e*Xchange Partner Manager can successfully interpret and route messages to and from a trading partner.

Most of the header and trailer segment values are set up as extended attributes on the **Extended** tab at the outer and inner envelope layers. Some other values are counted or tracked automatically by e*Xchange Partner Manager, or are provided by e*Gate.

Generally speaking, X12 envelope layers are set up in e*Xchange Partner Manager as follows:

- Outer Envelope—used to set up values specific to the trading partner but general to all messages to and from the trading partner. This includes interchange segment values, delimiters, INCLUDE IC/FG ENVELOPE, and some functional group segments.
- Inner Envelope—used to set up values specific to an individual X12 transaction. This includes some functional group segments, all the transaction set segments, and batch settings.

Table 82 shows the values required by the interchange header and footer segments for X12 version 4010, and shows how the information is recorded in e*Xchange Partner Manager. It either lists the extended attribute name, or otherwise shows how the information is tracked. Other versions might have slightly different segments or values.

Table 82 Interchange Header and Footer Values (X12 Version 4010)

Segment	Name	Layer	Extended Attribute Name
ISA Interchange Header			
ISA01	Author Info Qualifier	Outer	ISA01 AUTHOR INFO QUAL
ISA02	Author Information	Outer	ISA02 AUTHOR INFORMATION
ISA03	Security Info Qual	Outer	ISA03 SEC INFO QUAL
ISA04	Security Information	Outer	ISA04 SECURITY INFORMATION
ISA05	Interchange ID Qual	Outer	ISA05 IC SENDER ID QUAL
ISA06	Interchange Sender ID	Outer	ISA06 INTERCHANGE SENDER ID
ISA07	Interchange ID Qual	Outer	ISA07 IC RCVR ID QUAL
ISA08	Interchange Receiver ID	Outer	ISA08 INTERCHANGE RCVR ID
ISA09	Interchange Date	Outer	Taken automatically from the e*Gate time stamp.

Table 82 Interchange Header and Footer Values (X12 Version 4010) (Continued)

Segment	Name	Layer	Extended Attribute Name
ISA10	Interchange Time	Outer	Taken automatically from the e*Gate time stamp.
ISA11	Inter Ctrl Stand Ident	Outer	ISA11 IC STANDARDS ID
ISA12	Inter Ctrl Version Num	Outer	ISA12 IC VERSION NUMBER
ISA13	Inter Ctrl Number	Outer	ISA13 IC CONTROL NUMBER
ISA14	Ack Requested	Outer	Taken from Positive TA1 Acknowledgment on the General tab, Outer Envelope layer: <ul style="list-style-type: none"> If user selects Yes, value is set to 1 If user selects No, value is set to 0
ISA15	Usage Indicator	Outer	ISA15 USAGE INDICATOR
ISA16	Component Elem Sepera	Outer	ISA16 COMP ELE SEP
IEA Interchange Trailer (Footer)			
IEA01	Number of Incl Funct Group	Outer	Counted automatically by e*Xchange.
IEA02	Inter Ctrl Number	Outer	Same as ISA13

Table 83 shows the values required by the functional group header and footer segments, and shows how the information is recorded in e*Xchange Partner Manager. It either lists the extended attribute name, or otherwise shows how the information is tracked.

Table 83 Functional Group Header and Footer Values

Segment	Name	Layer	Extended Attribute Name
GS Functional Group Header			
GS01	Functional ID Code	Inner	GS01 FUNCTIONAL ID CODE
GS02	Application Sender's Code	Inner	GS02 APPLICATION SENDER CODE
GS03	Application Receiver's Code	Inner	GS03 APPLICATION RCVR CODE
GS04	Date		Taken automatically from the e*Gate time stamp.
GS05	Time		Taken automatically from the e*Gate time stamp.
GS06	Group Control Number	Outer	GS06 GROUP CONTROL NUM
GS07	Responsible Agency Code	Inner	GS07 RESP AGENCY CODE
GS08	Ver/Release ID Code	Inner	GS08 VERS/REL/INDUST ID CODE
GE Functional Group Trailer (Footer)			
GE01	Number of Transaction Sets Included		Counted automatically by e*Xchange.
GE02	Group Control Number		Same as GS06

Table 84 shows the values required by the transaction set header and footer segments, and shows how the information is recorded in e*Xchange Partner Manager. It either lists the extended attribute name, or otherwise shows how the information is tracked.

Table 84 Transaction Set Header And Footer Values

Segment	Name	Layer	Extended Attribute Name
ST Transaction Set Header			
ST01	TS ID Code	Inner	ST01 TRAN SET ID CODE
ST02	TS Control Number	Inner	ST02 TS CONTROL NUM
SE Transaction Set Trailer (Footer)			
SR01	Number of Inc Segs		Counted automatically by e*Xchange.
SE02	TS Control Number		Same as ST02

16.2 X12 Delimiters

For X12, delimiters are set up at the outer envelope level, on the **Extended** tab.

It is important to note the specific use of delimiters in the extended attributes and how it affects default use of delimiters in messages processed by the e*Xchange Partner Manager.

For inbound messages, e*Xchange Partner Manager uses the delimiters specified in the message. Even if other values are specified in the Extended Attributes, these are ignored.

For an outbound message, e*Xchange replaces the delimiters used by the internal application with those specified in the Extended Attributes before forwarding the message to the trading partner.

If the message received from the internal application does not include all the envelope layers, including ISA, GS, GE, and IEA segments, e*Xchange requires the default delimiters:

- Tilde (~) as the segment delimiter
- Asterisk (*) as the element delimiter
- Colon (:) as the composite element delimiter

If the internal application includes the full ISA IEA envelope structure, the message can use the delimiters specified in the ISA segment. e*Xchange uses these delimiters to parse the message. e*Xchange then replaces these delimiters with those specified in the Extended Attributes of the trading partner profile.

16.3 Transfer Modes in X12

X12 offers three alternatives in terms of how frequently messages are sent:

- **Interactive** (single-item batching in real time)—messages are sent as soon as they are generated or received. Typically, messages that are used in a real time mode are those that require an immediate response. The sender sends a request message to the receiver and remains connected while the receiver processes the request message and returns a response message.
- **Batch**—messages of all types are sent in groups called batches. In batch mode, the frequency of batch transmission is normally determined by a user-specified time setting.
- **Fast Batch**—inner envelopes of a certain type are accumulated and sent to the trading partner as a group of messages, all of the same transaction type, at a preset point. Fast batch has one interchange, one functional group, and a preset number of transactions. The point at which a fast batch is sent is determined by the setting in the Standard Event Structure for the inner envelope.

16.3.1 Fast Batch Settings

If you are using Fast Batch, you must set two values in the **eX_Standard_Event.ssc** file:

- Set the value “FB_UNIQUE_ID” (Fast Batch unique ID) in the Name node of the NameValuePair.
- Set the value “FB_COUNT” (Number of records to be included in the batch) in the Value node of the NameValuePair.

16.4 Communications Protocols for X12

The communications protocols supported by e*Xchange Partner Manager for X12 are:

- FTP (Batch)

The FTP (Batch) setting at the outer envelope level indicates use of FTP (file transfer protocol) for transmission of messages. Within e*Gate, this uses the ePM Batch e*Way to transfer files. Files can also be stored on the local machine.

Note: *In e*Xchange it is important to distinguish between the two uses of the word **Batch**: the FTP (Batch) protocol, and the Batch transfer mode for batching of messages.*

- HTTP

This setting indicates use of the HTTP protocol.

- SMTP

This setting indicates use of the Simple Mail Transfer Protocol.

16.5 Entering Envelope Properties

Once you have set up a trading partner, the next step is to enter the specific technical information required to successfully send messages to the trading partner and receive messages from the trading partner. This includes the following steps:

Defining outer envelopes—two for each eBusiness protocol; one for outbound messages, one for inbound messages. This includes the following:

- Defining general information for the outer envelope
- Defining extended attributes for the outer envelope
- Defining messaging information on the Transport Component tab
- If applicable, defining contacts, notes and action items, and security for the outer envelope

Defining inner envelopes—one for each type of transaction to be sent to the trading partner, under the “Outbound” outer envelope; one for each type of transaction to be received from the trading partner, under the “Inbound” outer envelope. For each inner envelope, this includes the following:

- Defining general information for the inner envelope
- Defining extended attributes for the inner envelope
- Defining the return inner envelope, if the transaction would normally expect a response transaction
- If applicable, defining contacts, notes and action items, and security for the inner envelope

16.6 Extended Envelope Attributes for X12

For ASC X12, extended attributes are values required by e*Xchange Partner Manager to build interchange, functional group, and transaction envelopes as needed for your business.

e*Xchange provides extended attribute templates for all X12 versions. However, you must provide the values yourself. You can specify default values via the **Functions** menu, **System Administration, Partner Manager Envelope Setup**. When setting up the envelopes for each trading partner, you can change the default values if needed.

Before setting up the extended attributes, or any other aspect of the trading partner setup, it is important to have the trading partner agreement for each of your trading partners, and ideally the name, address, and telephone number of the eBusiness integration contact for each trading partner. Having this information immediately available will help ensure smooth and accurate setup.

16.7 Entering Outer Envelope Properties

For each trading partner, you must set up separate outer envelopes for inbound and outbound messages.

If the trading partner uses more than one eBusiness protocol version, create additional inbound/outbound sets of outer envelopes as needed to accommodate each additional version.

The following steps include all the activities needed to add a new outer envelope to the e*Xchange Partner Manager.

To add an X12 outer envelope

- 1 Enter general outer envelope characteristics: see [“Entering General Outer Envelope Characteristics” on page 262](#).
- 2 Enter outer envelope characteristics that are specific to the message standard (extended attributes): see [“Entering Outer Envelope Extended Attributes” on page 265](#).
- 3 Enter information specific to the transport component of the outer envelope: see [“Entering Transport Component Information” on page 267](#).
- 4 Optional: define contacts, notes and action items, and security for the outer envelope see [“Defining Contacts, Notes, Action Items, and User Security” on page 270](#).

To finish adding a trading partner profile, you must also define an inner envelope for each type of message you will be sending to the trading partner, and one for each type of message you will be receiving from the trading partner. This is explained in [“Entering Inner Envelope Properties” on page 270](#).

16.7.1 Entering General Outer Envelope Characteristics

Use the **General** tab for entering general information that identifies the structure and content of the outer envelope, such as the eBusiness protocol used, message direction, and protocol version.

To enter general outer envelope characteristics


- 1 In the left pane of the Partner Manager window, select the name of the trading partner for which you want to create an outer envelope definition.
- 2 Click **New Outer Envelope** .
- The **New Outer Envelope** dialog box appears (see Figure 144).
- 3 Record the outer envelope information on the **General** tab of the **New Outer Envelope** dialog box. For more information, see Table 85.
- 4 Continue to [“Entering Outer Envelope Extended Attributes” on page 265](#).

Figure 144 New Outer Envelope, General Tab (X12)

New Outer Envelope

General | Extended | Transport Component | Secure Data Transport | Contacts | Comments | Security

eBusiness Protocol: X12

Direction:

Version:

Status: Active

Positive TAI Acknowledgement: No

Logical Name:

Description: X12--

Trading Partner: Baxter Trading

Created By:

Created Time:

OK Cancel Apply Help

Table 85 General Outer Envelope Characteristics (X12)

Name	Description
eBusiness Protocol	The name of the eBusiness protocol that is used to format the messages and related transmission information that you send to or receive from the trading partner; RosettaNet, X12, UN/EDIFACT, or BizTalk. Select X12 . After you save the new outer envelope, you cannot change the protocol.
Direction	You must define separate outer envelopes for inbound and outbound messages. This box indicates the direction for the current envelope: Inbound —For messages coming in from a trading partner. Outbound —For messages going out to a trading partner.
Version	The version number of the eBusiness protocol in use. For example, version 4010 is an ANSI X12 EDI standard for outer envelopes. All protocol versions that have been set up in Partner Manager Envelope Setup are available on the drop-down selection list. Note: After you save the new outer envelope, you cannot change the protocol version.

Table 85 General Outer Envelope Characteristics (X12) (Continued)

Name	Description
Status	<p>The status of the outer envelope. Only one inbound and one outbound outer envelope can be active for each combination of trading partner, inner envelope type, direction, and version.</p> <p>Note: The e*Xchange back end only processes messages for active profiles. Inactive outer envelopes are not displayed in the left pane of the Partner Manager window if the administrator has selected the Show Only Active TP check box in System Defaults.</p> <p>Choose one of the following values.</p> <p>Active—The outer envelope is currently active, and can be used.</p> <p>Inactive—The outer envelope is not active, and cannot be used.</p> <p>Default: Active.</p> <p>Note: If the status is Inactive and you cannot change it, this means that the setting has been made at the Trading Partner level.</p>
Positive TA1 Acknowledgment	(X12 inbound messages only) This box indicates whether a positive TA1 is to be transmitted to the trading partner.
Logical Name	<p>A unique value that you specify for the trading partner. There are several important conditions for the logical name:</p> <ul style="list-style-type: none"> For X12 and UN/EDIFACT, the Logical Name, Version, Sender ID, and Receiver ID for the outbound outer envelope must match the Logical Name, Version, Receiver ID, and Sender ID for the inbound outer envelope. <p>For example, if you are using X12 version 4020, use the same logical name value for the inbound and outbound envelopes for that version.</p> <ul style="list-style-type: none"> It must be unique for each inbound/outbound envelope set. For example, if you are using X12 versions 4020 and 4030, use one value for the 4020 inbound and outbound envelope set, and another for the 4030 inbound and outbound envelopes. If you have only one outer envelope set per company, you can use the company name. You could also use a numerical value, or any other value as long as it is unique to the inbound/outbound envelope set. For outbound messages, this is the primary value used when e*Xchange receives a message from an internal system to identify the trading partner to which the message is routed. The value in this field must be identical, including case, to the value set the eX_Standard_Event structure's Partner Name node. For more information, refer to the <i>e*Xchange Partner Manager Implementation Guide</i>.
Description	The description of the outer envelope. Default: The eBusiness protocol name, version, and direction, separated by hyphens.
Trading Partner	The name of the trading partner associated with this outer envelope is displayed.
Created By	The user ID of the person who saved or updated this outer envelope is displayed.
Created Time	The date and time this outer envelope definition was saved or updated are automatically displayed when the record is saved.

16.7.2 Entering Outer Envelope Extended Attributes

You must set up certain X12 enveloping values as extended attributes at the outer envelope level.

Predefined extended attributes are preloaded during installation, but can be changed if needed.

To enter outer envelope extended attribute values

Before you begin, complete [“Entering General Outer Envelope Characteristics” on page 262](#).

Note: For information on specific extended attributes provided with e*Xchange Partner Manager, see [“X12 Extended Attributes—Outer Envelope” on page 266](#).

- 1 On the **New Outer Envelope** dialog box, click the **Extended** tab.
The **Extended** tab appears, as shown in Figure 145.

Figure 145 New Outer Envelope, Extended Tab (X12)

Attribute Name	Value	Min Size	Max Size	Create
ISA01 AUTHOR INFO QUAL	00	2	2	
ISA02 AUTHOR INFORMATION		0	10	
ISA03 SEC INFO QUAL	00	2	2	
ISA04 SECURITY INFORMATION		0	10	
ISA05 IC SENDER ID QUAL	01	2	2	
ISA06 INTERCHANGE SENDER ID		1	15	
ISA07 IC RCVR ID QUAL	01	2	2	
ISA08 INTERCHANGE RCVR ID		1	15	
ISA11 IC STANDARDS ID	U	1	1	
ISA12 IC VERSION NUMBER	00401	5	5	
ISA13 IC CONTROL NUMBER		1	9	
ISA15 USAGE INDICATOR	P	1	1	
ISA16 COMP ELE SEP	>	1	1	
GS06 GROUP CONTROL NUM		1	9	

- 2 Enter the appropriate values for the attributes. If defaults have been set, these are displayed; however, they can be changed.
For more information on the individual attributes, refer to Table 86.
- 3 Continue to [“Entering Transport Component Information” on page 267](#).

16.7.3 X12 Extended Attributes—Outer Envelope

The sample attributes listed in Table 86 are those provided for the Interchange Control Header (ISA) for X12 Version 4010. They are set up as Extended Attributes at the outer envelope level.

Note: The extended attributes for batch processing are also applicable to X12.

Table 86 Extended Attributes Stored at the Outer Envelope Level (X12 4010)

Name	Description
ISA01 AUTHOR INFO QUAL	The Authorization Information Qualifier; a code to identify the type of information in the Authorization Information (ISA02).
ISA02 AUTHOR INFORMATION	The Authorization Information; information used for additional identification or authorization of the interchange sender or the data in the interchange. The type of information is set by the Authorization Information Qualifier (ISA01).
ISA03 SEC INFO QUAL	Security Information Qualifier: the code that identifies the type of information in the Security Information (ISA04).
ISA04 SECURITY INFORMATION	Used for identifying the security information about the interchange sender or the data in the interchange. The type of information is set by the Security Information Qualifier (ISA03).
ISA05 IC SENDER ID QUAL	Interchange ID qualifier: the code that designates the system/method of code structure used to designate the sender or receiver ID element being qualified (ISA06).
ISA06 INTERCHANGE SENDER ID	The identification code published by the sender for other parties to use as the receiver ID to route data to them. The sender always codes this value in the Sender ID element.
ISA07 IC RCVR ID QUAL	Qualifier to designate the system/method of code structure used to designate the sender or receiver ID element being qualified.
ISA08 INTERCHANGE RCVR ID	Identification code published by the receiver of the data. When sending, it is used by the sender as the sending ID. Other parties sending to them will use this as a receiving ID to route data to them.
ISA11 IC STANDARDS ID	A code to identify the agency responsible for the control standard used by the message that is enclosed by the interchange header and trailer.
ISA12 IC VERSION NUMBER	The version number for the interchange control segments.
ISA13 IC CONTROL NUMBER	Interchange control number: a control number assigned by the sender. This setting in the partner profile affects outbound messages only. e*Xchange does the following: Checks the number stored in the database, increments by one (which ensures that the value is always unique), uses that value, stores the value in the IC segment of the message, and updates the database. Note: Since the interchange control number must be unique for each interchange, it is important that this value is <i>not</i> set to a negative number. The initial value must be 0 or greater.

Table 86 Extended Attributes Stored at the Outer Envelope Level (X12 4010) (Continued)

Name	Description
ISA15 USAGE INDICATOR	A code to indicate whether the data enclosed in the interchange envelope is test, production, or information.
ISA16 COMP ELE SEP	Component element separator: the delimiter used to separate component data elements within a composite data structure (must be different from the data element separator and the segment terminator).
GS06 GROUP CONTROL NUM	Functional group control number: a control number assigned by the message sender. The group control number must be unique within the interchange. This setting in the partner profile affects outbound messages only. Note: Make sure the initial value is 0 or greater. e*Xchange does the following: Checks the number stored in the database, increments by one, uses that value, and updates the database. Note: The Functional Group control number GS06 in the header must be identical to the same data element in the associated Functional Group trailer, GE02.
ELEMENT SEPARATOR	The separator symbol used to separate data elements.
SEGMENT TERMINATOR	The symbol used to indicate the end of the segment.
INCLUDE IC/FG ENVELOPE	If your internal system expects the ISA...IEA and GS...GE segments on incoming transactions, you must set this value to Y . If your internal system does not use these segments, set to N . If set to N , e*Xchange relays only the ST/SE header and footer with the message. Note: For inbound messages, if your internal system expects the ISA/IEA and GS/GE segments on incoming messages, this flag must be set correctly for the messages to be read successfully.

16.7.4 Entering Transport Component Information

You must specify the communications protocol by which messages will be sent, and provide information required by the protocol.

To add transport component information

- 1 On the **New Outer Envelope** dialog box, click the **Transport Component** tab.
- 2 The **Transport Component** tab appears: see Figure 146.
- 3 Select the communications protocol.
The rest of the values change according to your selection.
- 4 Fill in the appropriate values. For more information, see Table 87.
- 5 Click **Apply**.
If you entered a password, the **Confirm Password** dialog box appears.
- 6 Confirm the password.

Type the password exactly as you typed it in the **Password** box, and then press **Enter**. The password is case-sensitive; make sure you use the correct capitalization.

Note: Password confirmation is only to avoid errors, not for security purposes. Anyone with access to this dialog box can change the password at any time. You do not need to know the old password to change to a new one.

- 7 If applicable, continue to **“Defining Contacts, Notes, Action Items, and User Security” on page 270**.

Note: The Secure Data Transport tab is not currently applicable to X12.

Figure 146 New Outer Envelope, Transport Component Tab

Table 87 Outer Envelope Transport Component Fields

Name	Description
Comm Protocol	<p>The communications protocol used for this outer envelope. For X12, only FTP (Batch), HTTP, and SMTP are valid choices for e*Xchange Client for Windows.</p> <p>If you are using the Web interface, HTTPS is also available.</p> <p>FTP (Batch)—Messages are transmitted using the FTP protocol.</p> <p>Note: If you want the files to be stored on the local machine, supply the File Name but leave the User Name, Password, Host, and Port boxes empty.</p> <p>HTTP—Messages are transmitted with HTTP.</p> <p>HTTPS—Messages are transmitted using HTTP with SSL (available only via the Web interface).</p> <p>SMTP—Messages are transmitted using the Simple Mail Transfer Protocol.</p>

Table 87 Outer Envelope Transport Component Fields (Continued)

Name	Description
File Name (FTP)	<p>For inbound—type the complete file name, including path and extension, of the file from which inbound outer envelopes based on this profile are read, or to which outbound outer envelopes are written. You can use wild cards in the filename or at the beginning of the extension but not at the end; for example, use *.dat or *.*at but not *.da*.</p> <p>For outbound—type the complete file name, including path and extension, using variables as needed. %d adds a two-digit day (for example, 05 for the fifth day of the month) to the file name, and %# adds a sequential number (for example, 01, 02, and so forth); for example, TP01%d_%#.dat.</p> <p>Windows: If the FTP server is set up on a Windows machine, the path must be relative to the FTP server default directory. For example, if the FTP server default directory is c:\eGate and your full path for inbound messages is c:\eGate\X12\input*.in, type only \X12\input.*in.</p> <p>UNIX: If the FTP server is set up on a UNIX machine, use forward slashes. For example, your full path for outbound messages might be /home/eGate/EFT/output/1400_EDF48_%d_%#.dat.</p>
URL (HTTP)	<p>If comm protocol is HTTP, enter the full URL, including prefix. For example:</p> <ul style="list-style-type: none"> http://www.WebAddress.com
User Name (FTP, HTTP)	<p>The user name to be used to access the host on which messages are stored. If the comm protocol is FTP (Batch), this is required for successful transfer of files to and from the FTP server.</p> <p>Note: If you want to store the files on the local machine, leave empty.</p>
Password (FTP, HTTP)	<p>The password to be used to access the host used for storage and retrieval of messages.</p> <p>If comm protocol is FTP (Batch)—this is required for successful transfer of files to or from the host. If files are stored locally, leave empty.</p> <p>When you have entered all the information, click Apply or OK to save the data. A Confirm Password dialog box appears. The password you enter in this dialog box must match the one entered in the Password box before the data is accepted. This helps prevent errors in entering a password.</p>
Host (FTP)	<p>The name of the host on which messages are stored. For inbound messages, this is the source of the messages; for outbound messages, it is the destination.</p> <p>If comm protocol is FTP (Batch)— this is required for successful transfer of files to or from the host. If files are stored locally, leave empty.</p>
Port (FTP)	<p>If desired, you can specify the port to be used to access the host. Leave blank to use the default port.</p>
Sender e-Mail Address (SMTP)	<p>The e-mail address of the message sender.</p>
Receiver e-Mail (SMTP)	<p>The e-mail address of the message recipient.</p>
(Outbound only) MailHost/IP Address (SMTP)	<p>The host name of the mail server.</p>

Table 87 Outer Envelope Transport Component Fields (Continued)

Name	Description
(Outbound only) MailHost Port (SMTP)	The port for the mail server.

Note: The Secure Data Transport tab is not currently applicable to X12.

16.7.5 Defining Contacts, Notes, Action Items, and User Security

As part of setting up each component, you have the option to set up the following additional information:

- On the **Contacts** tab—contact information
- On the **Comments** tab—notes and action items
- On the **Security** tab—user access (already inherited from the parent component level, but can be customized for the current outer envelope).

None of this setup is required to save the new outer envelope or to process messages to and from the trading partner. However, each of these tabs provides you with additional capabilities.

Detailed instructions on using each of these tabs is provided in additional chapters, as follows:

Contacts tab—[Storing Contact Information](#) on page 210

Comments tab—[Tracking Notes and Action Items](#) on page 216

Security tab—[Assigning Access Privileges to Trading Partner Profiles](#) on page 225

For information on using these tabs, refer to the appropriate chapter or to the online Help system.

16.8 Entering Inner Envelope Properties

Once you have set up outer envelopes, you can define the specific messages that you will be sending and receiving. These are set up at the inner envelope level.

You must set up a separate inner envelope for each type of message that will be sent to the trading partner and each type of message that will be received from the trading partner.

Note: If you want to set up more than one inner envelope for the same transaction, you must include the functional group segments (GS and GE) in the message from the internal application. Since the Sender ID, Receiver ID, and Functional Group Version are part of the functional group, including the functional group segments in the message will allow e*Xchange Partner Manager to correctly identify and route the inner envelope.

The following steps include all the activities needed to add a new inner envelope. You can perform these steps only if you have the appropriate access rights.

- 1 Enter general inner envelope characteristics: see [“Entering General Inner Envelope Characteristics” on page 271](#)
- 2 Enter extended attributes that are unique to the eBusiness protocol: see [“Entering Inner Envelope Attribute Values” on page 275](#)
- 3 Optional: define contacts, notes and action items, and security for the inner envelope see [“Defining Contacts, Notes, Action Items, and User Security” on page 278](#)
- 4 When you have set up all inner envelopes, go back and enter information about the return inner envelopes that will be expected in response to each inner envelope: see [“Entering Return Inner Envelope Information” on page 279](#). It is important to set up all envelopes before completing this step; if you do not, the return envelopes will not be available for selection.

When you have finished setting up the inner envelopes, trading partner setup is complete.

16.8.1 Entering General Inner Envelope Characteristics

To identify the structure and content of the inner envelope so that it can be correctly processed by e*Xchange Partner Manager, you must enter general information such as the protocol version and transfer mode.

Note: First, set up all the eBusiness messages that you will be using for this trading partner, both inbound and outbound, without setting up return messages. When you have done this, go back to each inner envelope and select the appropriate messages that would be expected responses.

To enter general inner envelope characteristics

- 1 In the left pane of the Partner Manager window, select the appropriate outer envelope (inbound or outbound).

- 2 Click **New Inner Envelope** .

The **New Inner Envelope** dialog box appears (see Figure 148).

- 3 In the **Version** box, choose the eBusiness protocol that the trading partner is using. One of two things occurs, according to whether you have inner envelope definitions set up for this version in the **Inner Envelope Definition Setup** dialog box:

- ♦ If you have transactions set up, the **Transaction Sets** dialog box appears (see Figure 147). Choose an inner envelope definition, and then click **OK** to return to the **General** tab of the **New Inner Envelope** dialog box. The **Description** and **Validation Collaboration** boxes are filled in based on your selection.

Figure 147 Transaction Sets (X12)

The screenshot shows a window titled "Transaction Sets" with a "Sort By:" dropdown menu. Below the menu is a table with three columns: "Description", "Validation Collaboration", and "Created By". The table contains 20 rows of transaction set information. At the bottom of the window are three buttons: "OK", "Cancel", and "Help".

Description	Validation Collaboration	Created By
X12_270 Eligibility, Coverage or Benefit Inquiry	X12_270EligibilityCoverageorBene	ex_admin
X12 997 Functional Acknowledgment	X12_997_FunctionalAck	ex_admin
X12 850 Purchase Order	X12_850_PurchaseOrder	ex_admin
X12 855 Purchase Order Acknowledgment	X12_855_PurchaseOrderAcknowl	ex_admin
X12 856 Ship Notice/Manifest	X12_855_ShipNoticeManifest	ex_admin
X12_276 HC Claim Status Request	X12_276HealthCareClaimStatusRe	ex_admin
X12_277 HC Claim Status Notification	X12_277HealthCareClaimStatusN	ex_admin
X12_856 Ship Notice/Manifest	X12_856ShipNotice/Manifest	ex_admin
X12_857 Shipment and Billing Notice	X12_857ShipmentandBillingNotice	ex_admin
X12_834 Benefit Enrollment and Maintenance	X12_834BenefitEnrollmentandMai	ex_admin
X12_835 Health Care Claim Payment Advice	X12_835HealthCareClaimPayment	ex_admin
X12_837 Health Care Claim - Professional	X12_837HealthCareClaim_00401C	ex_admin
X12_278 Health Care Services Review Information	X12_278HealthCareServicesRevi	ex_admin
X12_867 Product Transfer and Resale Report	X12_867ProductTransferandResa	ex_admin
X12_810 Invoice	X12_810Invoice	ex_admin
X12_837 Health Care Claim - Dental	X12_837HealthCareClaim_00401C	ex_admin
X12_837 Health Care Claim - Institutional	X12_837HealthCareClaim_00401C	ex_admin
X12_278 Health Care Services Review Information	X12_278HealthCareServicesRevi	ex_admin
X12_271 Eligibility, Coverage or Benefit Information	X12_271EligibilityCoverageorBene	ex_admin

- ♦ If you do not have definitions set up, enter the values for **Validation Collaboration and Description**. For more information, refer to Table 88.
- 4 Enter the **Transfer Mode**: Batch, Fast Batch, or Interactive. For more information, refer to Table 88.
- 5 Continue to **“Entering Inner Envelope Attribute Values” on page 275**.

Figure 148 New Inner Envelope, General Tab

New Inner Envelope

General Extended Return Inner Envelope Contacts Comments Security

Version: 4030

Transfer Mode: [dropdown]

Alt ID: [text]

Status: Active

Message Compress: ☐

Validation Collaboration: [text]

Description: [text]

Outer Envelope: X12-4030-Inbound

Created By: [text]

Created Time: [text]

OK Cancel Apply Help

Table 88 General Inner Envelope Characteristics

Name	Description
Version	The version number of the eBusiness protocol in use. For example, version 4010 is an ANSI X12 EDI standard for inner envelopes. After you save the inner envelope, you cannot modify this value. Once you select from the Transaction Sets dialog box, the Version , Status , Validation Collaboration , Description , and Outer Envelope values are filled in for you. An icon next to the Version box allows you to reselect from the Transaction Sets dialog box if needed.

Table 88 General Inner Envelope Characteristics (Continued)

Name	Description
Transfer Mode	<p>The way in which the eBusiness messages are transmitted to, or received from, the trading partner. The following choices are valid for X12:</p> <p>Batch— Inner envelopes of all types are accumulated and sent to the trading partner as a group at a preset time or at preset intervals. A batch includes multiple transactions, accumulated up to the preset send time, and can have multiple functional groups. Messages of different types can be batched in the same functional group if they have the same functional group ID code, sender ID code, receiver ID code, and functional group version number.</p> <p>Fast Batch— Inner envelopes of a certain type are accumulated and sent to the trading partner as a group of messages, all of the same transaction type, at a preset point. Messages can be batched in the same functional group if they have the same functional group ID code, sender ID code, receiver ID code, and functional group version number. The point at which a fast batch is sent is determined by the setting in the Standard Event Structure for the inner envelope. For more information, refer to “Fast Batch Settings” on page 260. Transactions grouped within the fast batch must have the same functional ID code, sender ID code, receiver ID code, and functional group version number, and also the same interchange ID.</p> <p>Interactive— Inner envelopes are created and sent to the trading partner individually in real time. This mode facilitates “question and answer” types of inner envelopes.</p>
ALT ID	An alternate identification number for this kind of inner envelope. (Not currently used.)
Status	<p>The status of the inner envelope: Active or Inactive. The e*Xchange Partner Manager back end will not process messages that are inactive. Inactive inner envelopes are not displayed in the left pane of the Partner Manager window if the administrator has selected the Show Only Active TP check box in System Defaults.</p> <p>Note: If the status is Inactive and you cannot change it, this means that the setting has been made at the Trading Partner or Outer Envelope level.</p>
Message Compress	<p>Indicates whether the messages should be compressed before they are stored in the database. Default: cleared (inner envelopes are not compressed).</p> <p>Note: If you select this option, the messages are not viewable in the Message Tracking window.</p>

Table 88 General Inner Envelope Characteristics (Continued)

Name	Description
Validation Collaboration	The name of the Collaboration that verifies and translates inner envelopes of this type. When you select from the Transaction Sets dialog box (Transfer Mode box), the validation Collaboration is filled in, but you can modify or delete it. For inbound messages, validation is required. For outbound messages, you might choose not to run validation on the message if you are sure outgoing messages are correct. Note: e*Xchange includes a custom validation Collaboration for inbound 997 transactions. Enter ex_997_text .
Description	The identification number and name of the inner envelope you are defining. If you defined inner envelopes as part of setup, the description is filled in for you when you select from the Transaction Sets dialog box (Transfer Mode box). If you did not create any inner envelope definitions, type a description.
Outer Envelope	The name of the outer envelope associated with this inner envelope is displayed.
Created By	The user ID of the person who created or updated this outer envelope is displayed.
Created Time	The date and time this outer envelope definition was saved or updated are automatically displayed when the record is saved.

16.8.2 Entering Inner Envelope Attribute Values

To record inner envelope characteristics specific to the message standard being used, you must add this information to e*Xchange Partner Manager as a set of extended attributes.

To enter inner envelope extended attribute values

Note: For information on specific extended attributes, see [“Extended Envelope Attributes for X12” on page 261](#).

- 1 On the **New Inner Envelope** dialog box, click the **Extended** tab.

Figure 149 New Inner Envelope, Extended Tab (X12)

Attribute Name	Value	Min Size	Max Size
GS01 FUNCTIONAL ID CODE		2	2
GS02 APPLICATION SENDER CODE		2	15
GS03 APPLICATION RCVR CODE		2	15
GS07 RESP AGENCY CODE	X	1	2
GS08 VERS/REL/INDUST ID CODE	004020X099	1	12
ST01 TRAN SET ID CODE		3	3
ST02 TS CONTROL NUM		1	9
BATCH TIME[hh:mm:ss]		1	50
BATCH REPEAT TIME		1	20
BATCH REPEAT GRANULARITY[H-Hour; M-Minute; D-Day]		1	10
BATCH LAST SEND TIME[MM/DD/YYYY hh:mm:ss]	01/01/1970 12:01:00	1	20
RETURN TRANSACTION		1	50
RESPONSE TIME		1	50
RESPONSE TIME GRANULARITY		1	50

- 2 Enter the appropriate attribute values, as required by your business.
For information on specific attributes, refer to Table 89.
- 3 Continue to [“Entering Return Inner Envelope Information” on page 279.](#)

16.8.3 X12 Extended Attributes—Inner Envelope

The sample attributes listed in Table 89 are for X12 Version 4010. They are set up as Extended Attributes at the inner envelope level.

Table 89 Extended Attributes Stored at the Inner Envelope Level (X12 4010)

Name	Description
GS01 FUNCTIONAL ID CODE	Functional identifier code: the two-letter code that identifies a specific transaction within the transaction set. For example, for a 997, Functional Acknowledgment, the functional ID code is FA.
GS02 APPLICATION SENDER CODE	The code that identifies the sender of the transmission. The codes are agreed-upon by trading partners.
GS03 APPLICATION RCVR CODE	The code that identifies the receiver of the transmission. The codes are agreed-upon by trading partners.
GS07 RESP AGENCY CODE	Responsible Agency Code: the code used in conjunction with GS08.

Table 89 Extended Attributes Stored at the Inner Envelope Level (X12 4010) (Continued)

Name	Description
GS08 VERS/REL/INDUST ID CODE	This code indicates the version, release, subrelease, and industry identifier of the EDI standard being used, including the GS and GE segments. This segment will have the following values, according to the values in GS07: GS07 code X—positions 1–3 are the version number, positions 4–6 are the release and subrelease level of the version, and positions 7–12 are the industry or trade association identifiers (optionally assigned by the user). GS07 code T—other formats are allowed.
ST01 TRAN SET ID CODE	The unique ID code assigned to the transaction set; for example, 850 for a Purchase Order or 837 for a Health Care Claim.
ST02 TS CONTROL NUM	Transaction set control number: a control number assigned by the sender. This setting in the partner profile affects outbound messages only. Note: The control number in ST02 must be identical with that in SE02, and must be unique within a Functional Group (GS-GE). The number also aids in error resolution research. For example, start with the number 0001 and increment from there. The ST02 works a little differently depending on the Transfer Mode, as follows: For Batch or Fast Batch messages, e*Xchange does the following: Regardless of the value set in this field, e*Xchange always sets the Transaction Set control number to 1 within each Functional Group. This is due to conflicts in control numbers if more than one transaction set type is included in a single Functional Group. For Interactive messages, e*Xchange does the following: Transaction Set Control Number 0 or greater—e*Xchange increments from the initial value. Transaction Set Control Number less than 0—Control number always starts at 1, within each Functional Group.

0.0.1 Additional Extended Attributes for Batch Processing

The extended attributes shown in Table 90 are available if you choose **Batch** in the **Transfer Mode** box on the **General** tab of the inner envelope.

There are two choices in terms of how you determine when batches are sent out:

- **Batch Time**—sets a specific time or times when batches are sent.
- **Repeat Time/Repeat Granularity**—sets a specific time interval; for example, 8 hours.

If you set values for Batch Repeat Time/Batch Repeat Granularity and also Batch Time, e*Xchange uses the value in the **Batch Time** field to determine when batches are sent out.

Table 90 Additional Extended Attributes for Batch Processing (Inner Envelope)

Name	Description
BATCH TIME[hh:mm:ss]	<p>To send batches at a preset daily time, enter the time in the format hh:mm:ss (military time); for example, 09:00:00 for 9am or 15:30:00 for 3pm. If the batch is being set at a preset daily time, you do not need to set any other attributes.</p> <p>You can also set multiple batch times, using the pipe symbol as the delimiter (up to 50 characters). For example, 09:00:00 17:30:00 24:00:00 sends out batches at 9am, 5:30pm, and midnight. The values must be in ordered sequence, from the earliest times to the latest.</p> <p>Note: If you set values for Batch Repeat Time/Batch Repeat Granularity and also Batch Time, the Batch Time setting takes precedence.</p>
BATCH REPEAT TIME/ BATCH REPEAT GRANULARITY	<p>To send batches at regular intervals, use these two attributes. BATCH REPEAT TIME sets the numerical value, and BATCH REPEAT GRANULARITY sets the time period: H for hours, MI for minutes, and D for days. For example, BATCH REPEAT TIME of 4 and BATCH REPEAT GRANULARITY of H means that batches will be sent out every four hours; values of 30 and MI mean that batches will be sent out every 30 minutes.</p> <p>To send batches at a preset daily time, enter the time in the format hh:mm:ss (military time); for example, 09:00:00 for 9am or 15:30:00 for 3:30pm. If the batch is being set at a preset daily time, you do not need to set any other attributes.</p> <p>Note: If you use these fields to control batching, you can have a maximum of 10 Batch e*Ways running. This is because the display-only Repeat Batch Last Check Time field has a maximum of 255 characters.</p>

16.8.4 Defining Contacts, Notes, Action Items, and User Security

As part of setting up each component, you have the option to set up the following additional information:

- On the **Contacts** tab—contact information
- On the **Comments** tab—notes and action items
- On the **Security** tab—user access (already inherited from the parent component level, but can be customized for the current outer envelope).

None of this setup is required to save the new outer envelope or to process messages to and from the trading partner. However, each of these tabs provides you with additional capabilities.

Detailed instructions on using each of these tabs is provided in additional chapters, as follows:

Contacts tab—[“Storing Contact Information” on page 210](#)

Comments tab—[“Tracking Notes and Action Items” on page 216](#)

Security tab—[“Assigning Access Privileges to Trading Partner Profiles” on page 225](#)

For information on using these tabs, refer to the appropriate chapter or to the online Help system.

When you have set up everything except Return Inner Envelope information for all your inner envelopes, continue to [“Entering Return Inner Envelope Information” on page 279](#).

16.9 Return Inner Envelopes

Once you have set up inner envelopes for all your inbound and outbound transactions, you are ready to specify which transactions will be expected in response.

16.9.1 About Return Inner Envelopes

The e*Xchange Partner Manager allows you to specify one or more return inner envelopes that will be valid for a specific incoming or outgoing inner envelope. However, some setup is required before the correct selections are available on the **Return Inner Envelope** tab. You must create all inner envelopes for the trading partner, both inbound and outbound, so that the correct selections will be available to you.

For example, suppose you are using X12 and have a trading partner, ABC Company. You will receive only transaction 850, Purchase Order, from this trading partner. In response you might send 855, Purchase Order Acknowledgment, 856, Ship Notice/Manifest, or 997, Functional Acknowledgment. This scenario is illustrated in [“New Inner Envelope, Return Inner Envelope Tab” on page 280](#).

To set this up you must do the following:

- In **Inner Envelope Definition Setup**, for the specific protocol version, define each of these three transactions (See [“Creating Inner Envelope Definitions” on page 190](#)).
- Define outbound inner envelopes for transactions 997, 855, and 856 (See [“To enter return inner envelope information” on page 279](#)).
- Define the inbound inner envelope for transaction 850. Because you defined the outbound envelopes first, 997, 855, and 856 are all available for selection on the **Return Inner Envelope** tab.

16.9.2 Entering Return Inner Envelope Information

You must specify the inner envelope or envelopes that will be expected in response to the current inner envelope. You can select more than one return inner envelope.

Note: *If the appropriate return inner envelopes are not available for selection, some additional setup is required. Refer to [“About Return Inner Envelopes” on page 279](#).*

To enter return inner envelope information

Before you begin, complete [“Entering Inner Envelope Attribute Values” on page 275](#).

- 1 On the **Inner Envelope** dialog box, click the **Return Inner Envelope** tab.

Figure 150 New Inner Envelope, Return Inner Envelope Tab

Transfer Mode	Version	Description	Include	Response Time	Period	# of Retries
Interactive	4010	X12 997 Functional Acknowledgment	<input type="checkbox"/>			
Interactive	4010	X12 855 Purchase Order Acknowledgment	<input type="checkbox"/>			
Interactive	4010	X12 856 Ship Notice/Manifest	<input type="checkbox"/>			

All eBusiness messages that have already been defined for this trading partner, for the opposite direction, are listed. It is up to you to know which eBusiness messages are the correct responses for the current eBusiness implementation. This should be defined in the trading partner agreement.

- 2 For each listed message type that might be returned by the trading partner (for outbound messages), or for each message type that you might return to the trading partner (for inbound messages), do the following:

- ♦ Check the **Include** check box.

Note: Even though Negative Ack eBusiness messages must be defined in each direction for each trading partner, do not select these as an expected response. Only select response eBusiness messages that occur in the Go path of an eBusiness message exchange. For example, for X12, if a 997 is only expected for an error condition, do not select it in this tab.

- ♦ Set the response time and period that will be acceptable for receiving the return envelope; for example, a response time of 24 and period of hours means that a response should be received within 24 hours. If the response is not received within the preset time period, the message is resent for the preset number of times (as set in **# of Retries**).

Note: For outbound messages, the Response Time is the time used by the e*Gate Ack Monitor in monitoring message response and resending messages if an acknowledgment is not received.

- ♦ Set the number of times the inner envelope should be resent if a response is not received before the envelope is recorded as a failed message. For example, if the message should be sent once and then retried once if the return inner envelope is not received, the retry setting would be 1.
- 3 Continue to **“Defining Contacts, Notes, Action Items, and User Security”** on page 270.

16.10 HIPAA Transactions

e*Xchange includes Collaboration Rules (.tsc) and Event Type Definition (.ssc) files for many of the standard HIPAA (Health Insurance Portability and Accountability Act) transactions. There are HIPAA transaction files for the following HIPAA Implementation Guide releases:

- May 1999
- May 2000

The files that match the HIPAA standard have “hipaa” appended to the file name. Examples are shown below.

- Collaboration Rules file for an X12 270, Eligibility Coverage Inquiry, May 1999 release: **X12_270EligibilityCoverageorBenefitInquiry_004010X092_hipaa.tsc**.
- Collaboration Rules file for an X12 270, Eligibility Coverage Inquiry, May 2000 release: **X12_270EligibilityCoverageorBenefitInquiry_004010X092_00_hipaa.tsc**.

In some cases, there are different versions of the HIPAA files. For example, for the May 1999 release, there are three versions for 837, as follows:

- X12_837HealthCareClaim004010X096_hipaa_q1 (professional)
- X12_837HealthCareClaim004010X096_hipaa_q2 (dental)
- X12_837HealthCareClaim004010X096_hipaa_q3 (institutional)

HIPAA files are automatically installed in the following location:

- \eGate\server\registry\repository\default\monk_scripts\common

16.10.1 Standard e*Xchange Format HIPAA ETD Files

The standard HIPAA Collaboration Rules (.tsc) and Event Type Definition (.ssc) files are in a format suitable for use with e*Xchange; they include only the transaction portion of the message, without the GS/GE and ISA/IEA enveloping.

May 1999 Files

The May 1999 HIPAA transactions included with e*Xchange version 4.5 are listed in Table 91.

Table 91 HIPAA Transactions (May 1999) Provided with e*Xchange

File Name	Transaction
X12_270EligibilityCoverageorBenefitInquiry_004010X092_hipaa	270 (Eligibility Coverage or Benefit Inquiry)
X12_271EligibilityCoverageorBenefitInformation_004010X092_hipaa	271 (Eligibility Coverage or Benefit Information)
X12_276HealthCareClaimStatusRequest_004010X093_hipaa	276 (Health Care Claim Status Request)
X12_277HealthCareClaimStatusNotification_004010X093_hipaa	277 (Health Care Claim Status Notification)
X12_278HealthCareServicesReviewInformation_004010X094_hipaa_a1	278 (Health Care Services Review Information: Request for Review)
X12_278HealthCareServicesReviewInformation_004010X094_hipaa_a3	278 (Health Care Services Review Information: Response to Request)
X12_820PaymentOrderRemittanceAdvice_004010X061_hipaa	820 (Payment Order Remittance Advice)
X12_834BenefitEnrollmentandMaintenance_004010X095_hipaa	834 (Benefit Enrollment and Maintenance)
X12_835HealthCareClaimPaymentAdvice_004010X091_hipaa	835 (Health Care Claim Payment Advice)
X12_837HealthCareClaim_004010X098_hipaa_q1	837 (Health Care Claim: Professional)
X12_837HealthCareClaim_004010X097_hipaa_q2	837 (Health Care Claim: Dental)
X12_837HealthCareClaim_004010X096_hipaa_q3	837 (Health Care Claim: Institutional)

May 2000 Files

The May 2000 HIPAA transactions included with e*Xchange version 4.5 are listed in Table 92.

Table 92 HIPAA Transactions (May 2000) Provided with e*Xchange

File Name	Transaction
X12_270EligibCoverageBenefitInquiry_004010X092_00_hipaa	270 (Eligibility Coverage or Benefit Inquiry)
X12_271EligibCoverageBenefitInfo_004010X092_00_hipaa	271 (Eligibility Coverage or Benefit Information)
X12_276HealthCareClaimStatusRequest_004010X093_00_hipaa	276 (Health Care Claim Status Request)
X12_277HealthCareClaimStatusNotification_004010X093_00_hipaa	277 (Health Care Claim Status Notification)

Table 92 HIPAA Transactions (May 2000) Provided with e*Xchange (Continued)

File Name	Transaction
X12_278HealthCareServicesReviewInfo_004010X094_00_hipaa_a1	278 (Health Care Services Review Information: Request for Review)
X12_278HealthCareServicesReviewInfo_004010X094_00_hipaa_a3	278 (Health Care Services Review Information: Response to Request)
X12_820PaymentOrderRemittanceAdvice_004010X061_00_hipaa	820 (Payment Order Remittance Advice)
X12_834BenefitEnrollmentandMaintenance_004010X095_00_hipaa	834 (Benefit Enrollment and Maintenance)
X12_835HealthCareClaimPaymentAdvice_004010X091_00_hipaa	835 (Health Care Claim Payment Advice)
X12_837HealthCareClaim_004010X096_00_hipaa_q3	837 (Health Care Claim: Professional)
X12_837HealthCareClaim_004010X097_00_hipaa_q2	837 (Health Care Claim: Dental)
X12_837HealthCareClaim_004010X098_00_hipaa_q1	837 (Health Care Claim: Institutional)

16.10.2 Complete HIPAA Transaction ETDs

In addition to the standard e*Xchange format files, installation also includes a version of the HIPAA ETD files which include the GS/GE and ISA/IEA enveloping. These are suitable for use outside e*Xchange Partner Manager when a complete Event structure is required; for example, when translating from X12 to a business application's proprietary data format.

These files are stored in the same location as the standard e*Xchange format HIPAA files. The file names have “_xlate” (for May 1999 files) or “_xlat” (for May 2000 files) appended to the file name to indicate that these are the translation files and include the interchange control and functional group header and footer.

Note: These files use dynamic delimiters, and can only be used in translating from X12 to a proprietary format.

May 1999 Files

For the May 1999 HIPAA implementation, the file names are as follows:

- X12_270EligibCoverageBenefitInquiry_004010X092_hipaa_xlate.ssc
- X12_271EligibCoverageBenefitInfo_004010X092_hipaa_xlate.ssc
- X12_276HealthCareClaimStatusRequest_004010X093_hipaa_xlate.ssc
- X12_277HCClaimStatusNotification_004010X093_hipaa_xlate.ssc
- X12_278HCServicesReviewInfo_004010X094_hipaa_a1_xlate.ssc

- X12_278HCServicesReviewInfo_004010X094_hipaa_a3_xlate.ssc
- X12_820PaymentOrderRemittanceAdvice_004010X061_hipaa_xlate.ssc
- X12_834BenefitEnrollmentandMaint_004010X095_hipaa_xlate.ssc
- X12_835HealthCareClaimPaymentAdvice_004010X091_hipaa_xlate.ssc
- X12_837HealthCareClaim_004010X098_hipaa_q1_xlate.ssc
- X12_837HealthCareClaim_004010X097_hipaa_q2_xlate.ssc
- X12_837HealthCareClaim_004010X096_hipaa_q3_xlate.ssc

May 2000 Files

For the May 2000 HIPAA implementation, the file names are as follows:

- X12_270EligibCoverageBenefitInquiry_4010X092_00_hipaa_xlat.ssc
- X12_271EligibCoverageBenefitInfo_4010X092_00_hipaa_xlat.ssc
- X12_276HealthCareClaimStatusRequest_4010X093_00_hipaa_xlat.ssc
- X12_277HCClaimStatusNotification_4010X093_00_hipaa_xlat.ssc
- X12_278HCServicesReviewInfo_4010X094_00_hipaa_a1_xlat.ssc
- X12_278HCServicesReviewInfo_4010X094_00_hipaa_a3_xlat.ssc
- X12_820PaymentOrderRemittanceAdvice_4010X061_00_hipaa_xlat.ssc
- X12_834BenefitEnrollmentandMaint_4010X095_00_hipaa_xlat.ssc
- X12_835HealthCareClaimPaymentAdvice_4010X091_00_hipaa_xlat.ssc
- X12_837HealthCareClaim_4010X098_00_hipaa_q1_xlat.ssc
- X12_837HealthCareClaim_4010X097_00_hipaa_q2_xlat.ssc
- X12_837HealthCareClaim_4010X096_00_hipaa_q3_xlat.ssc

16.10.3 Translating from a Proprietary Format to HIPAA

The files listed above work for translation from X12 to a proprietary format. However, if you want to translate messages from a proprietary format to X12, you must manually set the delimiters so that they can be read by e*Xchange.

There are two ways to do this:

- Create another version of the ETD file for the appropriate transaction, and then edit the default delimiters. Be sure to save the .ssc file under a new file name.
- Change the dynamic delimiters to static delimiters in the .tsc file. To do this, follow the steps given below.

To redefine the delimiters in the .tsc file

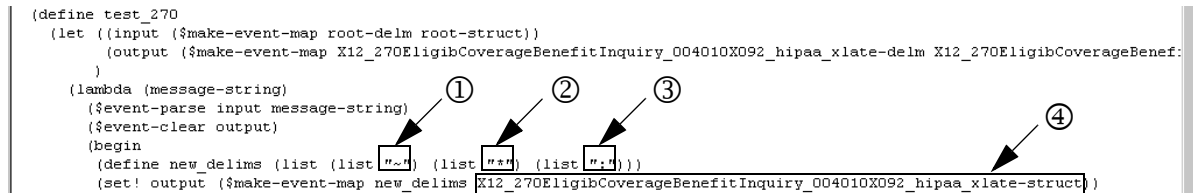
- 1 Open up the .tsc file in the e*Gate Collaboration Rules Editor.
- 2 Edit the delimiters in the Function line of the Collaboration.
- 3 Change the output structure using the new delimiters.

The translation structure name must match the name of the translation structure used in the .ssc file referenced by this .tsc file. An example of an .ssc file is shown in Figure 152 (this example matches the .tsc file shown in Figure 151).

4 Do the mapping.

You can check the results of your changes by opening up the .tsc file in a text editor. The part of the file in which you defined the new delimiters should look similar to the code shown in Figure 151; your edits add the last two lines to your .tsc file.

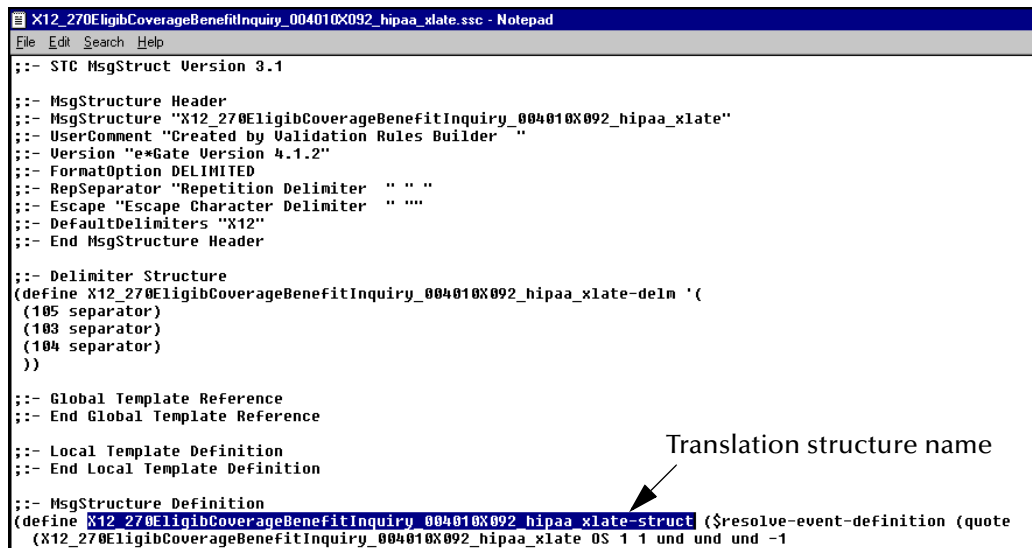
Figure 151 HIPAA Transactions tsc File Shown in Text Editor



```
(define test_270
  (let ((input ($make-event-map root-delm root-struct))
        (output ($make-event-map X12_270EligibCoverageBenefitInquiry_004010X092_hipaa_xlate-delm X12_270EligibCoverageBenefitInquiry_004010X092_hipaa_xlate-struct)))
    (lambda (message-string)
      ($event-parse input message-string)
      ($event-clear output)
      (begin
        (define new_delims (list (list "~~~") (list "##") (list "+++")))
        (set! output ($make-event-map new_delims X12_270EligibCoverageBenefitInquiry_004010X092_hipaa_xlate-struct)))
      )
    )
  )
```

① Segment delimiter
② Data element separator
③ Component separator
④ Translation structure name

Figure 152 Translation Structure Name in .ssc File



```
STC MsgStruct Version 3.1

MsgStructure Header
MsgStructure "X12_270EligibCoverageBenefitInquiry_004010X092_hipaa_xlate"
UserComment "Created by Validation Rules Builder"
Version "e*Gate Version 4.1.2"
FormatOption DELIMITED
RepSeparator "Repetition Delimiter" ""
Escape "Escape Character Delimiter" ""
DefaultDelimiters "X12"
End MsgStructure Header

Delimiter Structure
(define X12_270EligibCoverageBenefitInquiry_004010X092_hipaa_xlate-delm '(
  (105 separator)
  (103 separator)
  (104 separator)
))

Global Template Reference
End Global Template Reference

Local Template Definition
End Local Template Definition

MsgStructure Definition
(define X12_270EligibCoverageBenefitInquiry_004010X092_hipaa_xlate-struct ($resolve-event-definition (quote
  (X12_270EligibCoverageBenefitInquiry_004010X092_hipaa_xlate 05 1 1 und und und -1
```

Translation structure name

5 When done, save your changes and close the text editor.

16.10.4 Tracking Responses to 276 HIPAA Transactions

e*Xchange Partner Manager can only relate a specific 276 claim with its 277 response message if the claims in the ST/SE segment of the 277 Health Care Claim Status

Notification response message are in the same sequence as the claims in the ST-SE segment of the original 276 Health Care Claim Status Request.

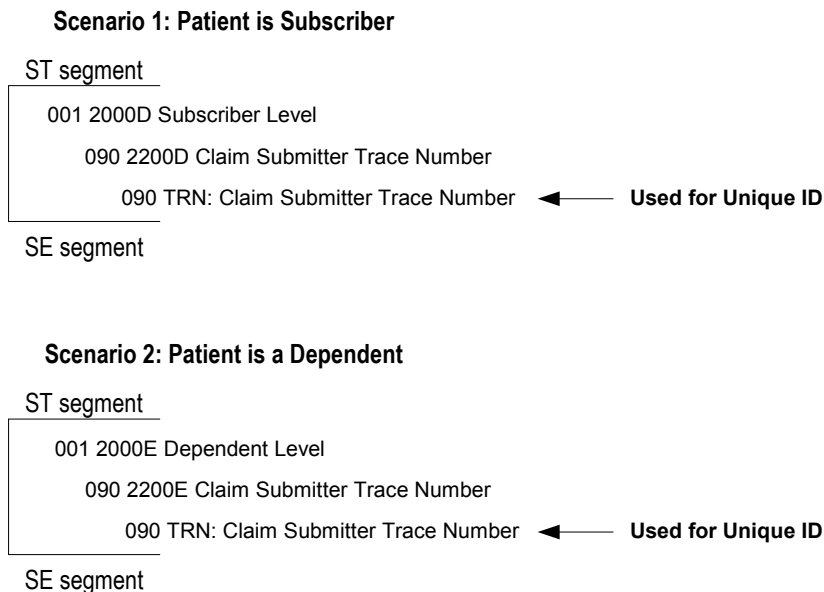
If the response claims will *not* be in the same position in the ST-SE segment as the original 276 claims, do not specify 277 as the expected return transaction. e*Xchange Partner Manager will correctly process the response 277 and forward it; however, the Ack Monitor will continue polling for the response even after it has arrived; and it will eventually error out, since it cannot associate the response with the original message. Instead, do not specify a return message.

16.10.5 Modifying the Unique ID for 276 and 277 Transactions

In the 276 and 277 HIPAA files provided with e*Xchange, the unique ID is based on either the first TRN_02 value for the first subscriber (if the patient is also the subscriber) or the first TRN_02 value from the first dependent (if the patient is not the subscriber).

The segments used for the unique ID are illustrated in Figure 153.

Figure 153 Segments Used for Unique ID in HIPAA 276 and 277 Transactions



If you want to use a different unique ID, you must modify the code in the .tsc file.

The code that is currently used for the 276 (line 12465) is as follows:

```
(if (node-has-data?
~input%X12_276HealthCareClaimStatusRequest_004010X093_00_hipaa.Loop_2
000A_10[0].Loop_2000B_25[0].Loop_2000C_40[0].Loop_2000D_55[0].Loop_22
00D_63[0].TRN_63_Trace.TRN_2_ReferenceIdentification)
(begin
(vector-set! uid_vec 0 (get
~input%X12_276HealthCareClaimStatusRequest_004010X093_00_hipaa.Loop_2
000A_10[0].Loop_2000B_25[0].Loop_2000C_40[0].Loop_2000D_55[0].Loop_22
00D_63[0].TRN_63_Trace.TRN_2_ReferenceIdentification))
)
```

```
(begin
  (vector-set! uid_vec 0 (get
~input%X12_276HealthCareClaimStatusRequest_004010X093_00_hipaa.Loop_2
000A_10[0].Loop_2000B_25[0].Loop_2000C_40[0].Loop_2000D_55[0].Loop_20
00E_72[0].Loop_2200E_80[0].TRN_80_Trace.TRN_2_ReferenceIdentification
))
)
)
```

The code that is currently used for the 277 (line 17551) is as follows:

```
(if (node-has-data?
~input%X12_277HealCareClaiStatNoti_004010X093_00_hipaa.Loop_2000A_10[
0].Loop_2000B_36[0].Loop_2000C_64[0].Loop_2000D_90[0].Loop_2200D_98[0
].TRN_98_Trac.TRN_2_RefeIden)
(begin
  (vector-set! uid_vec 0 (get
~input%X12_277HealCareClaiStatNoti_004010X093_00_hipaa.Loop_2000A_10[
0].Loop_2000B_36[0].Loop_2000C_64[0].Loop_2000D_90[0].Loop_2200D_98[0
].TRN_98_Trac.TRN_2_RefeIden))
)
(begin
  (vector-set! uid_vec 0 (get
~input%X12_277HealCareClaiStatNoti_004010X093_00_hipaa.Loop_2000A_10[
0].Loop_2000B_36[0].Loop_2000C_64[0].Loop_2000D_90[0].Loop_2000E_119[
0].Loop_2200E_127[0].TRN_127_Trac.TRN_2_RefeIden))
)
)
```

16.11 Error Handling in X12

If e*Xchange is unable to successfully process an X12 message, the error is handled in one of a number of ways, according to the circumstances.

The various error scenarios and their treatment are shown in Table 93.

Table 93 Error Handling for X12 Messages

Error Scenario	Error Handling
Cannot parse message from external system based on delimiters.	Sends negative TA1, stores the message with only the ISA/IEA segments.
Invalid information in ISA or IEA; missing IEA; extra IEA.	Sends TA1.
Functional error, invalid nodes in ST or SE segments.	Sends negative 997, stores message (ST-SE)
Message fails to map data to the validation structure.	Sends negative 997, stores message (ST-SE)
Message maps to the structure, but validation detects invalid data in the message.	Sends 997 with appropriate information, stores message.
Cannot retrieve the trading partner profile based on the sender ID, receiver ID, version, and functional ID code values in the functional group.	Sends negative TA1, stores the message with only the ISA/IEA segments.

Note: e*Xchange Partner Manager can be set up to routinely send a 997 or other acknowledgment in response to an incoming message (on the Return Inner

*Envelope tab). However, negative messages are automatically generated where errors are encountered whether or not the Return Inner Envelope tab has been set up. Additionally, if 997 has been selected as the normal, expected response to an incoming message on the Return Inner Envelope tab, e*Xchange still only sends out one negative 997 if the message contains errors.*

Setting Up RosettaNet Outer and Inner Envelopes

This chapter provides information on setting up, in e*Xchange Client for Windows, the specific values necessary to successfully send and receive RosettaNet messages to and from a trading partner. It includes information on the following:

- Setting the values for the various headers of a RosettaNet message:
 - ♦ For RNIF 1.1: Preamble, Service Header
 - ♦ for RNIF 2.0: Preamble, Delivery Header, Service Header
- Specifying the communication protocol used to relay the messages.
- Handling errors.

Preamble, Service Header, and Delivery Header values are set up on the **Extended** tab.

Note: *If you are using RosettaNet, you must install the RosettaNet templates provided by SeeBeyond. They are available during e*Gate installation via the “Add-Ons” option. For installation instructions and general information on RosettaNet, refer to the **RosettaNet ETD Library User’s Guide**.*

17.1 Communications Protocols for RosettaNet

The communications protocols supported by e*Xchange Partner Manager for RNIF 1.1 are:

- HTTP
- HTTPS

The communications protocols supported by e*Xchange Partner Manager for RNIF 2.0 are:

- HTTP
- HTTPS

- SMTP

17.1.1 HTTP and HTTPS

The e*Xchange RosettaNet implementation supports the HTTP transfer protocol, both with and without SSL, if you are using the Web interface. If you are using e*Xchange Client for Windows, you can only use HTTP.

To use HTTP with SSL (HTTPS), complete the following setup step in the Web interface:

- At the B2B Protocol level, in the **Message Security** section, enter the signature key information.
- At the B2B Protocol level for both inbound and outbound, in the **Transport Component** section:
 - ♦ Select **HTTPS** as the communications protocol.
 - ♦ In the **URL** box, set the URL to begin with **https://**.

To use HTTP without SSL, complete the following setup steps in e*Xchange Client for Windows:

- At the B2B Protocol level for both inbound and outbound, in the **Transport Component** section:
 - ♦ Select **HTTP** as the communications protocol.
 - ♦ Enter the URL to which the message will be posted, beginning with **http://**.

17.1.2 SMTP

To use SMTP, complete the following setup steps in e*Xchange Client for Windows:

- Inbound and Outbound outer envelope, **Transport Component** tab:
 - ♦ Select **SMTP** as the communications protocol.
 - ♦ Enter the sender and receiver e-mail addresses and the mailhost IP address and port.

17.2 Security in RosettaNet

e*Xchange provides several security features for use with RosettaNet.

17.2.1 Non-Repudiation

If non-repudiation of origin is required, set the NON-REPUDIATION attribute to **Y** in the **Extended** tab for each inner envelope. If non-repudiation is not required, set this flag to **N**.

17.2.2 Digital Signatures (RNIF 1.1 and 2.0)

RNIF 1.1 and 2.0 both use S/MIME for signing RosettaNet business messages.

The RosettaNet PIP indicates whether or not a digital signature is required for a specific message. However, the trading partner agreement can specify that digital signatures are *not* to be used. If there is a conflict between the PIP and the trading partner agreement regarding the use of digital signatures, the trading partner agreement takes precedence.

If digital signatures are to be used, complete the following setup steps:

- Outbound outer envelope: on the **Secure Data Transport** tab, load the Signature Key and enter the Signature Algorithm to be used.
- Inbound outer envelope: on the **Secure Data Transport** tab, load the Signature Verification Certificate.

If digital signatures are *not* to be used, complete the following steps:

- Make sure there are no values set on the **Secure Data Transport** tab for the inbound and outbound outer envelopes.
- Make sure the NON-REPUDIATION attribute in the **Extended** tab for all related inner envelopes is set to N.

17.2.3 Encryption (RNIF 2.0 Only)

Encryption is a new feature offered with RNIF 2.0. In e*Xchange, the level of encryption is set as an extended attribute in the inner envelope, on the **Extended** tab, ENCRYPTION TYPE attribute.

There are three choices:

- 0—No encryption
- 1—encryption of Service Content and any attachments
- 2—encryption of Service Header, Service Content, and any attachments

The preamble and delivery header are never encrypted, since they contain information necessary to the correct routing of the message.

Encryption of Inbound Messages

For an inbound message, e*Xchange uses the encryption setting from the partner profile to determine which parts of the inbound message have been encrypted. If the message does not have the correct portions encrypted, e*Xchange goes into the error handling process.

For more information on how e*Xchange handles errors with RosettaNet messages, refer to [“RosettaNet Error Handling” on page 321](#).

Encryption of Outbound Messages

For an outbound message, e*Xchange encrypts the message according to the encryption setting specified in the partner profile.

17.3 Entering Envelope Properties

Once you have set up basic information at the Company and Trading Partner levels, the next step is to enter the specific technical information required to successfully send messages to the trading partner and receive messages from the trading partner. For each outer envelope, this includes the following steps:

Defining outer envelopes—two for each eBusiness protocol; one for outbound messages, one for inbound messages. This includes the following:

- Defining general information for the outer envelope
- Defining attributes for the specific eBusiness protocol, for the outer envelope, in the **Extended** tab
- Defining messaging information on the **Transport Component** tab
- If applicable, defining contacts, notes and action items, and security for the outer envelope

Defining inner envelopes—one for each type of business or action message to be sent to the trading partner, under the “Outbound” outer envelope; one for each type of message to be received from the trading partner, under the “Inbound” outer envelope. For each inner envelope, this includes the following:

- Defining general information for the inner envelope
- Defining extended attributes for the inner envelope
- Defining the return inner envelope, if the message would normally trigger a response message
- If applicable, defining contacts, notes and action items, and security for the inner envelope

17.3.1 Extended Envelope Attributes for RosettaNet

Extended attributes contain the specific attributes that are required by e*Xchange Partner Manager to build RosettaNet messages as needed for your business. e*Xchange provides extended attribute templates for RosettaNet Implementation Framework (RNIF) versions 1.1 and 2.0. However, you must provide the values yourself.

For RosettaNet, attributes such as the Global Process Code and Global Business Identifier are set up as extended attributes.

Attribute definitions are loaded as part of installation. You can specify default values via the **Functions** menu, **System Administration**, **Partner Manager Envelope Setup**.

When setting up the attributes for each trading partner, you can change the default values if needed.

Before setting up the attributes, or any other aspect of the trading partner setup, it is important to have the trading partner agreement for each of your trading partners, and ideally the name, address, and telephone number of the eBusiness integration contact for each trading partner. Having this information immediately available will help ensure smooth and accurate setup.

17.3.2 Defining Envelopes for All Conditions

When you are setting up RosettaNet outer and inner envelopes, it is very important that you define *all* the action messages that might be possible, under any circumstances including error conditions, for both inbound and outbound. These envelope definitions are required for any positive action messages received or generated by e*Xchange. The exception action messages are also required for error handling conditions at various levels (for outbound) or for receiving exception action messages (for inbound).

Each version, 1.1 and 2.0, has a different set of action messages. Be sure you define all possible outcomes for the version you are using, as follows:

- RNIF 1.1:
 - ♦ Receipt Acknowledgement
 - ♦ Receipt Acknowledgement Exception
 - ♦ Acceptance Acknowledgement
 - ♦ Acceptance Acknowledgement Exception
 - ♦ General Exception
 - ♦ Failure Notification
- RNIF 2.0:
 - ♦ Receipt Acknowledgement
 - ♦ Receipt Acknowledgement Exception
 - ♦ Failure Notification

17.4 Entering Outer Envelope Properties

For each trading partner, you must set up separate outer envelopes for inbound and outbound messages.

If the trading partner uses more than one eBusiness protocol version, set up additional outer envelopes as needed to accommodate each additional version.

The following steps include all the activities needed to add a new outer envelope to the e*Xchange Partner Manager.

To add a RosettaNet outer envelope

- 1 Enter general outer envelope characteristics: see [“Entering General Outer Envelope Characteristics” on page 294](#).
- 2 Enter outer envelope characteristics that are specific to the message standard (extended attributes): see [“Entering Outer Envelope Extended Attributes” on page 296](#).
- 3 Enter information specific to the transport component of the outer envelope: see [“Entering Transport Component Information” on page 299](#).
- 4 Optional: define contacts, notes and action items, and security for the outer envelope see [“Defining Contacts, Notes, Action Items, and User Security” on page 304](#).

To finish adding a trading partner profile, you must also define an inner envelope for each type of message you will be sending to the trading partner, and one for each type of message you will be receiving from the trading partner. This is explained in [“Entering Inner Envelope Properties” on page 305](#).

17.4.1 Entering General Outer Envelope Characteristics

Use the **General** tab for entering general information that will identify the structure and content of the outer envelope, such as the eBusiness protocol used, message direction, and protocol version.

To enter general outer envelope characteristics


- 1 In the left pane of the Partner Manager window, select the name of the trading partner for which you want to create an outer envelope definition.
- 2 Click **New Outer Envelope** .
The **New Outer Envelope** dialog box appears (see Figure 154).
- 3 Record the outer envelope information on the **General** tab of the **New Outer Envelope** dialog box. For more information, see Table 94.
- 4 Continue to [“Entering Outer Envelope Extended Attributes” on page 296](#).

Figure 154 New Outer Envelope, General Tab (RosettaNet)

The screenshot shows the 'New Outer Envelope' dialog box with the 'General' tab selected. The 'eBusiness Protocol' is set to 'RosettaNet'. The 'Direction' and 'Version' fields are empty. The 'Status' is set to 'Active'. The 'Logical Name' is empty. The 'Description' is 'RosettaNet-'. The 'Trading Partner' is 'Baxter Trading'. The 'Created By' and 'Created Time' fields are empty. The 'OK', 'Cancel', 'Apply', and 'Help' buttons are at the bottom.

Table 94 General Outer Envelope Characteristics

Name	Description
eBusiness Protocol	The name of the eBusiness protocol that is used to format the messages and related transmission information that you send to or receive from the trading partner; RosettaNet, X12, UN/EDIFACT, or BizTalk. Select RosettaNet . After you save the new outer envelope, you cannot change the protocol.
Direction	You must define separate outer envelopes for inbound and outbound messages. This box indicates the direction for the current envelope: Inbound —For messages coming in from a trading partner. Outbound —For messages going out to a trading partner.
Version	The version number of the eBusiness protocol in use. For RosettaNet, the choices are 1.1 or 2.0. All protocol versions that have been set up in Partner Manager Envelope Setup are available on the drop-down selection list. Note: After you save the new outer envelope, you cannot change the protocol version.

Table 94 General Outer Envelope Characteristics (Continued)

Name	Description
Status	<p>The status of the outer envelope. Only one inbound and one outbound outer envelope can be active for each combination of trading partner, eBusiness protocol, direction, and version.</p> <p>Note: The e*Xchange back end only processes messages for active profiles. Inactive outer envelopes are not displayed in the left pane of the Partner Manager window if the administrator has selected the Show Only Active TP check box in System Defaults.</p> <p>Choose one of the following values.</p> <p>Active—The outer envelope is currently active, and can be used.</p> <p>Inactive—The outer envelope is not active, and cannot be used.</p> <p>Default: Active.</p> <p>Note: If the status is Inactive and you cannot change it, this means that the setting has been made at the Trading Partner level.</p>
Logical Name	<p>A unique value that you specify for the trading partner. There are two important conditions for the logical name:</p> <ul style="list-style-type: none"> It must be unique for each outer envelope. If you have only one outer envelope per company, you can use the company name. You could also use a numerical value, or any other value as long as it is unique. For outbound messages, this is the primary value used when e*Xchange receives a message from an internal system to identify the trading partner to which the message is routed. The value in this field must be identical, including case, to the value set the eX_Standard_Event structure's Partner Name node. For more information, refer to the <i>e*Xchange Partner Manager Implementation Guide</i>.
Description	The description of the outer envelope. Default: The eBusiness protocol name, version, and direction, separated by hyphens.
Trading Partner	The name of the trading partner associated with this outer envelope is displayed.
Created By	The user ID of the person who saved or updated this outer envelope is displayed.
Created Time	The date and time this outer envelope definition was saved or updated are automatically displayed when the record is saved.

17.4.2 Entering Outer Envelope Extended Attributes

You must set up certain RosettaNet header values as extended attributes at the outer envelope level.

Predefined extended attributes are preloaded during installation, but can be changed if needed.

To enter default outer envelope extended attribute values

Before you begin, complete [“Entering General Outer Envelope Characteristics” on page 294](#).

Note: For information on specific extended attributes provided with e*Xchange Partner Manager, see [“RosettaNet Attributes—Outer Envelope” on page 298](#).

- 1 On the **New Outer Envelope** dialog box, click the **Extended** tab.

The **Extended** tab appears, as shown in Figure 155 (for RNIF 1.1) and Figure 156 (for RNIF 2.0).

Figure 155 New Outer Envelope, Extended Tab (RNIF 1.1)

Attribute Name	Value	Min Size	Max Size	Created
GLOBAL ADMINISTERING AUTHORITY CODE	RosettaNet	1	300	
GLOBAL USAGE CODE		1	300	
RNIF VERSION IDENTIFIER	1.1	1	300	
FROM GLOBAL BUSINESS IDENTIFIER		1	300	
TO GLOBAL BUSINESS IDENTIFIER		1	300	

Figure 156 New Outer Envelope, Extended Tab (RNIF 2.0)

Attribute Name	Value	Min Size	Max Size	Created
USAGE CODE	1	1	255	
FROM PARTNER BUSINESS IDENTIFIER	1	1	255	
TO PARTNER BUSINESS IDENTIFIER	1	1	255	
INCLUDE DEBUG HEADERS? [Y/N]	N	1	1	

- 2 Enter the appropriate values for the attributes defined by your administrator. If defaults have been set, these are displayed; however, they can be changed.
For more information on the individual attributes, refer to Table 95.
- 3 Continue to [“Entering Transport Component Information” on page 299](#).

17.4.3 RosettaNet Attributes—Outer Envelope

The tables below show RosettaNet attributes that are set up at the Outer Envelope level:

- RNIF 1.1—Table 95
- RNIF 2.0—Table 96

Table 95 Default RNIF 1.1 Extended Attributes (Outer Envelope Layer)

Attribute Description	Additional Information
GLOBAL ADMINISTERING AUTHORITY CODE	(Required) The Global Administering Authority Code is RosettaNet.
GLOBAL USAGE CODE	(Required) There are two acceptable values for the Global Usage Code: Test or Production.
RNIF VERSION IDENTIFIER	(Required) The RNIF version number: 1.1 or 2.0

Table 95 Default RNIF 1.1 Extended Attributes (Outer Envelope Layer)

Attribute Description	Additional Information
FROM GLOBAL BUSINESS IDENTIFIER	(Required) The sender's unique business identifier. RosettaNet identifies this as the DUNS number; e*Xchange does not enforce the use of a DUNS number.
TO GLOBAL BUSINESS IDENTIFIER	(Required) The receiver's unique business identifier. RosettaNet identifies this as the DUNS number; e*Xchange does not enforce the use of a DUNS number.

Table 96 Default RNIF 2.0 Extended Attributes (Outer Envelope Layer)

Attribute Description	Additional Information
USAGE CODE	(Required) The Global Usage Code. There are two acceptable vales: Test or Production.
FROM PARTNER BUSINESS IDENTIFIER	The sender's unique business identifier. RosettaNet identifies this as the DUNS number; e*Xchange does not enforce the use of a DUNS number.
TO PARTNER BUSINESS IDENTIFIER	The receiver's unique business identifier. RosettaNet identifies this as the DUNS number; e*Xchange does not enforce the use of a DUNS number.
INCLUDE DEBUG HEADERS?	A Yes/No setting that determines whether debug headers are included with the message when it is sent via the HTTP, HTTPS, or SMTP protocols.

17.4.4 Entering Transport Component Information

You must specify the communications protocol by which RosettaNet messages will be sent, and provide information required by the protocol.

To add transport component information

- 1 On the **New Outer Envelope** dialog box, click the **Transport Component** tab.
- 2 The **Transport Component** tab appears (see Figure 157).
- 3 Select the communications protocol.

The list of values required for the communications protocol changes according to your selection.

- 4 Fill in the appropriate values. For more information, see Table 97.
- 5 Click **Apply**.

If you entered a password, the **Confirm Password** dialog box appears.

6 Confirm the password.

Type the password exactly as you typed it in the **Password** box, and then press **Enter**. The password field is case-sensitive, even if your database is not; make sure you use the correct capitalization.

Note: Password confirmation is only to avoid errors, not for security purposes. Anyone with access to this dialog box can change the password at any time. You do not need to know the old password to change to a new one.

7 Continue to “[Entering Secure Data Transport Information](#)” on page 301.

Figure 157 New Outer Envelope, Transport Component Tab

Table 97 Outer Envelope Transport Component Fields

Field Name	Description
Comm Protocol	The communications protocol used for this outer envelope. For RNIF 1.0, only HTTP is a valid choice. For version 2.0, HTTP and SMTP are valid choices for e*Exchange Client for Windows. If you are using the Web interface, HTTPS is also available. HTTP —Messages are transmitted with HTTP. HTTPS —Messages are transmitted using HTTP with SSL (available only via the Web interface). SMTP —Messages are transmitted using the Simple Mail Transfer Protocol.
URL (HTTP or HTTPS)	If comm protocol is HTTP or HTTPS, enter the full URL, including prefix. For example: <ul style="list-style-type: none"> http://www.WebAddress.com https://www.SecureWebAddress.com

Table 97 Outer Envelope Transport Component Fields (Continued)

Field Name	Description
(Outbound only) User Name (HTTP, HTTPS)	The user name to be used to access the host on which messages are stored.
(Outbound only) Password (HTTP, HTTPS)	The password to be used to access the host used for storage and retrieval of messages.
Sender e-Mail Address (SMTP)	The e-mail address of the message sender.
Receiver e-Mail (SMTP)	The e-mail address of the message recipient.
(Outbound only) MailHost/IP Address (SMTP)	The host name of the mail server.
(Outbound only) MailHost Port (SMTP)	The port for the mail server.

17.4.5 Entering Secure Data Transport Information

The eSecurity Manager does not have its own GUI. Instead, its features are coordinated within the e*Xchange Partner Manager through the use of values entered on the **Secure Data Transport** tab of the outer envelope.

If you are using the eSecurity Manager, you must add information about the encryption and signature keys and algorithms being used for outbound messages and the decryption and signature verification keys and certificates being used for inbound messages.

For RNIF 1.1, you can add the values for the signature key, password, and algorithm (outbound) and signature verification (inbound) on this tab.

For RNIF 2.0, you can also add the encryption (outbound) and decryption (inbound) information on this tab.

If the eSecurity Manager component is not loaded, the **Secure Data Transport** tab is still present but some of the fields are not available.

To set secure data transport values

Before you begin, complete [“Entering Transport Component Information” on page 299](#).

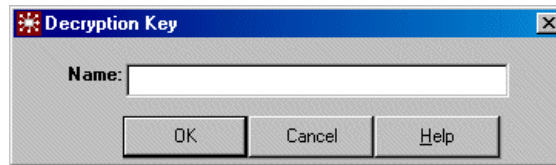
- 1 Enter the value for any required or available keys or certificates.

For more information, see Table 98 (for outbound) or Table 99 (for inbound).

If a file is required, click the **Load File** button.

When entering a key or certificate, a dialog box appears, for entry of the key or certificate name. An example is shown in Figure 158.

Figure 158 Decryption Key



Type the display name of the key or certificate's owner, and then click **OK**. The **Open** dialog box appears.

- 2 At the **Open** dialog box, select the certificate or keypair file.
- 3 Repeat steps 1 and 2 for subsequent keys or certificates.
- 4 (Outbound only) Select the signature—and encryption algorithms if you are using RNIF 2.0—from the drop-down lists.
- 5 Click **Apply** to save.
- 6 If applicable, continue to [“Defining Contacts, Notes, Action Items, and User Security” on page 304](#).

Figure 159 New Outer Envelope, Secure Data Transport Tab (Outbound)

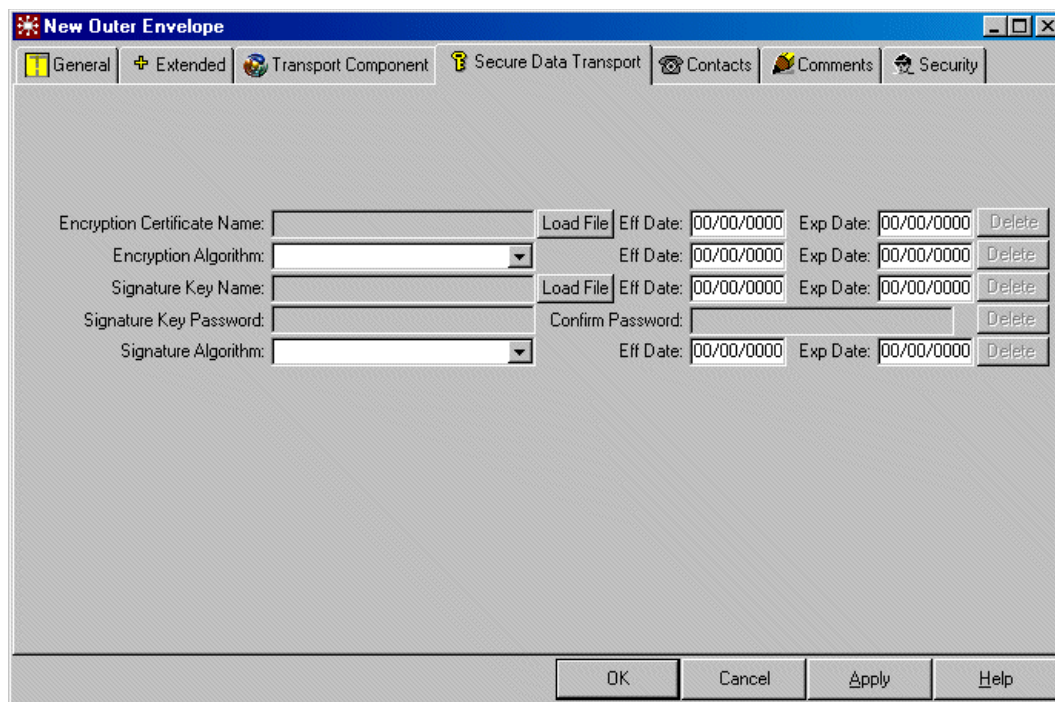


Table 98 Outer Envelope Secure Data Transport (Outbound) Fields

Attribute	Description
Encryption Certificate Name (RosettaNet 2.0 only)	<p>The name of the trading partner's PKCS#7 digital certificate with which the outbound Event will be encrypted.</p> <p>The value recorded in this field must be the exact X.509 "Display Name" field of the certificate file that is being imported.</p> <p>Click the Load File button to access the Encryption Certificate dialog box. Type the name of the certificate, and then click OK. At the Open dialog box, choose the file that contains the certificate. The e*Xchange Partner Manager reads the information from the file and stores it with the trading partner profile in the e*Xchange database (the ES_SECURITY_KEY table) as a BLOB (Binary Large Object).</p> <p>Only the certificate name is displayed; not the file name.</p> <p>Once the information has been stored in the database, the file is no longer needed by e*Xchange for message processing, although it might be stored in a secure location independent of e*Xchange.</p> <p>Set the effective date and expiration date for the encryption certificate.</p>
Encryption Algorithm (RosettaNet 2.0 only)	<p>The block encryption algorithm used to secure the body of Events. Select one of the following values from the drop-down list:</p> <ul style="list-style-type: none"> ▪ DES, 56-Bit KeyCBC (DES_CBC 56-bit encryption) ▪ RC2, 128-Bit Key (RC2_128 128-bit encryption) ▪ RC2, 40-Bit Key (RC2_40 40-bit encryption) ▪ Triple-DES, 168-Bit Key (DES_EDE3_CBC 168-bit encryption) <p>Set the effective date and expiration date for the encryption algorithm.</p>
Signature Key Name	<p>The name of your PKCS#12 public and private key pair with which the outbound Event will be digitally signed.</p> <p>The value recorded in this field must be the exact X.509 "Display Name" field of the keypair file that is being imported.</p> <p>Click the Load File button to access the Signature Key dialog box. Type the name of the key and click OK. At the Open dialog box, choose the file that contains the key. The e*Xchange Partner Manager reads the information from the file and stores it with the trading partner profile in the e*Xchange database (the ES_SECURITY_KEY table) as a BLOB (Binary Large Object).</p> <p>Only the key name is displayed; not the file name.</p> <p>Once the information has been stored in the database, the file is no longer needed by e*Xchange for message processing, although it might be stored in a secure location independent of e*Xchange.</p> <p>Set the effective date and expiration date for the signature key.</p>
Signature Key Password	Type the password for the signature key, if it has one.
Confirm Password	Type the signature key password again, to confirm it.
Signature Algorithm	<p>The digital signature algorithm used to authenticate the content of the Event. Select one of the following values from the drop-down list:</p> <ul style="list-style-type: none"> ▪ RSA MD5 (RSA signature with MD5 message digest) ▪ RSA SHA1 (RSA signature with SHA-1 message digest) <p>Set the effective date and expiration date for the signature algorithm.</p>

Figure 160 New Outer Envelope, Secure Data Transport Tab (Inbound)

Table 99 Outer Envelope Secure Data Transport (Inbound) Fields

Attribute	Description
Decryption Key Name	Enter the name for the decryption key, click Load File , and then select the file containing the key. Set the effective date and expiration date.
Decryption Key Password	Enter the password for the decryption key, and then confirm the password.
Sig Verification Certificate Name	Enter the name for the signature verification certificate, click Load File , and then select the file containing the certificate. Set the effective date and expiration date.

17.4.6 Defining Contacts, Notes, Action Items, and User Security

As part of setting up each component, you have the option to set up the following additional information:

- On the **Contacts** tab—contact information
- On the **Comments** tab—notes and action items
- On the **Security** tab—user access (already inherited from the parent component level, but can be customized for the current outer envelope).

None of this setup is required to save the new outer envelope or to process messages to and from the trading partner. However, each of these tabs provides you with additional capabilities.

Detailed instructions on using each of these tabs is provided in additional chapters, as follows:

Contacts tab—[“Storing Contact Information” on page 210](#)

Comments tab—[“Tracking Notes and Action Items” on page 216](#)

Security tab—[“Assigning Access Privileges to Trading Partner Profiles” on page 225](#)

For information on using these tabs, refer to the appropriate chapter or to the online Help system.

17.5 Entering Inner Envelope Properties

Once you have set up outer envelopes, you can define the specific messages that you will be sending and receiving. These are set up at the inner envelope level.

You must set up a separate inner envelope for each message that will be sent to the trading partner and each message that will be received from the trading partner.

The following steps include all the activities needed to add a new inner envelope. You can perform these steps only if you have the appropriate access rights.

- 1 Enter general inner envelope characteristics: see [“Entering General Inner Envelope Characteristics” on page 305](#)
- 2 Enter inner envelope characteristics that are unique to the eBusiness protocol: see [“Entering Inner Envelope Attribute Values” on page 308](#)
- 3 Optional: define contacts, notes and action items, and security for the outer envelope see [“Defining Contacts, Notes, Action Items, and User Security” on page 316](#).
- 4 When you have set up all inner envelopes, go back and enter information about the return inner envelopes that will be expected in response to each inner envelope: see [“Entering Return Inner Envelope Information” on page 314](#). It is important to set up all envelopes before completing this step; if you do not, the return envelopes will not be available for selection.


When you have completed setting up the inner envelopes, trading partner setup is complete.

Note: *It is very important that you define inner envelopes for all possible conditions that might occur during message processing. For more information, see [“Defining Envelopes for All Conditions” on page 293](#).*

17.5.1 Entering General Inner Envelope Characteristics

To identify the structure and content of the inner envelope so that it can be correctly processed by e*Xchange Partner Manager, you must enter general information such as the protocol version.

To enter general inner envelope characteristics

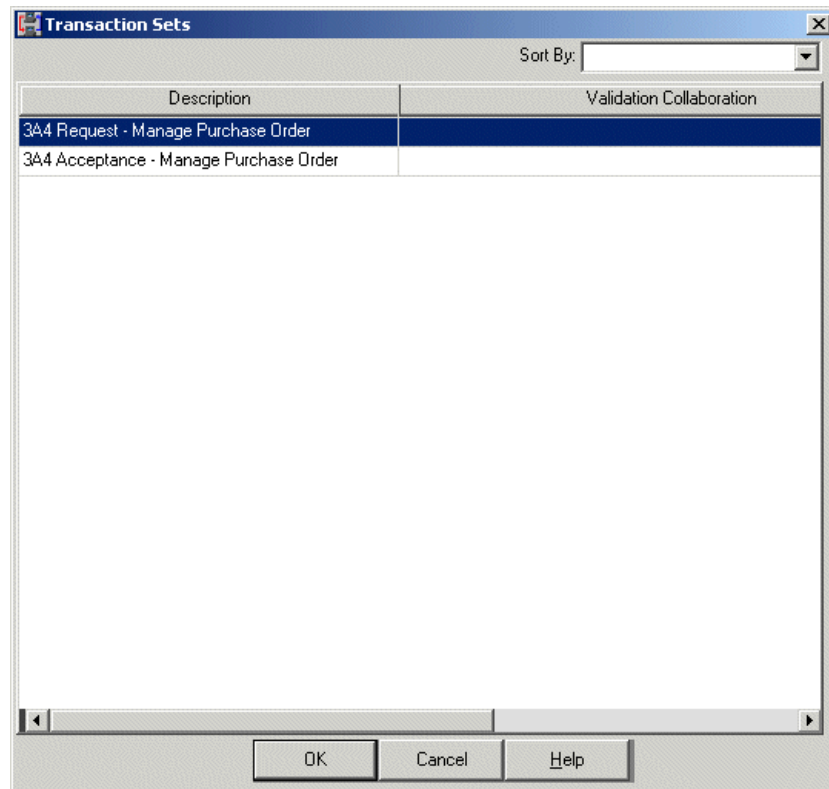
- 1 In the left pane of the Partner Manager window, select the appropriate outer envelope (inbound or outbound).
- 2 Click **New Inner Envelope** .

The **New Inner Envelope** dialog box appears (see Figure 162).
- 3 In the **Version** box, choose the eBusiness protocol that the trading partner is using.

One of two things occurs, according to whether you have inner envelope definitions set up for this RNIF version in the **Inner Envelope Definition Setup** dialog box:

 - ♦ If you have messages set up, the **Transaction Sets** dialog box appears (see Figure 161). Choose an inner envelope definition, and then click **OK** to return to the **General** tab of the **New Inner Envelope** dialog box. The **Description** and **Validation Collaboration** fields are filled in based on your selection.

Figure 161 Transaction Sets (RosettaNet)



- ♦ If you do not have definitions set up, enter the values for **Validation Collaboration** and **Description**. For more information, refer to Table 100.
- 4 Enter the **Transfer Mode**. For RosettaNet, transfer mode is always Interactive. For more information, refer to Table 100.
 - 5 Continue to [“Entering Inner Envelope Attribute Values” on page 308](#).

Figure 162 New Inner Envelope, General Tab (RosettaNet)

The screenshot shows the 'New Inner Envelope' dialog box with the 'General' tab selected. The fields are as follows:

- Version:** 2.0 (with a search icon)
- Transfer Mode:** Interactive
- Alt ID:** (empty text box)
- Status:** Active
- Message Compress:** ☐
- Validation Collaboration:** (empty text box)
- Description:** (empty text box)
- Outer Envelope:** ROS20-PartnerB-Outbound
- Created By:** (empty text box)
- Created Time:** (empty text box)

Buttons at the bottom: OK, Cancel, Apply, Help.

Table 100 General Inner Envelope Characteristics

Field Name	Description
Version	The version number of the eBusiness protocol in use; for example, RNIF 1.1 or 2.0 for RosettaNet. After you save the inner envelope, you cannot modify this value. Once you select from the Transaction Sets dialog box, the Version , Status , Validation Collaboration , Description , and Outer Envelope fields are filled in for you. An icon next to the Version field allows you to reselect from the Transaction Sets dialog box if needed.
Transfer Mode	The way in which the eBusiness messages are transmitted to, or received from, the trading partner. For RosettaNet, this is always Interactive . This means that inner envelopes are created and sent to the trading partner individually in real time.
ALT ID	An alternate identification number for this kind of inner envelope. (Not currently used.)
Status	The status of the inner envelope: Active or Inactive . The e*Xchange Partner Manager back end will not process messages that are inactive. Inactive inner envelopes are not displayed in the left pane of the Partner Manager window if the administrator has selected the Show Only Active TP check box in System Defaults . Note: If the status is Inactive and you cannot change it, this means that the setting has been made at the Trading Partner or Outer Envelope level.

Table 100 General Inner Envelope Characteristics (Continued)

Field Name	Description
Message Compress	Indicates whether the messages should be compressed before they are stored in the database. Default: cleared (inner envelopes are not compressed). Note: If you select this option, the messages are not viewable in the Message Tracking window.
Validation Collaboration	The filename, including path, of the Collaboration that verifies and translates inner envelopes of this type. If you have messages defined in Inner Envelope Definition Setup , the validation Collaboration (if any) is filled in when you select from the Transaction Sets dialog box (Transfer Mode field); but you can modify or delete it. If you do not have messages defined, type the name of the validation Collaboration if applicable. For outbound messages, you might choose not to run validation on the message if you are sure outgoing messages are correct.
Description	The identification number and name of the inner envelope you are defining. If you have messages defined in Inner Envelope Definition Setup , the description is filled in when you select from the Transaction Sets dialog box (Transfer Mode field). If you do not have messages defined, type the description name.
Outer Envelope	The name of the outer envelope associated with this inner envelope is displayed.
Created By	The user ID of the person who created or updated this outer envelope is displayed.
Created Time	The date and time this outer envelope definition was saved or updated are automatically displayed when the record is saved.

17.5.2 Entering Inner Envelope Attribute Values

To record inner envelope characteristics specific to the message standard being used, you must add this information to e*Xchange Partner Manager as a set of extended attributes.

To enter inner envelope extended attribute values

Note: For information on specific extended attributes, see [“RosettaNet Extended Attributes—Inner Envelope” on page 310](#).

- 1 On the **New Inner Envelope** dialog box, click the **Extended** tab.

Figure 163 New Inner Envelope, Extended Tab (RNIF 1.1)

Attribute Name	Value	Min Size	Max Size
GLOBAL TRANSACTION CODE		1	255
GLOBAL BUSINESS ACTION/SIGNAL CODE		1	255
BUSINESS ACTION/SIGNAL VERSION IDENTIFIER		1	255
GLOBAL DOCUMENT FUNCTION CODE		1	255
SIGNAL INSTANCE IDENTIFIER		1	255
GLOBAL PROCESS CODE		1	255
GLOBAL PROCESS INDICATOR CODE		1	255
FROM GLOBAL PARTNER CLASSIFICATION CODE		1	255
FROM GLOBAL PARTNER ROLE CLASSIFICATION		1	255
FROM GLOBAL BUSINESS SERVICE CODE		1	255
TO GLOBAL PARTNER CLASSIFICATION CODE		1	255
TO GLOBAL PARTNER ROLE CLASSIFICATION CODE		1	255
TO GLOBAL BUSINESS SERVICE CODE		1	255
NON-REPUDIATION	N	1	50

OK Cancel Apply Help

Figure 164 New Inner Envelope, Extended Tab (RNIF 2.0)

Attribute Name	Value	Min Size	Max Size
GLOBAL PROCESS CODE(PIP)		1	255
PIP VERSION ID		1	255
ACTIVITY ID		1	255
FROM GLOBAL PARTNER ROLE CLASSIFICATION		1	255
TO GLOBAL PARTNER ROLE CLASSIFICATION CODE		1	255
FROM GLOBAL BUSINESS SERVICE CODE		1	255
TO GLOBAL BUSINESS SERVICE CODE		1	255
GLOBAL BUSINESS ACTION/SIGNAL CODE		1	255
BUSINESS ACTION/SIGNAL VERSION IDENTIFIER		1	255
MESSAGE TYPE [SYNC/ASYN]	ASYN	1	5
ENCRYPTION TYPE [NONE-0, SC+ATTACH-1, SH+0]		1	1
NON-REPUDIATION	N	1	50
DIGITAL SIGNATURE REQUIRED	N	1	50
RETURN TRANSACTION		1	255

OK Cancel Apply Help

- 2 Enter the appropriate attribute values, as required by your business.

For information on specific attributes, refer to Table 101 (RNIF 1.1) and Table 102 (RNIF 2.0).

3 Continue to **“Entering Return Inner Envelope Information” on page 314.**

17.5.3 RosettaNet Extended Attributes—Inner Envelope

The tables below show RosettaNet attributes that are set up at the Inner Envelope level:

- RNIF 1.1—Table 101
- RNIF 2.0—Table 102

Table 101 Default RNIF 1.1 Extended Attributes (Inner Envelope Layer)

Attribute Description	Additional Information
GLOBAL TRANSACTION CODE	The RosettaNet Global Transaction Code. Examples: Process Return Product Request, Confirm Financing, Create Remittance Advice. Click on the magnifying glass icon to select from a list of valid values.
GLOBAL BUSINESS ACTION/SIGNAL CODE	(Required) If the message is a business action: the Global Business Action Code. Possible values: Return Product Request Action, Financing Request Action, Remittance Advice Notification Action. If the message is a signal: the Global Business Signal Code. Possible values: ReceiptAcknowledge. Click on the magnifying glass icon to select from a list of valid values.
BUSINESS ACTION/SIGNAL VERSION IDENTIFIER	(Required) The version number of the message guideline for the business action or signal (RosettaNet version).
GLOBAL DOCUMENT FUNCTION CODE	(Required) The code that indicates the type of document: either Request or Response. For example, for an OA1, Failure Notification, it should be set to Request. Click on the magnifying glass icon to select from a list of valid values.
SIGNAL INSTANCE IDENTIFIER	Not used.
GLOBAL PROCESS CODE	The plain language name for the RosettaNet code assigned to the process; for example, Distribute New Product Information, Query Price and Availability. Click on the magnifying glass icon to select from a list of valid values.
GLOBAL PROCESS INDICATOR CODE	The RosettaNet code assigned to the process; for example, 2A1, 3A2. Click on the magnifying glass icon to select from a list of valid values.

Table 101 Default RNIF 1.1 Extended Attributes (Inner Envelope Layer)

Attribute Description	Additional Information
FROM GLOBAL PARTNER CLASSIFICATION CODE	(Required) The RosettaNet classification code identifying the sender's function in the supply chain: for example, Carrier, Distributor, Manufacturer, or Retailer. Click on the magnifying glass icon to select from a list of valid values.
FROM GLOBAL PARTNER ROLE CLASSIFICATION CODE	(Required) The sender's partner role classification code. This is the code for the partner role that uses product information to create or update enterprise systems and online promotion systems such as electronic catalog systems. Examples of valid codes are Buyer, Seller, Customer Manager, Supplier, Shipment Information User. Click on the magnifying glass icon to select from a list of valid values.
FROM GLOBAL BUSINESS SERVICE CODE	The sender's Global Business Service Code, which is the RosettaNet code for the business service: for example, Product Information Distributor Service, Seller Service, Product Supplier Service, or Buyer Service. Click on the magnifying glass icon to select from a list of valid values.
TO GLOBAL PARTNER CLASSIFICATION CODE	(Required) The RosettaNet classification code identifying the receiver's function in the supply chain: for example, Carrier, Distributor, Manufacturer, or Retailer. Click on the magnifying glass icon to select from a list of valid values.
TO GLOBAL PARTNER ROLE CLASSIFICATION CODE	(Required) The receiver's partner role classification code. This is the code for the partner role that uses product information to create or update enterprise systems and online promotion systems such as electronic catalog systems. Examples of valid codes are Buyer, Seller, Customer Manager, Supplier, Shipment Information User. Click on the magnifying glass icon to select from a list of valid values.
TO GLOBAL BUSINESS SERVICE CODE	The receiver's Global Business Service Code, which is the RosettaNet code for the business service: for example, Product Information Distributor Service, Seller Service, Product Supplier Service, or Buyer Service. Click on the magnifying glass icon to select from a list of valid values.

Table 101 Default RNIF 1.1 Extended Attributes (Inner Envelope Layer)

Attribute Description	Additional Information
NON-REPUDIATION	Indicates whether non-repudiation is required for the message: Y or N .
RETURN TRANSACTION	(Display-only)
FAILURE TRANSACTION	Not currently used.
RESPONSE TIME	(Display-only) The time allowed for a response to be received, as entered on the Return Inner Envelope tab .
RESPONSE TIME GRANULARITY	(Display-only) The time period used for the response time setting, as entered on the Return Inner Envelope tab .
NUMBER OF RETRIES	(Display-only) The number of times the message should be resent, if a response is not received, before the message fails. For example, if the message should be sent once and then retried once, the retry setting is 1. This value is set on the Return Inner Envelope tab .

Table 102 Default RNIF 2.0 Extended Attributes (Inner Envelope Layer)

Attribute Description	Additional Information
GLOBAL PROCESS CODE (PIP)	The plain language name for the RosettaNet code assigned to the process; for example, Distribute New Product Information, Query Price and Availability. Click on the magnifying glass icon to select from a list of valid values.
PIP VERSION ID	The version identifier for the PIP.
ACTIVITY ID	The RosettaNet Activity identifier; this field is not currently used in RNIF version 2.0.
FROM GLOBAL PARTNER ROLE CLASSIFICATION CODE	(Required) The sender's partner role classification code. This is the code for the partner role that uses product information to create or update enterprise systems and online promotion systems such as electronic catalog systems. Examples of valid codes are Buyer, Seller, Customer Manager, Supplier, Shipment Information User. Click on the magnifying glass icon to select from a list of valid values.

Table 102 Default RNIF 2.0 Extended Attributes (Inner Envelope Layer)

Attribute Description	Additional Information
TO GLOBAL PARTNER ROLE CLASSIFICATION CODE	(Required) The receiver's partner role classification code. This is the code for the partner role that uses product information to create or update enterprise systems and online promotion systems such as electronic catalog systems. Examples of valid codes are Buyer, Seller, Customer Manager, Supplier, Shipment Information User. Click on the magnifying glass icon to select from a list of valid values.
FROM GLOBAL BUSINESS SERVICE CODE	The sender's Global Business Service Code, which is the RosettaNet code for the business service: for example, Product Information Distributor Service, Seller Service, Product Supplier Service, or Buyer Service. Click on the magnifying glass icon to select from a list of valid values.
TO GLOBAL BUSINESS SERVICE CODE	The receiver's Global Business Service Code, which is the RosettaNet code for the business service: for example, Product Information Distributor Service, Seller Service, Product Supplier Service, or Buyer Service. Click on the magnifying glass icon to select from a list of valid values.
GLOBAL BUSINESS ACTION/SIGNAL CODE	(Required) If the message is a business action: the Global Business Action Code. Possible values: Return Product Request Action, Financing Request Action, Remittance Advice Notification Action. If the message is a signal: the Global Business Signal Code. Possible values: ReceiptAcknowledge. Click on the magnifying glass icon to select from a list of valid values.
BUSINESS ACTION/SIGNAL VERSION IDENTIFIER	(Required) The version number of the message guideline for the business action or signal (RosettaNet version).

Table 102 Default RNIF 2.0 Extended Attributes (Inner Envelope Layer)

Attribute Description	Additional Information
MESSAGE TYPE [SYNC/ASYNC]	(HTTP/HTTPS only) Inbound —Indicates whether the incoming message is synchronous or asynchronous. Outbound —Indicates whether the message should be sent out as synchronous or asynchronous. Note: When setting up a broadcast message that is not expecting any response, either receipt acknowledgment or business message (for example, a catalog update), if you are using HTTP, make sure you select asynchronous. If you select a synchronous transfer mode, the trading partner returns an empty string, which causes errors.
ENCRYPTION TYPE	The type of encryption to be used in the message. Enter one of the following values: <ul style="list-style-type: none"> 0—no encryption 1—encryption of Service Content and any attachments 2—encryption of Service Header, Service Content, and any attachments The preamble and delivery header are never encrypted.
NON-REPUDIATION	Indicates whether non-repudiation is required for the message: Y or N .
DIGITAL SIGNATURE REQUIRED	Indicates whether a digital signature is required: Y or N .
RETURN TRANSACTION	(Display-only)
RESPONSE TIME	(Display-only) The time allowed for a response to be received, as entered on the Return Inner Envelope tab .
RESPONSE TIME GRANULARITY	(Display-only) The time period used for the response time setting, as entered on the Return Inner Envelope tab .
NUMBER OF RETRIES	(Display-only) The number of times the inner envelope should be resent, if a response is not received, before the message fails. For example, if the message should be sent once and then retried once, the retry setting is 1. This value is set on the Return Inner Envelope tab .

17.5.4 Entering Return Inner Envelope Information

You must specify the inner envelope or envelopes that will be expected in response to the current inner envelope. You can select more than one return inner envelope.

Note: If the appropriate return inner envelopes are not available for selection, some additional setup is required. Refer to [“About Return Inner Envelopes” on page 316](#).

To enter return inner envelope information

Before you begin, complete [“Entering Inner Envelope Attribute Values” on page 308](#).

- 1 On the **New Inner Envelope** dialog box, click the **Return Inner Envelope** tab.

Figure 165 New Inner Envelope, Return Inner Envelope Tab

Version	Description	Include	Response Time	Period	# of Retries
2.0	0A1 Notification - Notification of Failure	<input type="checkbox"/>			
2.0	3A4 Request - Manage Purchase Order	<input type="checkbox"/>			
2.0	Business Signal - General Exception	<input type="checkbox"/>			
2.0	Business Signal - Receipt Acknowledge	<input type="checkbox"/>			
2.0	Business Signal - Receipt Acknowledge Exception	<input type="checkbox"/>			

OK Cancel Apply Help

All eBusiness messages that have already been defined for this trading partner, for the opposite direction, are listed.

- 2 For each listed message type that might be returned by the trading partner (for outbound messages), or for each message type that you might return to the trading partner (for inbound messages), do the following:

- ♦ Check the **Include** check box.

Note: Even though Negative Ack eBusiness messages must be defined in each direction for each trading partner, do not select these as an expected response. Only select response eBusiness messages that occur in the Go path of an eBusiness message exchange. For RosettaNet, you should never select a RosettaNet Receipt Ack Exception as the expected return inner envelope.

- ♦ Set the response time and period that will be acceptable for receiving the return envelope; for example, a response time of 24 and period of hours means that a return inner envelope should be received within 24 hours. If the return

envelope is not received within the preset time period, the message is resent for the preset number of times (as set in the **# of Retries** field).

- ♦ Set the number of times the inner envelope should be resent if a response is not received before the envelope is recorded as a failed message. For example, if the message should be sent once and then retried once if the return inner envelope is not received, the retry setting would be 1.

Note: For RosettaNet 1.1, if the inbound Action Message requires an Acceptance Acknowledgment, you must set up the internal system so that it responds properly. e*Xchange does not generate an Acceptance Acknowledgment or Acceptance Acknowledgment Exception automatically. It generates only the Receipt Acknowledgment and Receipt Acknowledgment Exception business signals and the Failure Notification action message.

Since the business content must be validated before an Acceptance Acknowledgment is generated, it must be originated by an internal application and sent to e*Xchange to be forwarded to the trading partner.

17.5.5 About Return Inner Envelopes

The e*Xchange Partner Manager allows you to specify one or more return inner envelopes that will be valid for a specific incoming or outgoing inner envelope. However, some setup is required before the correct selections are available on the **Return Inner Envelope** tab. You must create all inner envelopes for the trading partner, both inbound and outbound, so that the correct selections will be available to you.

For example, suppose you are using RNIF 1.1 and have a trading partner, ABC Company. You will receive only a 3A2, Price and Availability Query, from this trading partner. In response you send a 3A2 Price and Availability Response. Receipt Acknowledgment signals are sent out upon receipt of message in either direction. This scenario is illustrated in [“RosettaNet Scenario” on page 391](#).

To set this up, do the following:

- In **Inner Envelope Definition Setup**, for the RNIF version, define each of these three messages.
- Define outbound inner envelopes for 3A2 Price and Availability Response and Acknowledgment Signal.
- Define inbound inner envelopes for 3A2 Price and Availability Query Action and Acknowledgment Signal. Because you defined the outbound envelope first, the 3A2 Price and Availability Response and the Acknowledgment Signal are available for selection on the **Return Inner Envelope** tab.
- Go back to the outbound inner envelope for 3A2 Price and Availability Response. You will now be able to select Acknowledgment Signal as the expected response.

17.5.6 Defining Contacts, Notes, Action Items, and User Security

As part of setting up each component, you have the option to set up the following additional information:

- On the **Contacts** tab—contact information
- On the **Comments** tab—notes and action items
- On the **Security** tab—user access (already inherited from the parent component level, but can be customized for the current outer envelope).

None of this setup is required to save the new outer envelope or to process messages to and from the trading partner. However, each of these tabs provides you with additional capabilities.

Detailed instructions on using each of these tabs is provided in additional chapters, as follows:

Contacts tab—[“Storing Contact Information” on page 210](#)

Comments tab—[“Tracking Notes and Action Items” on page 216](#)

Security tab—[“Assigning Access Privileges to Trading Partner Profiles” on page 225](#)

For information on using these tabs, refer to the appropriate chapter or to the online Help system.

17.6 RosettaNet Message Processing

This section outlines the sequence of events that occurs when a RosettaNet message is processed by e*Xchange. It is broken down as follows:

- RNIF 1.1: Inbound and Outbound
- RNIF 2.0: Inbound and Outbound

17.6.1 RNIF 1.1

Inbound RNIF 1.1 Message Processing

The e*Xchange Partner Manager follows the following sequence of actions in processing an inbound RNIF 1.1 message:

- 1 Identifies the trading partner profile.
- 2 If non-repudiation is required for the message, attempts to verify the signature using the trading partner’s public key.
- 3 Validates the Preamble.
- 4 Validates the Service Header.
- 5 Conditional: If a validation Collaboration (**tsc** file) is specified in the partner profile, validates the Service Content.
- 6 Stores the message in the database.
- 7 Establishes message tracking in the database.

- 8 Conditional: If a Receipt Acknowledgement to the message is required, sends the Receipt Acknowledgement.
- 9 If the message is an action message, forwards it to the internal application.

If there is an error with any of the above steps, e*Xchange generates an error and invokes the error handling routine. For more information on error handling, refer to [“Inbound RNIF 1.1 Error Handling” on page 321](#).

Outbound RNIF 1.1 Message Processing

The e*Xchange Partner Manager follows the following sequence of actions in processing an outbound RNIF 1.1 message:

- 1 Identifies the trading partner for the message.
- 2 Validates the message content if a validation Collaboration is specified.
- 3 Sets the header information based on partner profile.
- 4 Saves the message in the database.
- 5 Establishes message tracking in the database.
- 6 Adds a signature to the message if necessary.
- 7 Forwards the message to the trading partner.

17.6.2 RNIF 2.0

Inbound RNIF 2.0 Message Processing

The e*Xchange Partner Manager follows the following sequence of actions in processing an inbound RNIF 2.0 message:

- 1 Parses the message and outputs a populated RosettaNet event message.
- 2 Loads the inner envelope.
- 3 If the trading partner profile indicates that a signature is required, checks that the signature is there.
- 4 For a response message, loads the message tracking attributes of the associated request message.
- 5 Validates the Preamble.
- 6 Validates the Delivery Header.
- 7 Validates the Service Header.
- 8 Validates the Service Content.
- 9 If there are no errors in any of the prior steps, sends the receipt acknowledgment if one is expected.
- 10 Checks for message duplication.
- 11 Stores the message in the database.

- 12 Establishes message tracking in the database.
- 13 For a response message, associates it with the request message.
- 14 Forwards the message to the internal application.

If there is an error with any of the above steps, e*Xchange generates an error and invokes the error handling routine. For more information on error handling, refer to **“Inbound RNIF 2.0 Error Handling” on page 322.**

Outbound RNIF 2.0 Message Processing

The e*Xchange Partner Manager follows the following sequence of actions in processing an outbound RNIF 2.0 message:

- 1 Validates the outbound header to ensure all the information needed to identify the envelope is present. At this level, e*Xchange just checks that the fields are populated; it does not look at the actual values.
- 2 Checks for duplicates and creates an error if found.
- 3 Loads the inner envelope.
- 4 For a response message, loads the message tracking attributes of the associated request message.
- 5 Populates the Preamble with attributes from the database.
- 6 Populates the Delivery Header with attributes from the database.
- 7 Populates the Service Header with attributes from the database.
- 8 Validates the service content if a validation Collaboration is specified.
- 9 Packs the message into a RosettaNet Business Message string.
- 10 Optional: Encrypts the message if encryption is specified in the trading partner profile.
- 11 Optional: Adds a digital signature if digital signatures are specified in the trading partner profile.
- 12 Stores the business message in the database.
- 13 Creates appropriate rows in the Message Tracking tables and in the database for the ack monitor.
- 14 Associates the response message with the request message.
- 15 Sets the standard event attributes and forwards the message to the trading partner.

If there is an error with any of the above steps, e*Xchange generates an error and invokes the error handling routine. For more information on error handling, refer to **“Outbound RNIF 2.0 Error Handling” on page 323.**

17.7 Acknowledgment Monitoring

This section outlines the steps e*Xchange takes to monitor the sending and receiving of message acknowledgments. It is broken down as follows:

- RNIF 1.1
- RNIF 2.0

Important: *It is a common error to change the status of a trading partner profile to Inactive while there are still messages associated with it that are waiting to be processed. If you change the status to Inactive, the Ack Monitor cannot find the active trading partner profile and therefore cannot process the message correctly. Before changing the status of a profile to Inactive, be sure that all messages associated with the profile have been processed.*

17.7.1 RNIF 1.1

An outbound message might require multiple responses; for example, a Receipt Acknowledgement and an action response. The expected responses are specified in the **Properties** dialog box for the inner envelope, on the **Return Inner Envelope** tab. They can be also specified in the data. The expected responses to an outbound message are flagged in the database and monitored by the Ack Monitor.

The Ack Monitor monitors the database for any overdue responses. When it detects that a response is overdue, it checks the maximum retry count for the message, and then takes one of the following actions:

- If the maximum retry count has not been reached, the Ack Monitor retrieves the original message, increments the Attempt Count in the message, and resends it to the trading partner through e*Xchange.
- If the maximum retry count has been reached, the Ack Monitor sends a RosettaNet Failure Notification to the trading partner and a failure Event to the internal application. A “response overdue” error is assigned to the original message in the database and all its expected responses are canceled.

17.7.2 RNIF 2.0

With RNIF 2.0, the processing logic for the Ack Monitor is similar to that of RNIF 1.1. However, in 2.0 there is no need to change the attempt count field and pack the message again before resending the message.

The Ack Monitor consults the database and creates a list of messages with overdue responses. It then processes each message in turn. For a RosettaNet message, it calls the RosettaNet 2.0 Ack Monitor, eX-ROS20-Ack-Mon, which does the following:

- 1 Retrieves the original message.
- 2 Loads the inner envelope for the original message.
- 3 Loads the message tracking attributes for the original message.

- 4 If the maximum number of retries for the message has already been reached:
 - ♦ Logs an error in Message Tracking
 - ♦ Creates a 0A1 Failure Notification
 - ♦ Packs the 0A1 Notification into a RosettaNet Business Message.
 - ♦ Sends the 0A1 message to the trading partner
 - ♦ Sends a failure message to the internal system
- 5 If the maximum number of retries has *not* been reached:
 - ♦ Resends the message to the trading partner
 - ♦ Updates the Last Send Time and Send Count in the database, and sets a value for the next send time

If there is an error with any of the above steps, e*Xchange generates an error and invokes the error handling routine. For more information on error handling, refer to [“RosettaNet Error Handling” on page 321](#).

17.8 RosettaNet Error Handling

This section outlines the sequence of events that occurs when a e*Xchange encounters a problem with a RosettaNet message. It is broken down as follows:

- RNIF 1.1: Inbound and Outbound
- RNIF 2.0: Inbound and Outbound

In any error situation, e*Xchange always does the following:

- Journals the message
- Sends the message to the error queue, where it can be picked up for further handling
- Sends an Alert message to the e*Gate Monitor

17.8.1 RNIF 1.1

If e*Xchange is unable to successfully map a message to the RosettaNet structure, it generates an error which is recorded in the journal file (the specific file name and location is as specified in the ePM e*Way configuration). e*Xchange also sends an alert notification to the e*Gate Monitor. You can view the journal file from within e*Gate.

Inbound RNIF 1.1 Error Handling

If an inbound message fails content validation, the message is logged in the database at the message level with the error flag set. A Receipt Acknowledgement Exception (or General Exception if the message is not expecting a Receipt Acknowledgement) is sent out to the trading partner.

After the data passes validation, any processing failure causes e*Xchange to send a General Exception to the trading partner if the message expects an action response (for example, a 3A2 query message), or a Failure Notification if the message does not expect an action response (for example, a 3A2 response message).

Outbound RNIF 1.1 Error Handling

If e*Xchange fails on an outbound message, a failure Event is sent to the internal application.

17.8.2 RNIF 2.0

Inbound RNIF 2.0 Error Handling

For an inbound RNIF 2.0 message, e*Xchange generates errors if any of the following conditions occurs:

- The service header cannot be parsed
- A duplicate message is received
- An unexpected message is received

If the error occurs when e*Xchange has not yet sent out an acknowledgment message, a Receipt Acknowledgment Exception is sent to the trading partner.

If the error occurs when e*Xchange has already sent out an acknowledgment message, a generic exception is sent to the trading partner.

Under any of the above conditions, if a receipt acknowledgment has not already been sent, e*Xchange sends a negative acknowledgment instead of a receipt acknowledgment.

If the data has not yet been stored in the database, e*Xchange saves the data with the associated error. If it has already been stored in the database, e*Xchange associates the error with the saved message.

Note: For a RosettaNet inbound message, once the Service Header has been successfully parsed, that means all other values within the message have also been successfully loaded.

Outbound RNIF 2.0 Error Handling

If e*Xchange encounters errors in processing outbound RNIF 2.0 messages, the original RNIF 2.0 generic message received from the internal system is journaled.

According to the type of error, e*Xchange takes the steps outlined in Table 103.

Table 103 RNIF 2.0 Outbound Error Handling

e*Xchange checks for the following conditions...	and takes the following steps...
The data has not been saved.	Saves the data with the associated error.
The data has been saved.	Associates the error with the already saved message.
The message has been sent on to the trading partner.	<ul style="list-style-type: none">▪ Sends a 0A1 to the trading partner.▪ Sends a cancel message to the internal system.
The message has not yet been sent on to the trading partner.	Sends a failure message to the internal system. The next step is then up to the internal system: resend the message, or, if it is a response message, send a General Exception.

Setting Up UN/EDIFACT Outer and Inner Envelopes

This chapter provides information on setting up, in e*Xchange Client for Windows, the specific values necessary to successfully send and receive UN/EDIFACT transactions to and from a trading partner. It includes information on the following:

- Setting the values for:
 - ♦ Interchange envelope (UNB and UNZ segments)
 - ♦ group (UNG and UNE segments)
 - ♦ Message (UNH and UNT segments)
- Specifying the messaging protocol used to relay the messages
- Handling errors

Note: *If you are using UN/EDIFACT, you must install the UN/EDIFACT templates provided by SeeBeyond. They are available during e*Gate installation via the “Add-Ons” option. For installation instructions, refer to the **UN/EDIFACT ETD Library User’s Guide**.*

Note: *The **Secure Data Transport** tab in the Outer Envelope of the trading partner profile is not used by the e*Xchange UN/EDIFACT implementation. This tab is provided as an interface for secure UN/EDIFACT messaging that might be required in the back-end Monk scripts for a custom implementation. If secure UN/EDIFACT messaging is required, the back-end Monk scripts must be significantly customized. Refer to the **e*Xchange Partner Manager Implementation Guide** for information on the Monk APIs that would be used to retrieve the keys and certificates from the database.*

18.1 UN/EDIFACT Enveloping Segment Values

You must enter various parameters required by the UN/EDIFACT enveloping segments so that the e*Xchange Partner Manager can successfully interpret and route messages to and from the trading partner.

Most of the header and trailer segment values are set up as extended attributes on the **Extended** tab at the outer and inner envelope layers. Some other values are counted or tracked automatically by e*Xchange Partner Manager, or are provided by e*Gate.

Generally speaking, envelope layers are broken down as follows:

- **Outer Envelope**—used to set up values specific to the trading partner, but general to all messages to and from the trading partner, such as interchange segment values and delimiters.
- **Inner Envelope**—used to set up values specific to an individual message; functional segments, message segments, and batch settings.

Table 104 shows the values required by the interchange header and footer segments, and shows how the information is recorded in e*Xchange Partner Manager. It either lists the extended attribute name, or otherwise shows how the information is tracked.

Table 104 UN/EDIFACT Interchange Header and Footer Values

POS/TAG	Name	Layer	Extended Attribute Name
UNB Interchange Header			
010/0001	Syntax identifier	Outer	SYNTAX IDENTIFIER
010/0002	Syntax version number	Outer	SYNTAX VERSION
010/0080	Service code list directory version number	Outer	SERVICE CODE LIST DIRECTORY VERSION NUMBER
010/0133	Character encoding, coded	Outer	CHARACTER ENCODING
020/0004	Interchange sender identification	Outer	INTERCHANGE SENDER ID
020/0007	Identification code qualifier	Outer	SENDER ID CODE QUALIFIER
020/0008	Interchange sender internal identification	Outer	INTERCHANGE SENDER INTERNAL ID
020/0042	Interchange sender internal sub-identification	Outer	INTERCHANGE SENDER INTERNAL SUB-ID
030/0010	Interchange recipient identification	Outer	INTERCHANGE RECIPIENT ID
030/0007	Identification code qualifier	Outer	RECIPIENT ID CODE QUALIFIER
030/0014	Interchange recipient internal identification	Outer	INTERCHANGE RECIPIENT INTERNAL ID
030/0046	Interchange recipient internal sub-identification	Outer	INTERCHANGE RECIPIENT INTERNAL SUB-ID
040/0017	Date		The date (this comes from e*Gate)
040/0019	Time		The time (this comes from e*Gate)

Table 104 UN/EDIFACT Interchange Header and Footer Values (Continued)

POS/TAG	Name	Layer	Extended Attribute Name
050/0020	INTERCHANGE CONTROL REFERENCE		A 14-character value constructed from the e*Gate time stamp. The time stamp is YYYYMMDDHHMMSS0XXX. Interchange, group, and message control references in header and footer segments are all constructed in the same way. The reference number excludes the first two and last two characters, so the value is: YYMMDDHHMMSS0X .
060/0022	Recipient reference/ password	Outer	RECIPIENT REFERENCE PASSWORD
060/0025	Recipient reference/ password qualifier	Outer	RECIPIENT REFERENCE QUAL
070/0026	APPLICATION REFERENCE	Outer	APPLICATION REFERENCE
080/0029	PROCESSING PRIORITY CODE	Outer	PROCESSING PRIORITY CODE
090/0031	ACKNOWLEDGMENT REQUEST	Outer	ACKNOWLEDGMENT REQUEST
100/0032	INTERCHANGE AGREEMENT IDENTIFIER	Outer	INTERCHANGE AGREEMENT ID
110/0035	TEST INDICATOR	Outer	TEST INDICATOR
UNZ Interchange Trailer (Footer)			
010/0036	INTERCHANGE CONTROL COUNT		The total number of groups included in the interchange. This is counted automatically by e*Xchange. If there is no group in the message (no UNG/UNE segments), it is the number of messages.
020/0020	INTERCHANGE CONTROL REFERENCE		Same as 050/0020 Interchange Control Reference in UNB (see above).

Table 105 shows the values required by the group header and footer segments, and shows how the information is recorded in e*Xchange Partner Manager. It either lists the extended attribute name, or otherwise shows how the information is tracked.

Table 105 UN/EDIFACT Group Header and Footer Values

Segment	Name	Layer	Extended Attribute Name
UNG Group Header			
010/0038	MESSAGE GROUP IDENTIFICATION		For UN/EDIFACT version 3, e*Xchange uses the value from the MESSAGE TYPE IDENTIFIER extended attribute at the Inner Envelope level.

Table 105 UN/EDIFACT Group Header and Footer Values (Continued)

Segment	Name	Layer	Extended Attribute Name
020/0040	Application sender identification	Inner	APPLICATION SENDER ID CODE
020/0007	Identification code qualifier	Inner	APPLICATION SENDER QUAL
040/0017	Date		The date (this comes from e*Gate)
040/0019	Time		The time (this comes from e*Gate)
050/0048	GROUP REFERENCE NUMBER		A 14-character value constructed from the e*Gate time stamp. The time stamp is YYYYMMDDHHMMSS0XXX. Interchange, group, and message control references in header and footer segments are all constructed in the same way. The reference number excludes the first two and last two characters, so the value is: YYMMDDHHMMSS0X .
060/0051	CONTROLLING AGENCY, CODED		e*Xchange uses the value from the CONTROLLING AGENCY extended attribute (020/0051) at the inner envelope level.
070/0052	Message version number	Inner	MESSAGE TYPE VERSION (this attribute sets the value for Message Version Number in both UNG and UNH).
070/0054	Message release number	Inner	MESSAGE TYPE RELEASE NUMBER (this attribute sets the value for Message Release Number in both UNG and UNH).
070/0057	Association assigned code	Inner	ASSOCIATION ASSIGNED CODE (this attribute sets the value for Association Assigned Code in both UNG and UNH).
080/0058	APPLICATION PASSWORD	Inner	APPLICATION PASSWORD
UNE Group Trailer (Footer)			
010/0060	GROUP CONTROL COUNT		If the message includes the UNG and UNE segments, e*Xchange automatically sets this value to the message count.
020/0048	GROUP REFERENCE NUMBER		Same as 050/0048 Group Reference Number in UNG.

Table 106 shows the values required by the message header and footer segments, and shows how the information is recorded in e*Xchange Partner Manager. It either lists the extended attribute name, or otherwise shows how the information is tracked.

Table 106 UN/EDIFACT Message Header And Footer Values

Segment	Name	Layer	Extended Attribute Name
UNH Message Header			
010/0062	MESSAGE REFERENCE NUMBER		A 14-character value constructed from the e*Gate time stamp. The time stamp is YYYYMMDDHHMMSS0XXX. Interchange, group, and message control references in header and footer segments are all constructed in the same way. The reference number excludes the first two and last two characters, so the value is: YYMMDDHHMMSS0X .
020/0065	Message type	Inner	MESSAGE TYPE IDENTIFIER
020/0052	Message version number	Inner	MESSAGE TYPE VERSION (this attribute sets the value for Message Version Number in both UNG and UNH).
020/0054	Message release number	Inner	MESSAGE TYPE RELEASE NUMBER (this attribute sets the value for Message Release Number in both UNG and UNH).
020/0051	Controlling agency, coded	Inner	CONTROLLING AGENCY
020/0057	Association assigned code	Inner	ASSOCIATION ASSIGNED CODE (this attribute sets the value for Association Assigned Code in both UNG and UNH).
020/0110	Code list directory version number	Inner	CODE LIST DIRECTORY VERSION NUMBER
020/0113	Message type sub-function identification	Inner	MESSAGE TYPE SUB-FUNCTION IDENTIFICATION
030/0068	COMMON ACCESS REFERENCE	Inner	COMMON ACCESS REFERENCE
040/0070	Sequence of transfers	Inner	MESSAGE SEQUENCE NUMBER (in Version 3; this segment does not exist in Version 4)
040/0073	First and last transfer	Inner	MESSAGE TRANSFER INDICATOR
050/0115	Message subset identification	Inner	MESSAGE SUBSET IDENTIFICATION
050/0116	Message subset version number	Inner	MESSAGE SUBSET VERSION NUMBER
050/0118	Message subset release number	Inner	MESSAGE SUBSET RELEASE NUMBER
050/0051	Controlling agency, coded	Inner	MESSAGE SUBSET CONTROLLING AGENCY
060/0121	Message implementation guideline identification	Inner	MESSAGE IMPLEMENTATION GUIDELINE IDENTIFICATION

Table 106 UN/EDIFACT Message Header And Footer Values (Continued)

Segment	Name	Layer	Extended Attribute Name
060/0122	Message implementation guideline version number	Inner	MESSAGE IMPLEMENTATION GUIDELINE VERSION NUMBER
060/0124	Message implementation guideline release number	Inner	MESSAGE IMPLEMENTATION GUIDELINE RELEASE NUMBER
060/0051	Controlling agency, coded	Inner	MESSAGE IMPLEMENTATION GUIDELINE CONTROLLING AGENCY
070/0127	Scenario identification	Inner	SCENARIO IDENTIFICATION
070/0128	Scenario version number	Inner	SCENARIO VERSION NUMBER
070/0130	Scenario release number	Inner	SCENARIO RELEASE NUMBER
070/0051	Controlling agency, coded	Inner	SCENARIO CONTROLLING AGENCY
UNT Message Trailer (Footer)			
010/0074	NUMBER OF SEGMENTS IN A MESSAGE		Counted automatically by e*Xchange: the total number of segments (UNH/UNT) in the message.
020/0062	MESSAGE REFERENCE NUMBER		Same as 010/0062 Message Control Reference in UNH (see above).

18.2 UN/EDIFACT Delimiters

For UN/EDIFACT, delimiters are set up at the outer envelope level, on the **Extended** tab.

It is important to note the specific use of delimiters in the extended attributes and how it affects default use of delimiters in messages processed by the e*Xchange Partner Manager.

Treatment of delimiters in the messages and in the partner profile for both inbound and outbound is explained below.

18.2.1 Inbound

For an inbound message, there are two possible scenarios:

- If the message includes a UNA segment—e*Xchange compares the delimiters defined in the UNA segment with those recorded in the partner profile. If they match, e*Xchange uses those delimiters for the message, and returns an error if they do not match.
- If the message does not include a UNA segment—e*Xchange uses the delimiters specified in the partner profile to parse the message, and returns an error if they do not match.

18.2.2 Outbound

For an outbound message, there are two possible scenarios:

- If the message coming from the internal application includes a UNA segment—e*Xchange uses the delimiters defined in the UNA segment to parse the message, replaces them with the delimiters defined in the partner profile, and sends the message on to the trading partner.
- If the message coming from the internal application does not contain a UNA segment—e*Xchange uses the default UN/EDIFACT delimiters (see Table 107) to parse the message, replaces them with the delimiters defined in the partner profile, and sends the message on to the trading partner.

18.2.3 Default UN/EDIFACT Delimiters

The default delimiters for UN/EDIFACT are shown in Table 107.

Table 107 UN/EDIFACT Default Delimiters

Delimiter Type	Name	Symbol
Segment terminator	Apostrophe	'
Element delimiter	Plus Sign	+
Component data element separator	Colon	:
Release character	Question mark	?
Repetition separator	Asterisk	*

18.3 Transfer Modes in UN/EDIFACT

UN/EDIFACT offers three alternatives in terms of how frequently messages are sent:

- **Interactive (single-item batching in real time)**—messages are sent as soon as they are generated or received. Typically, messages that are used in a real time mode are those that require an immediate response. The sender sends a request message to the receiver and remains connected while the receiver processes the request message and returns a response message.
- **Batch**—messages of different types are sent in groups, called batches. In batch mode, the frequency of batch transmission is normally determined by a user-specified time setting.

Note: Do not confuse this term with the FTP (Batch) communications protocol (for more information, see [“Communications Protocols for UN/EDIFACT” on page 331](#)).

- **Fast Batch**—messages of a certain type are accumulated and sent to the trading partner as a group of messages, all of the same transaction type, at a preset point. Fast batch has one interchange, one group, and a preset number of messages. The point at which a fast batch is sent is determined by the settings in the Standard Event Structure for the inner envelope.

18.3.1 Fast Batch Settings

If you are using Fast Batch, you must set two values in the **eX_Standard_Event.ssc** file:

- Set the value “FB_UNIQUE_ID” (Fast Batch unique ID) in the Name node of the NameValuePair.
- Set the value “FB_COUNT” (Number of records to be included in the batch) in the Value node of the NameValuePair.

Within e*Xchange Partner Manager, the messaging method used is determined at the inner envelope (transaction) level. In the **Inner Envelope** dialog box, the **Transfer Mode** field is set to either Batch, Fast Batch, or Interactive (Real Time).

18.4 Communications Protocols for UN/EDIFACT

The communications protocols supported by e*Xchange Partner Manager for UN/EDIFACT are:

- **FTP (Batch)**
The FTP (Batch) setting at the outer envelope level indicates use of File Transfer Protocol for transmission of messages. Within e*Gate, this uses the e*Xchange BATCH e*Way to transfer files. Files can also be stored on the local machine.
- **HTTP**
This setting indicates use of the HTTP protocol.
- **SMTP**
This setting indicates use of the Simple Mail Transfer Protocol.

18.5 Entering Envelope Properties

Once you have set up a trading partner, the next step is to enter the specific technical information required to successfully send messages to the trading partner and receive messages from the trading partner. This includes the following steps:

Defining outer envelopes—two for each eBusiness protocol; one for outbound messages, one for inbound messages. This includes the following:

- Defining general information for the outer envelope
- Defining extended attributes for the outer envelope

- Defining messaging information on the **Transport Component** tab
- If applicable, defining contacts, notes and action items, and security for the outer envelope

Defining inner envelopes—one for each type of transaction to be sent to the trading partner, under the “Outbound” outer envelope; one for each type of transaction to be received from the trading partner, under the “Inbound” outer envelope. For each inner envelope, this includes the following:

- Defining general information for the inner envelope
- Defining extended attributes for the inner envelope
- Defining the return inner envelope, if the transaction would normally trigger a response transaction
- If applicable, defining contacts, notes and action items, and security for the inner envelope

18.6 Entering Outer Envelope Properties

For each trading partner, you must set up separate outer envelopes for inbound and outbound messages.

If the trading partner uses more than one eBusiness protocol version, set up additional outer envelopes as needed to accommodate each additional version.

The following steps include all the activities needed to add a new outer envelope to the e*Xchange Partner Manager.

To add a UN/EDIFACT outer envelope


- 1 Enter general outer envelope characteristics: see [“Entering General Outer Envelope Characteristics” on page 333](#).
- 2 Enter outer envelope characteristics: see [“Entering Outer Envelope Extended Attributes” on page 335](#).
- 3 Enter information specific to the transport component of the outer envelope: see [“Entering Transport Component Information” on page 339](#).
- 4 Optional: define contacts, notes and action items, and security for the outer envelope see [“Defining Contacts, Notes, Action Items, and User Security” on page 342](#).

To finish adding a trading partner profile, you must also define an inner envelope for each type of message you will be sending to the trading partner, and one for each type of message you will be receiving from the trading partner. This is explained in [“Entering Inner Envelope Properties” on page 342](#).

18.6.1 Entering General Outer Envelope Characteristics

Use the **General** tab for entering general information that will identify the structure and content of the outer envelope, such as the eBusiness protocol used, message direction, and protocol version.

To enter general outer envelope characteristics

- 1 In the left pane of the Partner Manager window, select the name of the trading partner for which you want to create an outer envelope definition.
- 2 Click **New Outer Envelope** .

The **New Outer Envelope** dialog box appears (see Figure 166).
- 3 Record the outer envelope information on the **General** tab of the **New Outer Envelope** dialog box. For more information, see Table 108.
- 4 Continue to [“Entering Outer Envelope Extended Attributes” on page 335](#).

Figure 166 New Outer Envelope, General Tab (UN/EDIFACT)

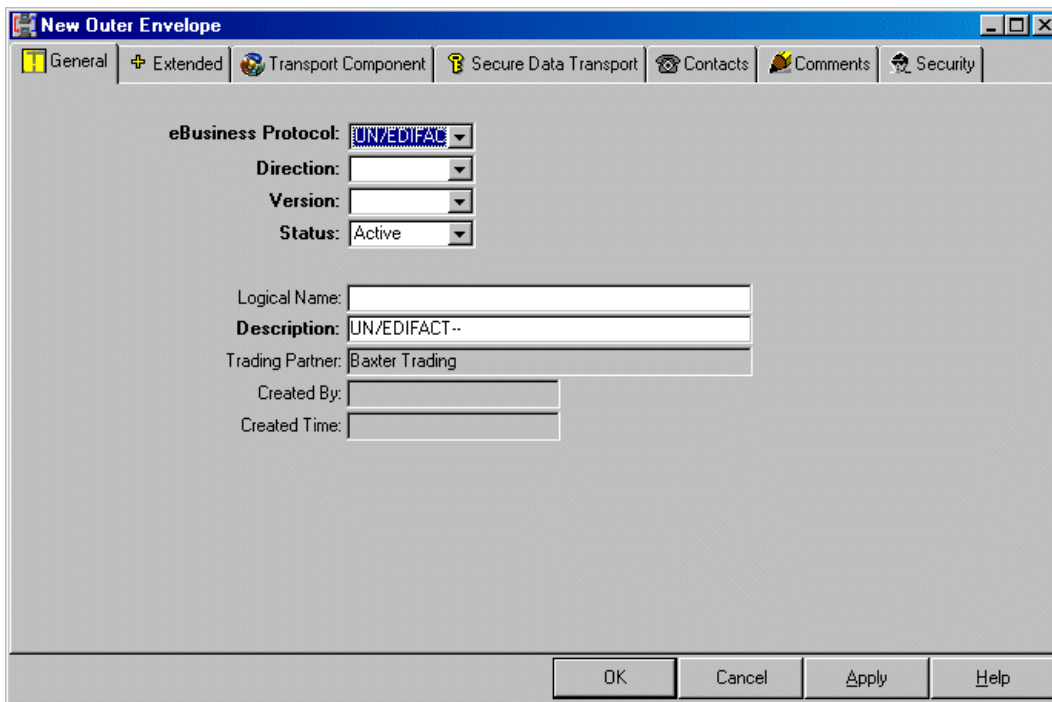


Table 108 General Outer Envelope Characteristics

Field Name	Description
eBusiness Protocol	The name of the eBusiness protocol that is used to format the messages and related transmission information that you send to or receive from the trading partner; RosettaNet, X12, UN/EDIFACT, or BizTalk. Select UN/EDIFACT . After you save the new outer envelope, you cannot change the protocol.

Table 108 General Outer Envelope Characteristics (Continued)

Field Name	Description
Direction	You must define separate outer envelopes for inbound and outbound messages. This field indicates the direction for the current envelope: Inbound —For messages coming in from a trading partner. Outbound —For messages going out to a trading partner.
Version	The version number of the eBusiness protocol in use; for example, UN/EDIFACT version 3B (version 3, Batch) or 4I (version 4, Interactive). All protocol versions that have been set up in Partner Manager Envelope Setup are available on the drop-down selection list. Note: After you save the new outer envelope, you cannot change the protocol version.
Status	The status of the outer envelope. Only one inbound and one outbound outer envelope can be active for each combination of trading partner, inner envelope type, direction, and version. Note: The e*Xchange back end only processes messages for active profiles. Inactive outer envelopes are not displayed in the left pane of the Partner Manager window if the administrator has selected the Show Only Active TP check box in System Defaults . Choose one of the following values. Active —The outer envelope is currently active, and can be used. Inactive —The outer envelope is not active, and cannot be used. Default: Active . Note: If the status is Inactive and you cannot change it, this means that the setting has been made at the Trading Partner level.
Logical Name	A unique value that you specify for the trading partner. There are several important conditions for the logical name: <ul style="list-style-type: none"> For X12 and UN/EDIFACT, the Logical Name, Version, Sender ID, and Receiver ID for the outbound outer envelope must match the Logical Name, Version, Receiver ID, and Sender ID for the inbound outer envelope. For example, if you are using X12 version 4020, use the same logical name value for the inbound and outbound envelopes for that version. It must be unique for each inbound/outbound envelope set. For example, if you are using UN/EDIFACT versions 3B and 4B, use one value for the 3B inbound and outbound envelope set, and another for the 4B inbound and outbound envelopes. If you have only one outer envelope set per company, you can use the company name. You could also use a numerical value, or any other value as long as it is unique to the inbound/outbound envelope set. For outbound messages, this is the primary value used when e*Xchange receives a message from an internal system to identify the trading partner to which the message is routed. The value in this field must be identical, including case, to the value set the eX_Standard_Event structure's Partner Name node. For more information, refer to the <i>e*Xchange Partner Manager Implementation Guide</i>.
Description	The description of the outer envelope. Default: The eBusiness protocol name, version, and direction, separated by hyphens.
Trading Partner	The name of the trading partner associated with this outer envelope is displayed.

Table 108 General Outer Envelope Characteristics (Continued)

Field Name	Description
Created By	The user ID of the person who saved or updated this outer envelope is displayed.
Created Time	The date and time this outer envelope was saved or updated are automatically displayed when the record is saved.

18.6.2 Entering Outer Envelope Extended Attributes

You must set up certain UN/EDIFACT enveloping values as extended attributes at the outer envelope level.

Predefined extended attributes are preloaded during installation, but can be changed if needed.

To enter outer envelope extended attribute values

Before you begin, complete [“Entering General Outer Envelope Characteristics” on page 333](#).

Note: For information on specific extended attributes provided with e*Xchange Partner Manager, see [“Extended Attributes” on page 394](#).

- 1 On the **New Outer Envelope** dialog box, click the **Extended** tab.

The **Extended** tab appears, as shown in Figure 167.

Figure 167 New Outer Envelope, Extended Tab (UN/EDIFACT)

Attribute Name	Value	Min Size	Max Size	Create
SYNTAX IDENTIFIER	UNOA	4	4	
SYNTAX VERSION	4	1	1	
SERVICE CODE LIST DIRECTORY VERSION NUMBER		1	6	
CHARACTER ENCODING		1	3	
INTERCHANGE SENDER ID		1	35	
SENDER ID CODE QUALIFIER		1	4	
INTERCHANGE SENDER INTERNAL ID		1	35	
INTERCHANGE SENDER INTERNAL SUB-ID		1	35	
INTERCHANGE RECIPIENT ID		1	35	
RECIPIENT ID CODE QUALIFIER		1	4	
INTERCHANGE RECIPIENT INTERNAL ID		1	35	
INTERCHANGE RECIPIENT INTERNAL SUB-ID		1	35	
RECIPIENT REFERENCE PASSWORD		1	14	
RECIPIENT REFERENCE QUAL		2	2	

OK Cancel Apply Help

- 2 Enter the appropriate values for the attributes defined by your administrator. If defaults have been set, these are displayed; however, they can be changed.

For more information on specific attributes, refer to Table 109.

- 3 Continue to [“Entering Transport Component Information” on page 339](#).

18.7 Extended Envelope Attributes for UN/EDIFACT

For UN/EDIFACT, extended attributes are values required by e*Xchange Partner Manager to build interchange, group, and message envelopes as needed for your business.

e*Xchange provides extended attribute templates for many UN/EDIFACT versions. However, you must provide the values yourself. You can specify default values via the **Functions** menu, **System Administration, Partner Manager Envelope Setup**. When setting up the envelopes for each trading partner, you can change the default values if needed.

Before setting up the extended attributes, or any other aspect of the trading partner setup, it is important to have the trading partner agreement for each of your trading partners, and ideally the name, address, and telephone number of the eBusiness integration contact for each trading partner. Having this information immediately available will help ensure smooth and accurate setup.

18.7.1 UN/EDIFACT Extended Attributes—Outer Envelope

The sample attributes listed in Table 109 are those set up as Extended Attributes at the outer envelope level for UN/EDIFACT version 4.

Table 109 Outer Envelope Extended Attributes (UN/EDIFACT Version 4)

Name	Description
SYNTAX IDENTIFIER	The syntax level used: <ul style="list-style-type: none">▪ UNOA for the basic level A▪ UNOB for level B
SYNTAX VERSION	The EDIFACT version used. e*Xchange supports version 3 and 4. For the current version, ISO 9735-1, use 4. Use 3 for the 1988 version amended and reprinted in 1990 plus Amendment 1 of 1992
SERVICE CODE LIST DIRECTORY VERSION NUMBER	Optional: The version number of the service code list directory.

Table 109 Outer Envelope Extended Attributes (UN/EDIFACT Version 4) (Continued)

Name	Description
CHARACTER ENCODING	The identification for the character encoding used in the interchange, as specified in the trading agreement (alphanumeric, up to three characters). Optional. Acceptable values: any three-character code as defined in the trading agreement. If you do not specify a value, e*Xchange assumes the default encoding technique defined for the syntax version being used: 1—ASCII 7-bit code. 2—ASCII 8-bit code. 3—Code page 500 (EBCDIC Multinational No. 5) encoding schema for the repertoire as defined by the code page. 4—Code page 850 (IBM PC Multinational) encoding schema for the repertoire as defined by the code page.
INTERCHANGE SENDER ID	The sender's name or ID code, as specified in the interchange Agreement.
SENDER ID CODE QUALIFIER	The qualifier for the Interchange Sender ID name or code. A qualifier code may refer to an organization identification, as in ISO 6523.
INTERCHANGE SENDER INTERNAL ID	An ID (it could be used to indicate a division, branch or computer system/process) specified by the sender of the interchange. This ID can be used by the recipient in response interchanges, for the purposes of internal routing.
INTERCHANGE SENDER INTERNAL SUB-ID	An optional sub-level of the sender's internal ID (up to 35 characters).
INTERCHANGE RECIPIENT ID	The receiver's name or ID code, as specified in the Interchange Agreement.
RECIPIENT ID CODE QUALIFIER	An optional qualifier referring to the receiver's identification code. Up to 4 characters.
INTERCHANGE RECIPIENT INTERNAL ID	An optional additional internal identification (for example, a division, branch, or computer system or process), specified by the receiver to facilitate internal routing. Up to 35 characters.
INTERCHANGE RECIPIENT INTERNAL SUB-ID	An optional sub-level of the receiver's internal ID. Up to 35 characters.
RECIPIENT REFERENCE PASSWORD	The reference or password required for the sender to access the recipient's system. Up to 14 characters.
RECIPIENT REFERENCE QUAL	An optional qualifier for the recipient's reference or password. Up to 4 characters.
APPLICATION REFERENCE	An optional value identifying the application area assigned by the sender, to which the messages in the interchange relate; for example, the message type, if all the messages in the interchange are of the same type. Whether or not this field is used, and if so the exact nature of the data, is specified in the trading partner Interchange Agreement.

Table 109 Outer Envelope Extended Attributes (UN/EDIFACT Version 4) (Continued)

Name	Description
PROCESSING PRIORITY CODE	Optional: a single-character code determined by the sender requesting processing priority for the interchange. Note: The Interchange Agreement must state whether the field is to be used. If it is used, a list of codes and meanings must be provided.
ACKNOWLEDGMENT REQUEST	An optional code requesting acknowledgment for the interchange. One digit.
INTERCHANGE AGREEMENT ID	An optional name or code indicating the type of agreement under which the interchange takes place. (1–35 characters)
TEST INDICATOR	An optional single-digit numeric code (1, 2, 3, or 4) indicating that this is a test.
SEGMENT TERMINATOR	The symbol used to indicate the end of a segment (delimiter). Default: apostrophe ('). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment.
REPETITION SEPARATOR	The symbol used as a repetition separator (delimiter). Default: asterisk (*). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment.
COMPONENT ELEMENT SEPARATOR	The symbol used as a component data element separator (delimiter). Default: colon (:). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment.
ELEMENT SEPARATOR	The symbol used as a separator between data elements (delimiter). Default: plus sign (+). Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment.
DECIMAL SYMBOL	The symbol used to indicate a decimal point. Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment.
RELEASE CHARACTER	The symbol used as a release character. Default: question mark (?). The release character, immediately preceding one of the other separators, restores its normal meaning. For example, 10?+10=20 means 10+10=20. The question mark is represented by ??. Note: if you specify a value other than the default, e*Xchange includes this information in the message as part of the UNA segment.
INTERCHANGE ENVELOPE CUSTOM VALIDATION	If you have a custom Validation for the interchange envelope layer, type the name.
FUNCTIONAL ENVELOPE CUSTOM VALIDATION	If you have a custom Validation for the functional envelope layer, type the name.
MESSAGE ENVELOPE CUSTOM VALIDATION	If you have a custom Validation for the message envelope (UNH) layer, type the name.

18.7.2 Entering Transport Component Information

You must specify the communications protocol by which outer envelopes will be sent, and provide information required by the protocol.

To add transport component information

- 1 On the **New Outer Envelope** dialog box, click the **Transport Component** tab.
- 2 The **Transport Component** tab appears (see Figure 168).
- 3 Select the communications protocol (for UN/EDIFACT, FTP (Batch), HTTP, and SMTP are valid choices).

The rest of the fields change according to your selection.

- 4 Fill in the appropriate values. For more information, see Table 110.
- 5 Click **Apply**.

If you entered a password, the **Confirm Password** dialog box appears.

- 6 Confirm the password.

Type the password exactly as you typed it in the **Password** field, and then press **Enter**. The password field is case-sensitive; make sure you use the correct capitalization.

Note: Password confirmation is only to avoid errors, not for security purposes. Anyone with access to this dialog box can change the password at any time. You do not need to know the old password to change to a new one.

- 7 Continue to “**Defining Contacts, Notes, Action Items, and User Security**” on page 342.

Note: The Secure Data Transport tab is not currently applicable to UN/EDIFACT.

Figure 168 New Outer Envelope, Transport Component Tab

Table 110 Outer Envelope Transport Component Fields

Field Name	Description
Comm Protocol	<p>The communications protocol used for this outer envelope. For UN/EDIFACT, only FTP (Batch), HTTP, or SMTP are valid choices for e*Xchange Client for Windows. If you are using the Web interface, HTTPS is also available.</p> <p>FTP (Batch)—Messages are transmitted using File Transfer Protocol.</p> <p>Note: If you want the files to be stored on the local machine, supply the File Name but leave the User Name, Password, Host, and Port fields empty.</p> <p>HTTP—Messages are transmitted with HTTP.</p> <p>HTTPS—Messages are transmitted using HTTP with SSL (available only via the Web interface).</p> <p>SMTP—Messages are transmitted using the Simple Mail Transfer Protocol.</p>

Table 110 Outer Envelope Transport Component Fields (Continued)

Field Name	Description
File Name (FTP)	<p>For inbound—type the complete file name, including path and extension, of the file from which inbound outer envelopes based on this profile are read, or to which outbound outer envelopes are written. You can use wild cards in the filename or at the beginning of the extension but not at the end; for example, use *.dat or *.at but not *.da*.</p> <p>For outbound—type the complete file name, including path and extension, using variables as needed. %d adds a two-digit day (for example, 05 for the fifth day of the month) to the file name, and %n adds a sequential number (for example, 01, 02, and so forth); for example, TP01%d_%n.dat.</p> <p>Windows: If the FTP server is set up on a Windows machine, the path must be relative to the FTP server default directory. For example, if the FTP server default directory is c:\eGate and your full path for inbound messages is c:\eGate\EDF\input*.in, type only \EDF\input.*in.</p> <p>UNIX: If the FTP server is set up on a UNIX machine, use forward slashes. For example, your full path for outbound messages might be /home/eGate/EFT/output/1400_EDF48_%d_%n.dat.</p>
URL (HTTP)	<p>If comm protocol is HTTP, enter the full URL, including prefix. For example:</p> <ul style="list-style-type: none"> http://www.WebAddress.com
(Outbound only) User Name (FTP, HTTP)	<p>The user name to be used to access the host on which messages are stored. If the comm protocol is FTP (Batch), this field is required for successful transfer of files to and from the FTP server.</p> <p>Note: If you want to store the files on the local machine, leave this field empty.</p>
(Outbound only) Password (FTP, HTTP)	<p>The password to be used to access the host used for storage and retrieval of messages.</p> <p>If comm protocol is FTP (Batch)—this field is required for successful transfer of files to or from the host. If files are stored locally, leave this field empty. When you have entered all the information, click Apply or OK to save the data. A Confirm Password dialog box appears. The password you enter in this dialog box must match the one entered in the Password field before the data is accepted. This helps prevent errors in entering a password.</p>
Host (FTP)	<p>The name of the host on which messages are stored. For inbound messages, this is the source of the messages; for outbound messages, it is the destination.</p> <p>If comm protocol is FTP (Batch)—this field is required for successful transfer of files to or from the host. If files are stored locally, leave this field empty.</p>
Port (FTP)	<p>If desired, you can specify the port to be used to access the host. Leave this field blank to use the default port.</p>
Sender e-Mail Address (SMTP)	<p>The e-mail address of the message sender.</p>
Receiver e-Mail (SMTP)	<p>The e-mail address of the message recipient.</p>
(Outbound only) MailHost/IP Address (SMTP)	<p>The host name of the mail server.</p>

Table 110 Outer Envelope Transport Component Fields (Continued)

Field Name	Description
(Outbound only) MailHost Port (SMTP)	The port for the mail server.

Note: The Secure Data Transport tab is not currently applicable to UN/EDIFACT.

18.7.3 Defining Contacts, Notes, Action Items, and User Security

As part of setting up each component, you have the option to set up the following additional information:

- On the **Contacts** tab—contact information
- On the **Comments** tab—notes and action items
- On the **Security** tab—user access (already inherited from the parent component level, but can be customized for the current outer envelope).

None of this setup is required to save the new outer envelope or to process messages to and from the trading partner. However, each of these tabs provides you with additional capabilities.

Detailed instructions on using each of these tabs is provided in additional chapters, as follows:

Contacts tab—[“Storing Contact Information” on page 210](#)

Comments tab—[“Tracking Notes and Action Items” on page 216](#)

Security tab—[“Assigning Access Privileges to Trading Partner Profiles” on page 225](#)

For information on using these tabs, refer to the appropriate chapter or to the online Help system.

18.8 Entering Inner Envelope Properties

Once you have set up outer envelopes, you can define the specific messages that you will be sending and receiving. These are set up at the inner envelope level.

You must set up a separate inner envelope for each type of message that will be sent to the trading partner and each type of message that will be received from the trading partner.

The following steps include all the activities needed to add a new inner envelope. You can perform these steps only if you have the appropriate access rights.

- 1 Enter general inner envelope characteristics: see [“Entering General Inner Envelope Characteristics” on page 343](#)
- 2 Enter inner envelope characteristics that are unique to the eBusiness protocol: see [“Entering Inner Envelope Attribute Values” on page 347](#)

- 3 Optional: define contacts, notes and action items, and security for the inner envelope see [“Defining Contacts, Notes, Action Items, and User Security” on page 350](#)
- 4 When you have set up all inner envelopes, go back and enter information about the return inner envelopes that will be expected in response to each inner envelope: see [“Entering Return Inner Envelope Information” on page 352](#). It is important to set up all envelopes before completing this step; if you do not, the return envelopes will not be available for selection.

When you have finished setting up the inner envelopes, trading partner setup is complete.

18.8.1 Obtaining Information About Each Inner Envelope

Before you begin to add a new inner envelope to e*Xchange Partner Manager, you need to obtain the following information about each inner envelope required:


- Inner envelope characteristics (general and extended attributes)
- Information about people you may need to contact regarding the inner envelope
- Supplemental information about each inner envelope
- Action items related to each inner envelope that you want to assign to yourself or to other e*Xchange Partner Manager users
- The names of users and user groups who should have access to this inner envelope and the type of access they require (view, edit, full control, or read-only).

18.8.2 Entering General Inner Envelope Characteristics

To identify the structure and content of the inner envelope so that it can be correctly processed by e*Xchange Partner Manager, you must enter general information such as the protocol version and transfer mode.

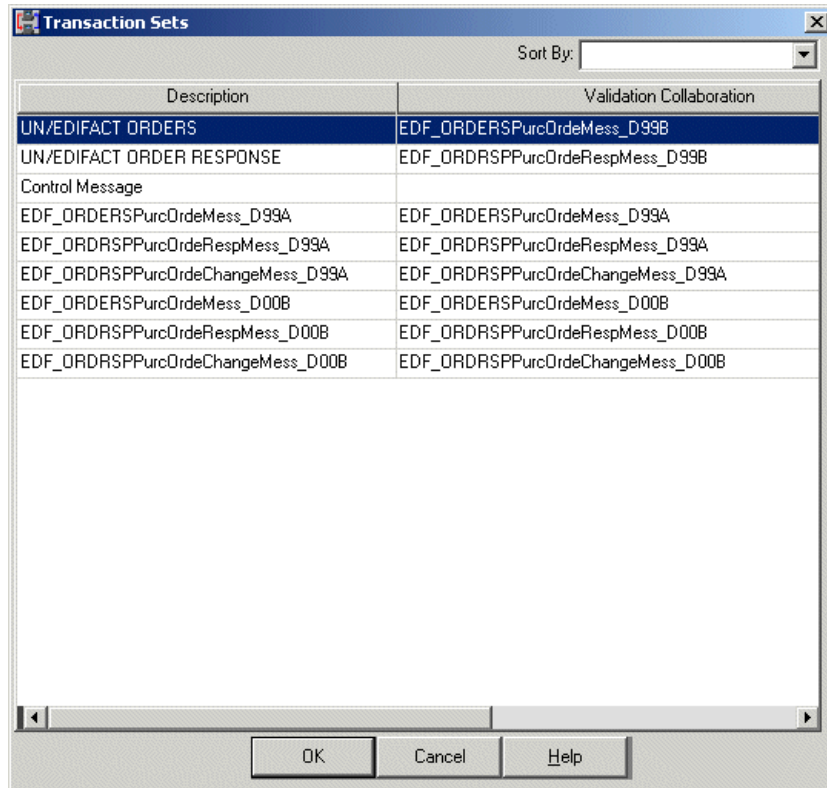
Note: First, set up all the eBusiness messages that you will be using for this trading partner, both inbound and outbound, without setting up return messages. When you have done this, go back to each inner envelope and select the appropriate messages that would be expected responses.

To enter general inner envelope characteristics

- 1 In the left pane of the Partner Manager window, select the appropriate outer envelope (inbound or outbound).
 - 2 Click **New Inner Envelope** .
- The **New Inner Envelope** dialog box appears (see Figure 170).
- 3 In the **Version** field, choose the eBusiness protocol that the trading partner is using. One of two things occurs, according to whether you have inner envelope definitions set up for this version in the **Inner Envelope Definition Setup** dialog box:

- ♦ If you have transactions set up, the **Transaction Sets** dialog box appears (see Figure 169). Choose an inner envelope definition, and then click **OK** to return to the **General** tab of the **New Inner Envelope** dialog box. The **Description** and **Validation Collaboration** fields are filled in based on your selection.

Figure 169 Transaction Sets (UN/EDIFACT)



- ♦ If you do not have definitions set up, enter the values for **Validation Collaboration** and **Description**. For more information, refer to Table 111.
- 4 Enter the **Transfer Mode** for this message: Batch, Fast Batch, or Interactive. For more information, refer to Table 111.
 - 5 Continue to [“Entering Inner Envelope Attribute Values” on page 347](#).

Figure 170 New Inner Envelope, General Tab

The screenshot shows the 'New Inner Envelope' dialog box with the 'General' tab selected. The fields are as follows:

- Version:** 4B (with a search icon)
- Transfer Mode:** (empty dropdown)
- Alt ID:** (empty text field)
- Status:** Active (dropdown)
- Message Compress:** ☐
- Validation Collaboration:** EDF_ORDRSPProcOrderRespMess_D99B
- Description:** UN/EDIFACT ORDER RESPONSE
- Outer Envelope:** EDF-4B-Inbound
- Created By:** (empty text field)
- Created Time:** (empty text field)

Buttons at the bottom: OK, Cancel, Apply, Help.

Table 111 General Inner Envelope Characteristics

Field Name	Description
Version	<p>The version number of the eBusiness protocol in use; for example, UN/EDIFACT version 3B (version 3 for Batch messages) or 4I (version 4 for Interactive messages).</p> <p>Once you select from the Transaction Sets dialog box (if you have transactions already set up), the Version, Status, Validation Collaboration, Description, and Outer Envelope fields are filled in for you. An icon next to the Version field allows you to reselect from the Transaction Sets dialog box if needed.</p>

Table 111 General Inner Envelope Characteristics (Continued)

Field Name	Description
Transfer Mode	<p>The way in which the eBusiness messages are transmitted to, or received from, the trading partner. The following choices are valid for UN/EDIFACT:</p> <p>Batch—Inner envelopes of all types are accumulated and sent to the trading partner as a group at a preset time or at preset intervals. A batch includes multiple transactions, accumulated up to the preset send time, and can have multiple functional groups. Messages of different types can be batched in the same functional group if they have the same functional group ID code, sender ID code, receiver ID code, and functional group version number.</p> <p>Fast Batch—Inner envelopes of a certain type are accumulated and sent to the trading partner as a group of messages, all of the same transaction type, at a preset point. Messages can be batched in the same functional group if they have the same functional group ID code, sender ID code, receiver ID code, and functional group version number. The point at which a fast batch is sent is determined by the setting in the Standard Event Structure for the inner envelope. For more information, refer to “Fast Batch Settings” on page 331. Transactions grouped within the fast batch must have the same functional ID code, sender ID code, receiver ID code, and functional group version number, and also the same interchange ID.</p> <p>Interactive—Inner envelopes are created and sent to the trading partner individually in real time. This mode facilitates “question and answer” types of inner envelopes.</p>
ALT ID	An alternate identification number for this kind of inner envelope. (Not currently used.)
Status	<p>The status of the inner envelope: Active or Inactive. The e*Xchange Partner Manager back end does not process messages that are inactive. Inactive inner envelopes are not displayed in the left pane of the Partner Manager window if the administrator has selected the Show Only Active TP check box in System Defaults.</p> <p>Note: If the status is Inactive and you cannot change it, this means that the setting has been made at the Trading Partner or Outer Envelope level.</p>
Message Compress	<p>Indicates whether the messages should be compressed before they are stored in the database. Default: cleared (inner envelopes are not compressed).</p> <p>Note: If you select this option, the messages are not viewable in the Message Tracking window.</p>
Validation Collaboration	<p>The name of the Collaboration that verifies and translates inner envelopes of this type.</p> <p>When you select from the Transaction Sets dialog box (Transfer Mode field), the validation Collaboration is filled in, but you can modify or delete it. For outbound messages, you might choose not to run validation on the message if you are sure outgoing messages are correct.</p>

Table 111 General Inner Envelope Characteristics (Continued)

Field Name	Description
Description	The identification number and name of the inner envelope you are defining. When you select from the Transaction Sets dialog box (Transfer Mode field), the description is filled in for you.
Outer Envelope	The name of the outer envelope associated with this inner envelope is displayed.
Created By	The user ID of the person who created or updated this outer envelope is displayed.
Created Time	The date and time this outer envelope was saved or updated are automatically displayed when the record is saved.

18.8.3 Entering Inner Envelope Attribute Values

To record inner envelope characteristics specific to the message standard being used, you must add this information to e*Xchange Partner Manager as a set of extended attributes.

To enter inner envelope extended attribute values

Before you begin, complete [“Entering General Inner Envelope Characteristics” on page 343](#).

- 1 On the **New Inner Envelope** dialog box, click the **Extended** tab.

Figure 171 New Inner Envelope, Extended Tab (UN/EDIFACT)

Attribute Name	Value	Min Size	Max Size
APPLICATION SENDER ID CODE		1	35
APPLICATION SENDER QUAL		1	4
APPLICATION RECEIVER ID CODE		1	35
APPLICATION RECEIVER QUAL		1	4
APPLICATION PASSWORD		1	14
INCLUDE FUNCTIONAL GROUP	Y	1	1
MESSAGE TYPE IDENTIFIER	ORDERS	1	6
MESSAGE TYPE VERSION	D	1	3
MESSAGE TYPE RELEASE NUMBER	00A	1	3
CONTROLLING AGENCY	UN	1	2
ASSOCIATION ASSIGNED CODE		1	6
CODE LIST DIRECTORY VERSION NUMBER		1	6
MESSAGE TYPE SUB-FUNCTION IDENTIFICATION		1	6
COMMON ACCESS REFERENCE		1	35

- 2 Enter the appropriate attribute values, as required by your business.

Note: For information on specific extended attributes, see Table 112.

- 3 Continue to [“Entering Return Inner Envelope Information” on page 352](#).

18.8.4 UN/EDIFACT Extended Attributes—Inner Envelope

The sample attributes listed in Table 112 are those provided for UN/EDIFACT version 4B. They are set up as Extended Attributes at the inner envelope level.

There are two choices in terms of how you determine when batches are sent out:

- Batch Time—sets a specific time or times when batches are sent.
- Repeat Time/Repeat Granularity—sets a specific time interval; for example, 8 hours.

If you set values for Batch Repeat Time/Batch Repeat Granularity and also Batch Time, e*Xchange uses the value in the **Batch Time** field to determine when batches are sent out.

Table 112 Inner Envelope Extended Attributes (UN/EDIFACT, Version 4 Batch)

Name	Description
APPLICATION SENDER ID CODE	Required: An additional ID code (for example, of a division, branch, or computer system or process), specified by the sender to facilitate internal routing. Up to 35 characters.
APPLICATION SENDER QUAL	An optional qualifier to the sender's ID code (4 characters).
APPLICATION RECEIVER ID CODE	Required: An additional ID code (for example, of a division, branch, or computer system or process), specified by the recipient to facilitate internal routing. Up to 35 characters.
APPLICATION RECEIVER QUAL	Optional: A qualifier to the recipient's ID code (4 characters).
APPLICATION PASSWORD	Optional: The reference or password required for the sender to access the recipient's division, department or sectional application system/process (additional to the recipient's reference password at the interchange level, which is required). Up to 14 characters.
INCLUDE FUNCTIONAL GROUP	Only applicable to outbound messages sent by Interactive transfer mode. This field indicates whether the trading partner requires group information (UNG/UNE segments) in the message.
MESSAGE TYPE IDENTIFIER	Required: Message Type: A code identifying a type of message and assigned by its controlling agency. Up to 6 characters.
MESSAGE TYPE VERSION	Required: The version number for the message type. Up to 3 characters.
MESSAGE TYPE RELEASE NUMBER	Required: The release number within the current message version number (up to 3 characters)

Table 112 Inner Envelope Extended Attributes (UN/EDIFACT, Version 4 Batch) (Continued)

Name	Description
CONTROLLING AGENCY	Required: the controlling agency. For UN/EDIFACT, this value is always UN.
ASSOCIATION ASSIGNED CODE	Optional: a code that further identifies the message. Assigned by the association responsible for the design and maintenance of the message type concerned. Up to 6 characters.
CODE LIST DIRECTORY VERSION NUMBER	Optional: The version number of the service code list directory. Up to 6 characters.
MESSAGE TYPE SUB-FUNCTION IDENTIFICATION	Optional: A Code identifying a sub-function of a message type. Up to 6 characters.
COMMON ACCESS REFERENCE	Optional: A reference serving as a key to relate all subsequent transfers of data to the same business case or file. Up to 35 characters.
MESSAGE TRANSFER INDICATOR	Optional: First and Last Transfer: An indication used for the first and last message in a sequence of messages related to the same topic. One character.
MESSAGE SUBSET IDENTIFICATION	Optional: a coded identification of a message subset, assigned by its controlling agency. Up to 14 characters.
MESSAGE SUBSET VERSION NUMBER	Optional: Version number of the message subset. Up to 3 characters.
MESSAGE SUBSET RELEASE NUMBER	Optional: the release number within the message subset version number. Up to 3 characters.
MESSAGE SUBSET CONTROLLING AGENCY	Optional: the controlling agency for the message subset. For UN/EDIFACT, this value is always UN. Up to 3 characters. Optional: the controlling agency.
MESSAGE IMPLEMENTATION GUIDELINE IDENTIFICATION	Optional: A code identifying the message implementation guideline, assigned by the controlling agency.
MESSAGE IMPLEMENTATION GUIDELINE VERSION NUMBER	Optional: The version number of the message implementation guideline.
MESSAGE IMPLEMENTATION GUIDELINE RELEASE NUMBER	Optional: The release number within the message implementation guideline version number.
MESSAGE IMPLEMENTATION GUIDELINE CONTROLLING AGENCY	Optional: the controlling agency for the implementation guideline. For UN/EDIFACT, this value is always UN.
SCENARIO IDENTIFICATION	Optional: Code identifying scenario. Up to 14 characters.
SCENARIO VERSION NUMBER	Optional: Version number of the scenario. Up to 3 characters.

Table 112 Inner Envelope Extended Attributes (UN/EDIFACT, Version 4 Batch) (Continued)

Name	Description
SCENARIO RELEASE NUMBER	Optional: the release number within the scenario version number. Up to 3 characters.
SCENARIO CONTROLLING AGENCY	Optional: the controlling agency for the scenario. For UN/EDIFACT, this value is always UN.
BATCH TIME[hh:mm:ss]	<p>To send batches at a preset daily time, enter the time in the format hh:mm:ss (military time); for example, 09:00:00 for 9am or 15:30:00 for 3pm. If the batch is being set at a preset daily time, you do not need to set any other attributes.</p> <p>You can also set multiple batch times, using the pipe symbol as the delimiter (up to 50 characters). For example, 09:00:00 17:30:00 24:00:00 sends out batches at 9am, 5:30pm, and midnight. The values must be in ordered sequence, from the earliest times to the latest.</p> <p>Note: If you set values for Batch Repeat Time/Batch Repeat Granularity and also Batch Time, the Batch Time setting takes precedence.</p>
BATCH REPEAT TIME/ BATCH REPEAT GRANULARITY	<p>To send batches at regular intervals, use these two attributes. BATCH REPEAT TIME sets the numerical value, and BATCH REPEAT GRANULARITY sets the time period: H for hours, MI for minutes, and D for days. For example, BATCH REPEAT TIME of 4 and BATCH REPEAT GRANULARITY of H means that batches will be sent out every four hours; values of 30 and MI mean that batches will be sent out every 30 minutes.</p> <p>Note: If you want to send batches at a preset daily time, do not set values for these attributes. Use BATCH TIME.</p> <p>If you set a value in the BATCH TIME field, e*Xchange uses that value rather than Repeat Time/Repeat Granularity.</p> <p>Note: If you use these fields to control batching, you can have a maximum of 10 Batch e*Ways running. This is because the display-only Repeat Batch Last Check Time field has a maximum of 255 characters.</p>
MESSAGE CLASSIFICATION TYPE	<p>A flag to specify the message type for the message: B for batch, I for interactive.</p> <p>Certain types of UN/EDIFACT messages are not batched.</p> <p>Note: For Version 4B, do not change this value.</p>

18.8.5 Defining Contacts, Notes, Action Items, and User Security

As part of setting up each component, you have the option to set up the following additional information:

- On the **Contacts** tab—contact information
 - On the **Comments** tab—notes and action items
 - On the **Security** tab—user access (already inherited from the parent component level, but can be customized for the current outer envelope).
- 4 None of this setup is required to save the new outer envelope or to process messages to and from the trading partner. However, each of these tabs provides you with additional capabilities.

Detailed instructions on using each of these tabs is provided in additional chapters, as follows:

Contacts tab—[“Storing Contact Information” on page 210](#)

Comments tab—[“Tracking Notes and Action Items” on page 216](#)

Security tab—[“Assigning Access Privileges to Trading Partner Profiles” on page 225](#)

For information on using these tabs, refer to the appropriate chapter or to the online Help system.

When you have set up everything except Return Inner Envelope information for all your inner envelopes, continue to [“Entering Return Inner Envelope Information” on page 352](#).

18.9 Return Inner Envelopes

Once you have set up inner envelopes for all your inbound and outbound transactions, you are ready to specify which transactions will be expected in response.

18.9.1 About Return Inner Envelopes

The e*Xchange Partner Manager allows you to specify one or more return inner envelopes that will be valid for a specific incoming or outgoing inner envelope. However, some setup is required before the correct selections are available on the **Return Inner Envelope** tab. You must create all inner envelopes for the trading partner, both inbound and outbound, so that the correct selections will be available to you.

For example, suppose you are using UN/EDIFACT and have a trading partner, ABC Company. You will send only transaction **ORDERS, Purchase Order Message**, to this trading partner. In response you might receive a control message, later receive a response to the purchase order message, and finally send an acknowledgment of the response. Return inner setup for the outbound part of this scenario is illustrated in [“New Inner Envelope, Return Inner Envelope Tab” on page 352](#). For a diagram of the messaging scenario, refer to [“Purchase Order Message and Response: UN/EDIFACT” on page 393](#).

To set this up you must do the following:

- In **Inner Envelope Definition Setup**, for the specific UN/EDIFACT version, define the following messages:
 - ♦ **ORDERS**, Purchase Order Message
 - ♦ **ORDRSP**, Purchase Order Response Message
 - ♦ **CONTRL**, Control Message.
- Define inbound inner envelopes for the Purchase Order Message and the Control Message.
- Define outbound inner envelopes for the Purchase Order Response Message and the Control Message.

- For the inbound Purchase Order Message, on the Return Inner Envelope tab, select both the Purchase Order Response Message and the Control Message.
- For the outbound Purchase Order Response Message, select the Control Message.

Because you defined all the envelopes first, the appropriate return messages are available for selection on the **Return Inner Envelope** tab.

18.9.2 Entering Return Inner Envelope Information

You must specify the inner envelope or envelopes that will be expected in response to the current inner envelope. You can select more than one return inner envelope.

Note: *If the appropriate return inner envelopes are not available for selection, some additional setup is required. Refer to “[About Return Inner Envelopes](#)” on page 351.*

To enter return inner envelope information

Before you begin, complete “[Entering Inner Envelope Attribute Values](#)” on page 347.

- 1 On the **Inner Envelope** dialog box, click the **Return Inner Envelope** tab.

Figure 172 New Inner Envelope, Return Inner Envelope Tab

Version	Description	Include	Response Time	Period	# of Retries
4B	EDF_ORDRSPPurcOrdeRespMess_D99B	<input checked="" type="checkbox"/>	1	Day(s)	0
4B	EDF_CONTROL	<input checked="" type="checkbox"/>	2	Minute(s)	0

All eBusiness messages that have already been defined for this trading partner, for the opposite direction, are listed. It is up to you to know which eBusiness messages are the correct responses for the current eBusiness implementation. This should be defined in the trading partner agreement.

- 2 For each listed message type that might be returned by the trading partner (for outbound messages), or for each message type that you might return to the trading partner (for inbound messages), do the following:
 - ♦ Check the **Include** check box.
 - ♦ Set the response time and period that will be acceptable for receiving the return envelope; for example, a response time of 24 and period of hours means that a return inner envelope should be received within 24 hours. If the return envelope is not received within the preset time period, the message is resent for the preset number of times (as set in the **# of Retries** field).
 - ♦ Set the number of times the inner envelope should be resent if a response is not received before the envelope is recorded as a failed message. For example, if the message should be sent once and then retried once if the return inner envelope is not received, the retry setting would be 1.
- 3 Continue to **“Defining Contacts, Notes, Action Items, and User Security” on page 350**.

Message Tracking

e*Exchange Client for Windows includes a feature that allows you to view any messages that have been processed, including any errors that might be associated with a message. This useful tool enables you to pinpoint the source of an error so that it can be resolved.

You can use the various search fields to narrow down your search before viewing message details. For example, you might want to view all inbound messages from a specific trading partner during a certain date range, or all outbound messages for the day that used the X12 protocol.

For any message, you can view an error list, extended attributes, or the actual message text.

This tool is very useful for troubleshooting message errors and monitoring message flow.

Searching for messages is a three-step process:

- 1 On the **General** tab, enter general search criteria, and then click the **Search** tab to view a list of envelope profiles that meet the criteria.
- 2 On the **Search** tab, view the list, enter advanced search criteria if needed, highlight the desired envelope profiles, and then click the **Details** tab to view a list of messages that meet the criteria.
- 3 On the **Details** tab, view the message information as needed.

This section includes the following step-by-step instructions:

- Specifying a range of trading partner profiles: see [“To specify envelope profiles” on page 355](#)
- Viewing the list of envelope profiles: see [“To view the message list” on page 356](#)
- Viewing message details: see [“To view message details” on page 359](#)
- Specifying sort columns: see [“To specify sort columns” on page 361](#)
- Viewing message errors: see [“To view message errors” on page 366](#)

19.1 Searching for Messages

You can specify search criteria to define a range of envelope profiles; for example, inbound messages of a specific type for a specific trading partner. This creates a list of


envelope profiles. You can then specify additional criteria, if needed, and create the message list.

To specify envelope profiles

- 1 On the **Functions** menu, click **Message Tracking**.

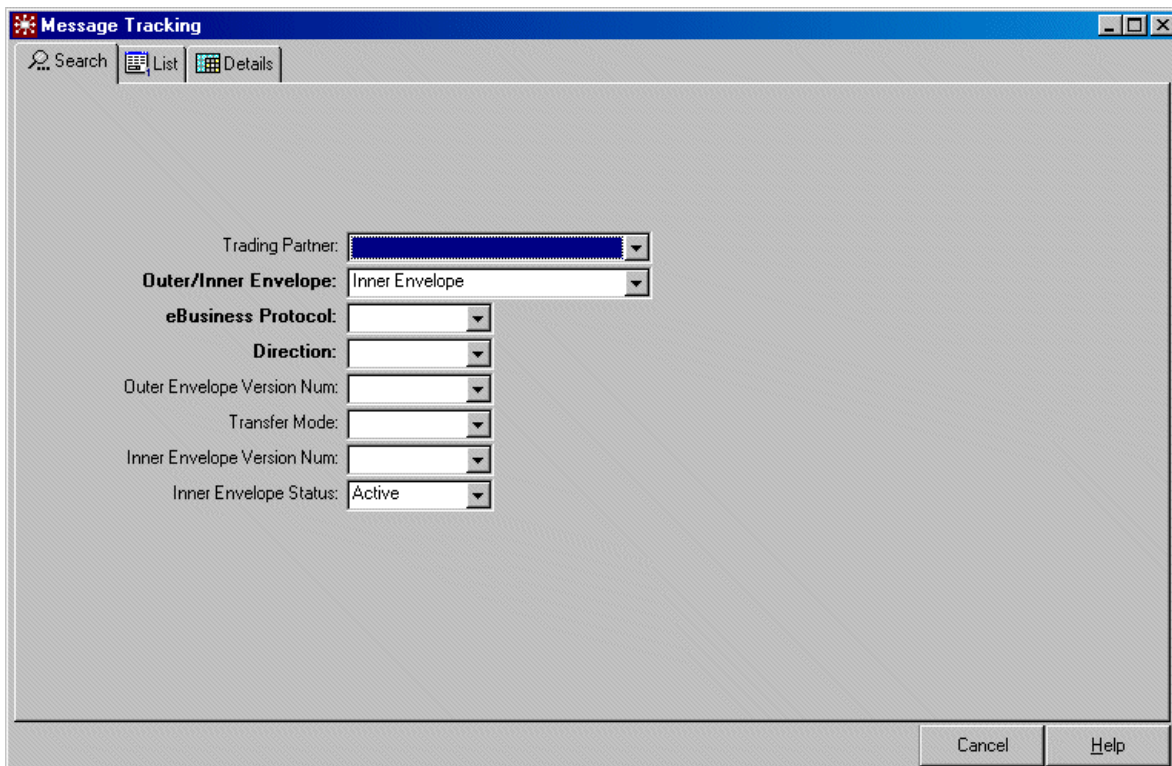
The **Message Tracking** dialog box appears (see Figure 173).

- 2 On the **Search** tab, specify the appropriate search criteria. For more information on the search fields, see Table 113.

If you make selections and then change your mind, click **Clear**  to start over (only the optional information is cleared).

- 3 Click the **List** tab. One of the following occurs:
 - ♦ If no envelope profiles match your search criteria, the system displays the following message: **No records found based on search criteria**. Click **OK**, enter different search criteria, and then click the **List** tab again.
 - ♦ If envelope profiles are found, the **List** tab appears, with the list of profiles (see [Figure 174 on page 357](#)).
- 4 Continue to [“To view the message list” on page 356](#).

Figure 173 Message Tracking, Search Tab



The screenshot shows the "Message Tracking" dialog box with the "Search" tab selected. The dialog contains the following fields and controls:

- Trading Partner:** A dropdown menu.
- Outer/Inner Envelope:** A dropdown menu with "Inner Envelope" selected.
- eBusiness Protocol:** A dropdown menu.
- Direction:** A dropdown menu.
- Outer Envelope Version Num:** A dropdown menu.
- Transfer Mode:** A dropdown menu.
- Inner Envelope Version Num:** A dropdown menu.
- Inner Envelope Status:** A dropdown menu with "Active" selected.
- Buttons:** "Cancel" and "Help" buttons at the bottom right.

Table 113 Message Tracking Search Fields

Field Name	Description
Trading Partner	To limit the list to envelope profiles for a specific trading partner, select the trading partner from the drop-down list. If you leave this field empty, all envelope profiles that match the other search criteria are included in the list.
Outer/Inner Envelope	You must specify the type of envelope profile: Outer Envelope or Inner Envelope .
eBusiness Protocol	You must choose a message standard for the inner envelope: BizTalk, RosettaNet, UN/EDIFACT, or X12. Only messages that use the specified standard are included in the list.
Direction	You must specify the direction of messages to be included in the list: Inbound or Outbound .
Outer Envelope Version Num	You can limit the list to messages using a specific version of the selected message standard for the outer envelope; for example, X12 version 4040, RosettaNet version 1.1, or UN/EDIFACT version 4B.
Transfer Mode	If you selected Inner Envelope in the Outer/Inner Envelope field, you can limit the list to messages using a specific transfer mode: either Batch , Fast Batch , or Interactive . If you selected Outer Envelope , this field is not available.
Inner Envelope Version Num	If you selected Inner Envelope in the Outer/Inner Envelope field, you can limit the list to messages using a specific version of the selected message standard for the inner envelope; for example, X12 version 4040, RosettaNet version 1.1, or UN/EDIFACT version 4B. If you selected Outer Envelope , this field is not available.
Inner Envelope Status/Outer Envelope Status	You can specify a status for envelopes to be included on the list: Active or Inactive (Active is the default).

19.2 Using the Message Tracking List

The Message Tracking List is a list of envelope profiles that match the criteria you specified on the **Search** tab, and is a good starting point for tracking down errors. You can use the advanced search criteria to tailor the information that is included in the list, and also the sequence in which the information is displayed. Click the **Details** tab to view the results.

To view the message list

Before you begin, complete [“To specify envelope profiles” on page 355](#).

- 1 Select the **List** tab of the **Message Tracking** dialog box (see Figure 175).

For information on the specific columns that comprise the **Message Tracking** list, refer to [“Message Tracking List Columns” on page 363](#).

- 2 Change sort sequence.

To sort the messages in a different sequence, click **Sort By**, and then specify a new sort field.

3 Set advanced search criteria.

To further define your search before viewing message information in the **Details** tab, specify additional search criteria in the **Advanced Search** box. For more information on advanced search criteria, see [“Message Tracking List Fields: Advanced Search Criteria” on page 358](#).

4 Create the message list.

To view the actual messages, highlight an envelope profile or a range of envelope profiles, and then click the **Details** tab.

5 Conditional: amend search criteria if there are too many messages.

If the list of messages exceeds the number preset in **System Defaults**, e*Xchange displays a message telling you how many messages there are and asking if you want to continue. If the message list is extremely large, change the search criteria to define a smaller message list.

6 Continue to [“To view message details” on page 359](#).

Figure 174 Message Tracking, List Tab (Outbound)

Trading Partner	Outer Envelope	Inner Envelope	Version	Sender ID	Receiver ID
Arcadia Facility	X12-4010-Inbound	X12_271 Hipaa	004010X098	900	200
		X12_271 Hipaa	004010X098	100	200
Evergreen Taiwan	X12-4032-Inbound	test icon	004032X001	1	1
		test icon	004032X000	1	2
XSU	X12-4010-Inbound	X12_270EligibCoverageBenefitInquiry_0040	004010X098	8184457000	6264716000
	X12-4030-Inbound	X12_270EligCoveOrBenelInqu_4030	004030X099	8184457000	6264716000
X12_USA	X12-4010-Inbound	X12_271 Hipaa	004010X092	8184457000	6264716000
		X12_997	004010X092	8184457000	6264716000
Evergreen USA	X12-4010-Inbound	X12_270 Eligibility, Coverage or Benefit Inqui	004010X098	SC12345	RC12345
		X12_997 Functional Acknowledgment	004010X098	ABC123	ABC456

Advanced Search

Unique ID: Response Required:

Original Msg ID: Ack Msg ID: Error Data:

Ack Queue Time: 00/00/0000 00:00:00

Msg Rcpt Time: 00/00/0000 00:00:00

Cancel Help

Table 114 Message Tracking List Fields

Field Name	Description
Invert Select button	Reverses any selections you have made in the list. If you have not selected any envelope profiles, it selects all. If you have selected two, it de-selects those two and selects the rest. This is useful for selecting a range of envelope profiles in the list for which you want to view messages. For example, if you want to view the messages for all but three envelope profiles, select those three, and then click the Invert Select button.
Sort By	Sorts the list in several ways. There are at least four sort options for all messages: <ul style="list-style-type: none"> Trading Partner Outer Envelope Inner Envelope <p>There are several additional sort options for Inner Envelope messages:</p> <ul style="list-style-type: none"> Version Sender ID Receiver ID Transfer Mode Status
List of envelope profiles	All envelope profiles that meet the specified search criteria are included in the list. For each envelope profile, many fields of information are included. If the visible fields do not offer the information you need, use the horizontal scroll bar.

Table 115 Message Tracking List Fields: Advanced Search Criteria

Field Name	Description
Advanced Search	The advanced search feature allows you to narrow the list to messages that meet more specific criteria, as shown below. When you have entered advanced search criteria, click the Details tab to view the messages that meet the criteria.
Unique ID (use * for wild card)	To search for a specific message, type the unique message ID. To include a range of unique IDs, you can use an asterisk as a wild card. For example, 100* includes 1000, 1001, 1002, 1003, and so forth.
Response Required	To search for a message for which a response is required, or for which a response is not required, choose Yes or No from the drop-down list.
Original Msg ID	To search for a specific original message ID code, type it in this field (only responses have an original message ID).
Ack Msg ID	To search for a specific acknowledgment message, type the ID code in this field (only messages for which an acknowledgment has already been sent have an ack message ID).
Error Data	To search for a message that has error data, or that does not have error data, choose Yes or No from the drop-down list.

Table 115 Message Tracking List Fields: Advanced Search Criteria (Continued)

Field Name	Description
Ack Time or Ack Queue Time	To limit the list to messages with a specific acknowledgment time (for outbound) or queue time (for inbound), select from the drop-down list and then add the time information in the columns to the right: for example, if you select Between you must specify beginning and ending times. Times are entered in the format MM/DD/YYYY HH:MM:SS.
Msg Send Time or Msg Rcpt Time	To limit the list to messages with a specific message send time (for outbound) or message receipt time (for inbound), select from the drop-down list and then add the time information in the columns to the right: for example, if you select Greater Than you must specify a starting time. Messages sent after that time are included in the list. Times are entered in the format MM/DD/YYYY HH:MM:SS.
Last Send Time (outbound only)	To limit the list to messages sent at a specific time, select from the drop-down list and then add the time information in the columns to the right: for example, if you select “Less than or equal” you must specify a time. Messages sent up to and including that time are included in the list. Times are entered in the format MM/DD/YYYY HH:MM:SS.

19.3 Viewing the Message Details

The Message Tracking Details tab provides a list of messages for the profiles you selected on the **List** tab, taking into account advanced search criteria if any were set.

To view message details

Before you begin, complete [“To view the message list” on page 356](#).

- 1 View the information on the **Details** tab of the **Message Tracking** dialog box (see Figure 175). For more information, see Table 116.
For information on the specific columns that comprise the **Message Tracking Details** list, refer to [“Message Tracking Details Columns” on page 363](#).
- 2 If the list includes current messages, set the refresh rate so that the list will update itself with new messages.
- 3 To sort the messages in a different sequence, click **Sort By**, and then select a new sort criterion.
- 4 If necessary, change the sort columns by clicking **Sort By** and then choosing **Specify Sort Columns** to access the **Specify Sort Columns** dialog box (see [“Specifying Sort Columns” on page 361](#)).
- 5 If necessary, adjust the viewing window. To split the window vertically, select the vertical black bar to the left of the horizontal scroll bar and move it to the right (see [“Splitting the Message Tracking Details Window” on page 361](#)).
- 6 Continue to [“Viewing Message Errors” on page 366](#).

Figure 175 Message Tracking Dialog, Details Tab (Outbound)

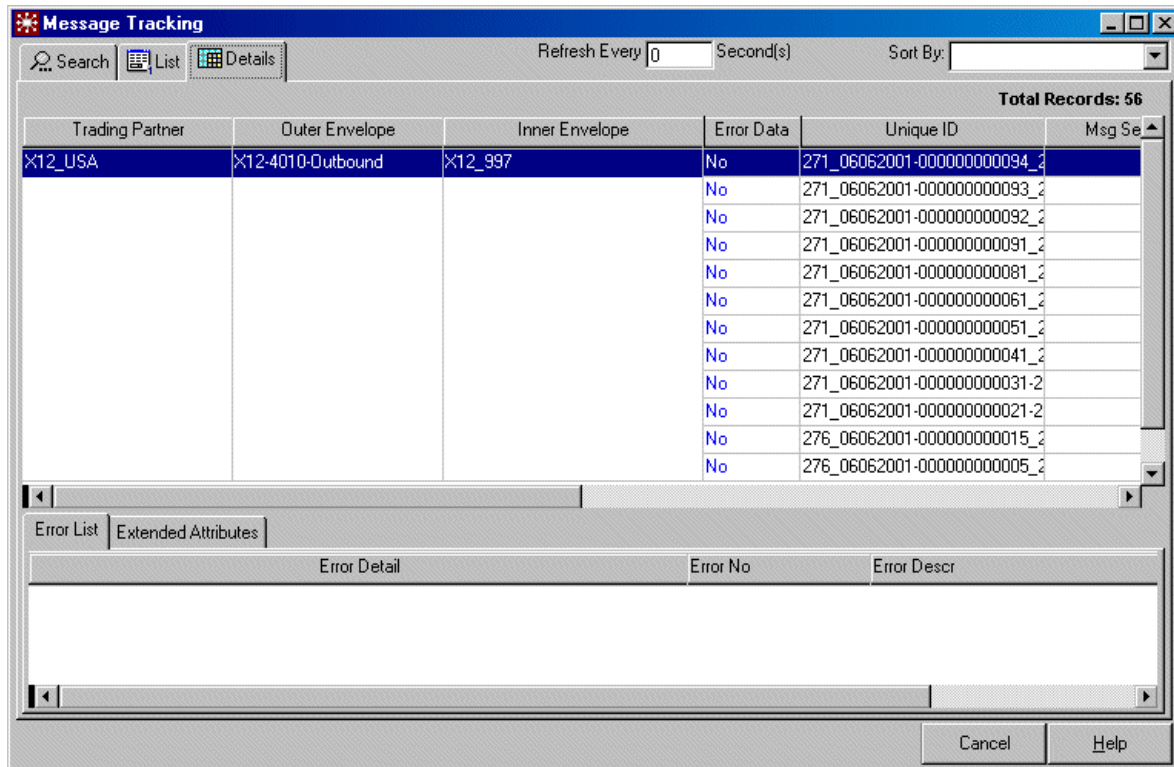


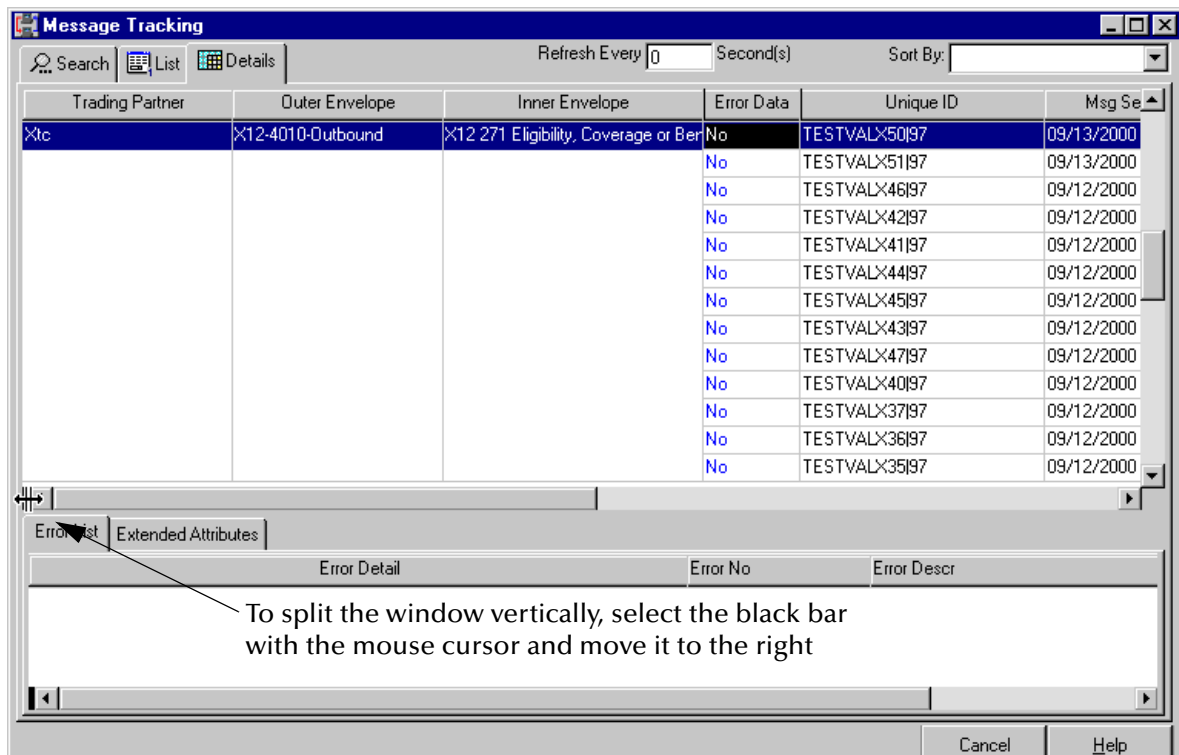
Table 116 Message Tracking Details Fields

Field Name	Description
Refresh Every	If you want to keep your view updated with the latest message traffic, set a refresh time on the window; for example, 30 seconds.
Sort By	This allows you to sort messages in any of several ways: <ul style="list-style-type: none"> ▪ (Outbound only) Msg Send Time ▪ (Inbound only) Msg Receipt Time ▪ Unique ID ▪ (Outbound only) Transfer Mode ▪ Original Message ID ▪ (Outbound only) Env Message ID ▪ (Inbound only) Ack Message ID ▪ Specify Sort Columns: this accesses the Specify Sort Columns dialog box (see Figure 177 on page 362). For instructions on using this feature, see “Specifying Sort Columns” on page 361.
Message Count	The number of messages on the list is displayed.
List of messages	All messages that meet the specified search criteria defined on the List tab are displayed. For each message, many fields of information are included. If the visible fields do not offer the information you need, use the horizontal scroll bar. You can also change the display by choosing the Sort By option and selecting Specify Sort Columns .

Table 116 Message Tracking Details Fields (Continued)

Field Name	Description
Error List Tab	<p>If a message has errors (listed in the Error Data column in red) you can highlight the message to view detailed error information on the Error List (see Figure 182 on page 366).</p> <p>For each error message included in the list, message detail, error number, and description are provided.</p>
Extended Attributes Tab	To view more information about the selected error or errors, click the Extended Attributes tab. Information about each attribute and its value is provided (see Figure 183 on page 366).

Figure 176 Splitting the Message Tracking Details Window



19.4 Specifying Sort Columns

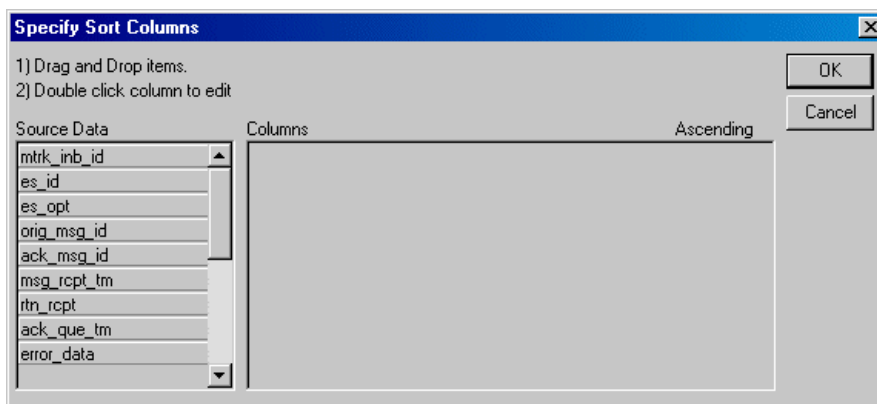
You can tailor the display of information in the **Details** tab of the **Message Tracking** dialog box. You can specify the sequence in which the columns are displayed, and also change the sequence in which information is displayed in the columns.

To specify sort columns

- 1 In the **Details** tab of the **Message Tracking** dialog box, click **Sort By**.

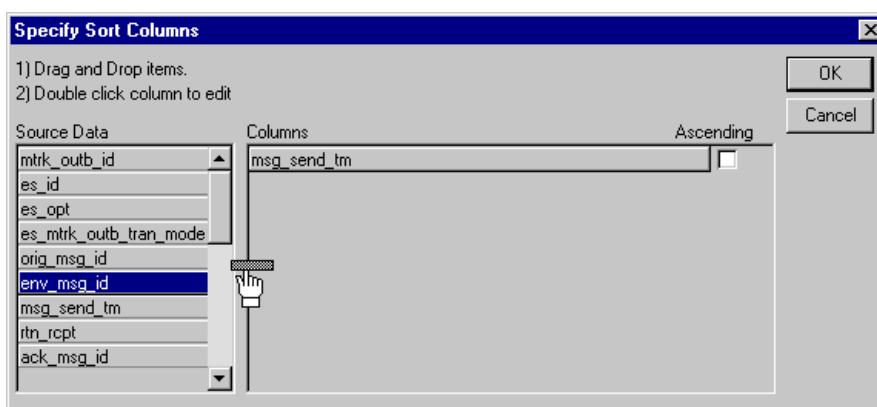
- 2 From the drop-down list, select **Specify Sort Columns**. The **Specify Sort Columns** dialog box appears, as shown in Figure 177, allowing you to choose more than one column by which the list can be sorted.
- 3 The items on the **Source Data** list are table columns from the Message Tracking tables. For more information on these columns, refer to [“ES_MTRK_INB” on page 414](#) (inbound messages) or [“ES_MTRK_OUTB” on page 416](#) (outbound messages).

Figure 177 Specify Sort Columns



- 4 Drag and drop fields from the **Source Data** List to the **Columns** list to specify column sequences, as shown in Figure 178. You can also specify **Ascending** sequence for a column, or clear the check box to display information in descending order.

Figure 178 Using the Specify Sort Columns Dialog Box



- 5 Click **OK** to save.

19.5 Understanding the Message Information

The Message Tracking **List** and **Details** tabs provide a lot of information about each envelope profile or message, listed in columns. There are more columns than are immediately viewable; use the scroll bar to see the additional columns.

The tables below provide information on the specific columns listed in the Message Tracking window.

Table 117 Message Tracking List Columns

Column Name	Description
Trading Partner	The name of the trading partner.
Outer Envelope	The name of the outer envelope.
Inner Envelope	The name of the inner envelope.
Version	The protocol version for the message.
Sender ID	The ID of the message sender.
Receiver ID	The ID of the message recipient.
Transfer Mode	The transfer mode for the message (Batch , Fast Batch , or Interactive).
Validation Collaboration	The validation Collaboration used for the message, if any.
Response Required	This field indicates whether the message expects a response (Yes or No).
Status	The current status of the inner envelope type used for the message (Active or Inactive).
Cnt Index/Total Cnt	Record count field (count index/total number of records).

Table 118 Message Tracking Details Columns

Column Name	Description
Trading Partner	The name of the trading partner.
Outer Envelope	The name of the outer envelope.
Inner Envelope	The name of the inner envelope.
Error Data	Indication of whether or not the message has errors: No (in blue) if there are no errors, Yes (in red) if there is error data.

Table 118 Message Tracking Details Columns (Continued)

Column Name	Description
Unique ID	<p>The unique ID assigned to the message.</p> <p>X12 or UN/EDIFACT Unique ID For X12 and UN/EDIFACT, the structure of the unique ID is determined by your specifications, as follows:</p> <p>Outbound— if there is a validation Collaboration, the unique ID is defined in the Collaboration. If you used the Validation Rules Builder to create the Collaboration, the unique ID is determined by the settings in the UniqueId parameter in the ValidationBuilder.Properties file. If there is no validation Collaboration, you must define the unique ID in the message ID node of the eX_Standard_Event.ssc file.</p> <p>Inbound— since there is always a validation Collaboration for inbound transactions, the unique ID is always defined by the Collaboration. For examples, see Figure 179 (X12) and Figure 181 (UN/EDIFACT).</p> <p>RosettaNet Unique ID The unique ID is composed as follows:</p> <ol style="list-style-type: none"> 1 Global Business Identifier—The sender's 9-digit Global Business Identifier, followed by the pipe symbol 2 The Global Process Indicator Code from the Process Header (for example, 2A1 or 3A2) followed by the pipe symbol 3 The Instance Identifier from the Process Header, followed by the pipe symbol 4 The Global Transaction Code from the Transaction Header (for example, Create Purchase Order), followed by the pipe symbol 5 The Instance Identifier from the Transaction Header, followed by the pipe symbol 6 The Global Business Action Code for a business action or Global Business Signal Code for a business signal, from the Action Header (for example, Process Transaction Request), followed by the pipe symbol 7 The Instance Identifier for the business action or business signal, from the Action Header, followed by the pipe symbol. 8 A three-character code indicating the type of response message expected: REC for Receipt Acknowledgment, PRF for Action Response, or ACC for Acceptance Acknowledgment. If no response message is expected, this code is omitted from the unique ID. <p>An example of a RosettaNet unique ID is shown in Figure 180.</p>
Msg Send Time (Outbound)	The time at which the message was sent, in the format MM/DD/YYYY HH:MM:SS.
Response Required	This field indicates whether the message expects a response (Yes or No).
Ack Time (Outbound)	The time at which the acknowledgment message was received.
Send Cnt (Outbound)	The number of times that the message has been sent.
Msg Rcpt Time (Inbound)	The time at which the message was received, in the format MM/DD/YYYY HH:MM:SS.
Ack Queue Time (Inbound)	(for acknowledgments only) The time at which the acknowledgment was queued, in the format MM/DD/YYYY HH:MM:SS.

Table 118 Message Tracking Details Columns (Continued)

Column Name	Description
Original Msg ID	The pointer to the storage location, in the database, of the message. Note: The message is stored with its envelope information. However, for X12 batch or fast batch messages, this includes only the inner envelope (ST-SE). For interactive messages it includes all the enveloping, ISA-IEA.
Env Msg ID (Outbound)	The pointer to the storage location, in the database, of the message (same as Original Msg ID).
Ack Msg ID	For messages that have been acknowledged only: the pointer to the storage location, in the database, of the acknowledgment message.
Cnt index/Total Cnt	Record count field (count index/total number).

Figure 179 Example of an X12 Unique ID

Outer Envelope	Inner Envelope	Error Data	Unique ID	Response Required	
X12-4010-Inbound	X12_850PurchaseOrder	Yes	394-20001130163606	No	11/30/2
X12-4010-Inbound	X12_270	Yes	-20001130152524	No	11/30/2
X12-4010-Inbound	X12_270	No	ORA_Delim_112900_02 2	No	11/29/2
X12-4010-Inbound	X12_270	No	ORA_Delim_112900_01 2	No	11/29/2
		No	FB_112900PM_32 68	Yes	11/29/2
		No	FB_112900PM_31 68	Yes	11/29/2
		No	FB_112900PMM_30 68	Yes	11/29/2
		No	FB_112900P_32 68	Yes	11/29/2
		No	FB_112900P_31 68	Yes	11/29/2
		No	FB_112900P_30 68	Yes	11/29/2
		No	FB_112900_32 68	Yes	11/29/2
		No	FB_112900_31 68	Yes	11/29/2

Figure 180 Example of a RosettaNet Unique ID

Trading Partner	Outer Envelope	Inner Envelope	Error Data	Unique ID	Response Required	
TP_001	UN/EDIFACT-4B-Inbound	EDF_ORDERSPurcOrderM	No	ORDERS_01302001_V4_004 4	Yes	
			No	ORDERS_01302001_V4_004 3	Yes	

Figure 181 Example of a UN/EDIFACT Unique ID

Trading Partner	Outer Envelope	Inner Envelope	Error Data	Unique ID	Response Required	
TP_001	UN/EDIFACT-4B-Inbound	EDF_ORDERSPurcOrderM	No	ORDERS_01302001_V4_004 4	Yes	
			No	ORDERS_01302001_V4_004 3	Yes	

19.6 Viewing Message Errors

This is the focal point of message error troubleshooting. Although you cannot repair the message in the **Message Tracking** dialog box, you can view the list of errors and then look at or print the actual message. Once you know what the problem is, you can correct it, in coordination with the trading partner if needed.

To view message errors

Before you begin, complete [“To view message details” on page 359](#).

Note: If a message has errors, the value **Yes** shows in red in the **Error Data** column.

- 1 On the **Details** tab, highlight a message that has errors.
- 2 View the error information displayed on the **Error List** tab at the bottom of the **Details** tab, as shown in Figure 182. Error detail is listed, along with the error number and a description.

Figure 182 Message Tracking Details Error List

	X12_276	No	276_05262001-0000000000	No	5/26/20
		No	276_05262001-0000000000	No	5/26/20
		Yes	276_05262001-0000000000	No	5/26/20
		No	276_05262001-0000000000	No	5/26/20

Error ListExtended Attributes

Error Detail	Error No	Error Descr
BHT02 has invalid code	7	
Nack send to TP	100	

- 3 To view more information about the error or errors, click the **Extended Attributes** tab, as shown in Figure 183.

Figure 183 Message Tracking Details Extended Attributes List

	X12_276	No	276_05262001-0000000000	No	5/26/20
		No	276_05262001-0000000000	No	5/26/20
		Yes	276_05262001-0000000000	No	5/26/20
		No	276_05262001-0000000000	No	5/26/20

Error List

Extended Attributes

Attribute Name	Value	Created By	Created Time
ISA13 IC CONTROL NUM	000000293	EX_ADMIN	05/26/2001 15:15:14
GS06 FG CONTROL NUM	194	EX_ADMIN	05/26/2001 15:15:14
ST02 TS CONTROL NUM	0003	EX_ADMIN	05/26/2001 15:15:14

- 4 Depending on the message, you might also be able to view additional information by using the tools on the Message Tracking function toolbar:

- ♦ If the selected message has a value in the **Original Msg ID** field, click **View**

Original Message  to view the message.

- ♦ If the selected message has a value in the **Env Msg ID** field, click **View**

Enveloped Message  to view the message.

Note: If the message is an outbound batch message, you will see only the inner segments (ST-SE for X12, UNH-UNT for UN/EDIFACT). If the message is interactive, or is an inbound batch message, you will see all the envelope layers.

- ♦ If the selected message has a value in the **Ack Msg ID** field, click **View**

Acknowledgment Message  to view the message.

In all cases, the actual message appears in a separate window, as shown in Figure 186. The message can be viewed or printed, but cannot be edited.

Note: If the message was compressed when stored in the database, as specified in the inner envelope, the message cannot be viewed.

Figure 184 Original Message View (RosettaNet)

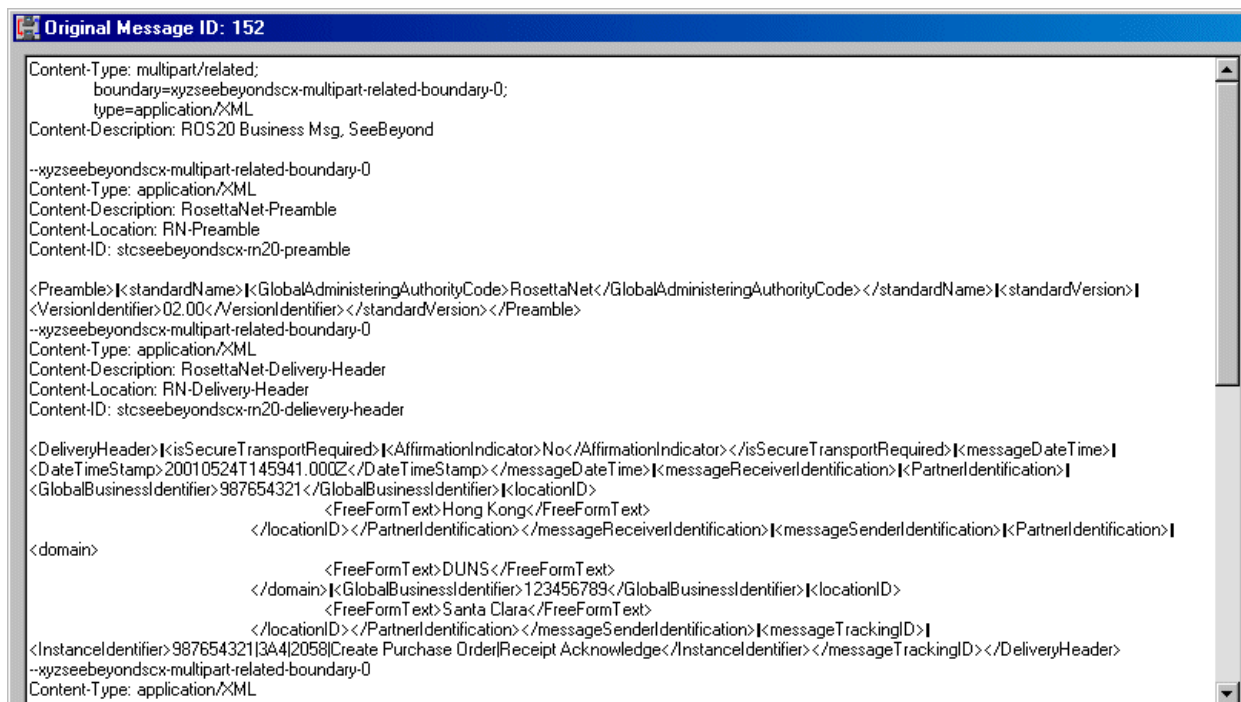


Figure 185 Original Message View (X12)

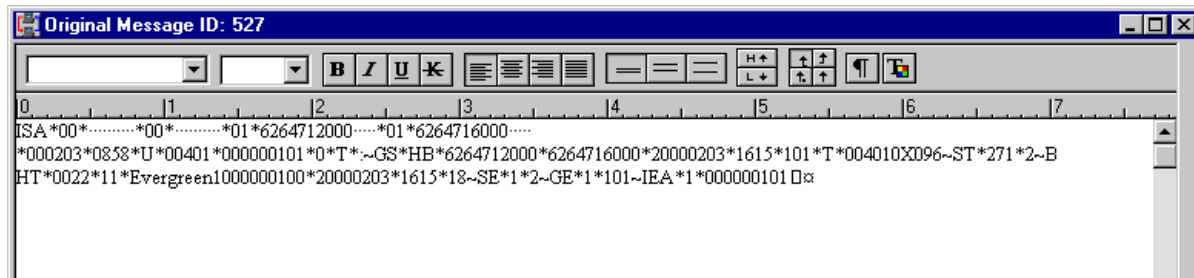


Figure 186 Original Message View (UN/EDIFACT)



5 When done, click  to close the Message Tracking dialog box.

Maintaining and Using Reports

e*Xchange Client for Windows comes with a selection of predefined reports. You can also view additional reports created with the Seagate Crystal Reports™ reporting tool from within e*Xchange Client for Windows; but you must first set them up in Report Maintenance.

The Report Maintenance tool provides features by which you can provide selection criteria and viewing options to users. These options can be used to meet a wide range of needs with just a few reports.

The e*Xchange Partner Manager includes viewing options as part of the report definition; for example, scroll, zoom, and print options are available when the report is displayed. You determine which options are available on specific reports via Report Maintenance.

This chapter covers the following information on setting up and using reports:

Setting up reports—instructions for setting up and maintaining report parameters and options in e*Xchange Partner Manager. Refer to [“Report Maintenance” on page 369](#).

Using reports—a list of standard default reports and information on viewing, printing and forwarding reports.

Note: For more information on the predefined reports that come with e*Xchange Partner Manager, refer to [“Using e*Xchange Partner Manager Reports” on page 381](#).

20.1 Report Maintenance

To use the predefined reports that come with e*Xchange, no setup is required. If desired, you can customize the reports via Report Maintenance as explained below.

To generate your own reports from e*Xchange, you must first create the reports in Crystal Reports. Follow the steps below.

- 1 Identify reporting needs. The following suggestions are provided to help you research and identify the reports that could help to support your business needs.

- ♦ **Previous Reports**

Review reports that could be generated from your previous system to determine the types of reports to be added to e*Xchange Partner Manager.


- ♦ **User Requests**
Note the reporting requests you receive from end users, or ask end users to submit suggestions for reports.
 - ♦ **Enhancements**
You can create new reports in response to new information made available by enhancements to your e*Xchange Partner Manager system.
 - ♦ **Government Reporting Requirements**
You can add new reports to meet government reporting requirements.
- 2 Create the reports you need for your business (refer to your Crystal Reports documentation for instructions). Report names must be unique and must have the extension **.rpt**.
 - 3 Copy the reports to the e*Xchange reports folder. The path to this folder is specified in the **Report Path** field, **System Defaults** dialog box. The default path can also be overridden for a specific user by the setting in the **User Preferences** dialog box. For more information, see **“Working With System Defaults” on page 198** and **“User Preferences” on page 38**.
- Note:** *If you store copies of reports on each e*Xchange Partner Manager user’s local drive, make sure that any updates are distributed to the appropriate workstations.*
- 4 Continue to **“Entering General Report Information” on page 370**.

20.1.1 Entering General Report Information

The first step is to enter general information about the report, such as its title, the file name, and where the file is stored.

Note: *To access Report Maintenance, you must be a member of the eX Administrator group.*

To add or edit a report in e*Xchange Partner Manager

- 1 On the **Functions** menu, point to **System Administration**, and then click **Report Maintenance**.
The **Report Maintenance** dialog box appears (see Figure 187).
- 2 In the left pane, highlight the level for which you want to create a report: Company, Trading Partner, Outer Envelope, or Inner Envelope.
- 3 Do one of the following:
 - ♦ To locate an existing report—double-click the level to show the reports that have been added at that level. Highlight a report to view the report information.
 - ♦ To add a new report—on the toolbar, click **New** .
- 4 On the **General** tab of the **Report Maintenance** dialog box, enter the required report identification information.

For information on specific fields, refer to Table 119.

- 5 Continue to [“Defining Report Window Controls” on page 372.](#)

Figure 187 Report Maintenance, General Page

Table 119 Report Maintenance General Fields

Field Name	Description
Report Display Name	The name of the report, as you want it to appear on the Report List. For an example of how the report display name appears to the user when running the report, see Figure 191 on page 377.
Report File Name	The file name of the report, without extension. The system automatically appends the extension “.rpt” to the file name you type. For example, if the name of your report file is TPR_01.rpt , specify TPR_01 in this field. Note: The system looks for the file in the folder specified in User Preferences. If a path is not specified in User Preferences, it uses the one specified in System Defaults.
Report Description	The report description allows you to provide more detailed information on the report. This additional information will be displayed on the Report List. For an example of the report description as the user sees it when running the report, see Figure 191 on page 377.
Status	The status of the report: Active—the report will appear on the user’s report list. Disabled—the report is not available for user selection on the report list.
Report Type	The tool used to create the report. Select Crystal Report to indicate that the Seagate Crystal Reports tool was used to create the report. Currently, this is the only available option.
Created By	The user ID of the person who added or updated the report information.

Table 119 Report Maintenance General Fields (Continued)

Field Name	Description
Created Time	The date and time the report information was added or updated.

20.1.2 Defining Report Window Controls

You can adjust how the Report window will appear to users by specifying the buttons and other controls that will be available when the user views the report.

To define Report window controls

- 1 On the **Report Maintenance** dialog box, click the **Advanced** tab.
The **Advanced** tab appears (see Figure 188).
- 2 Select the check box next to each button or control that you want the user's report window to include. For more information, see Table 120.
The results of your selections, when the user runs the report, are shown in [Figure 189 on page 374](#).
- 3 Continue to ["Defining Selection Criteria Parameters" on page 374](#).

Figure 188 Report Maintenance Advanced Fields

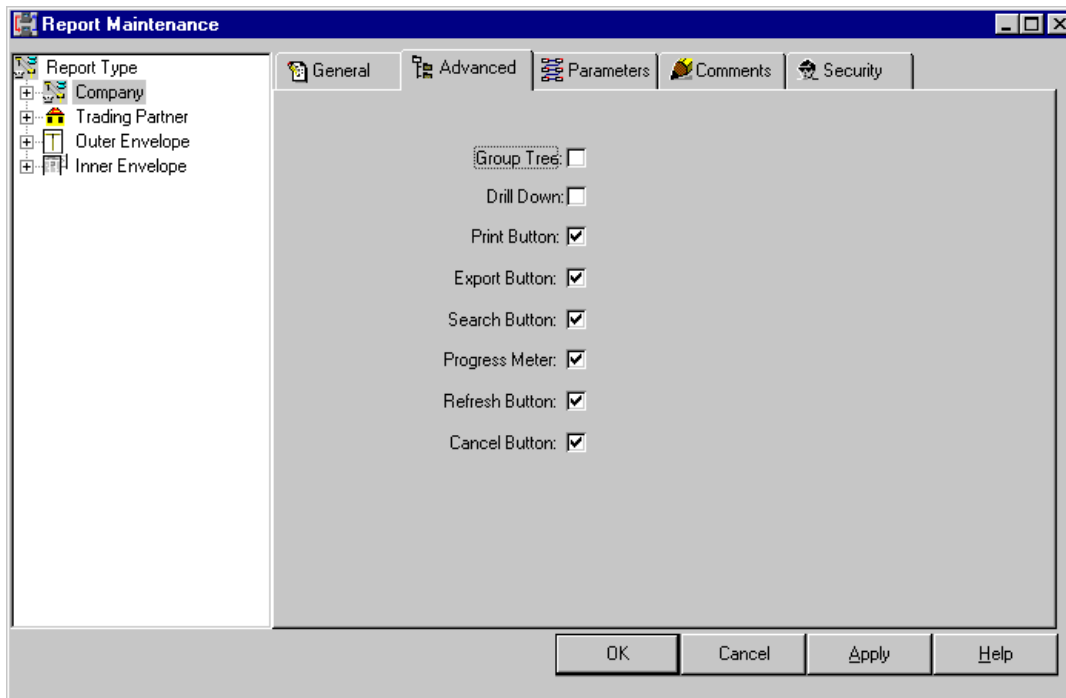


Table 120 Report Maintenance Advanced Fields

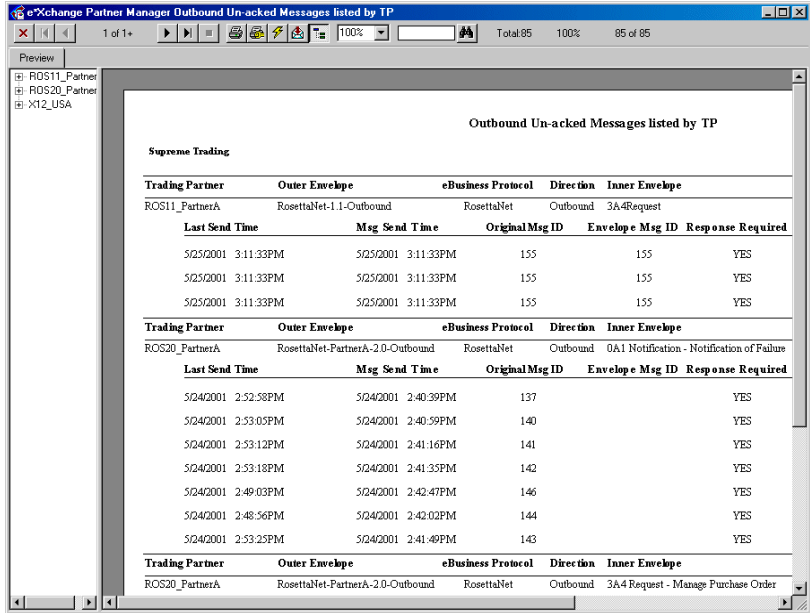
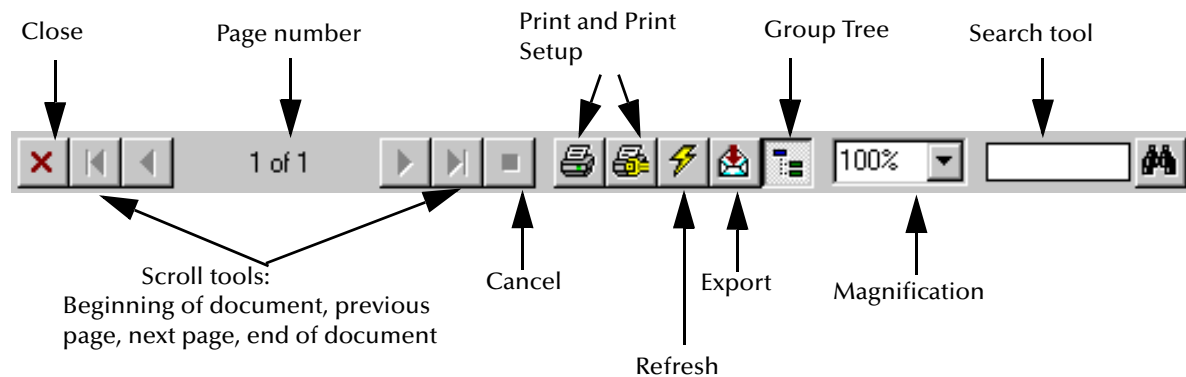
Field Name	Description
Group Tree	<p>If Group Tree is selected, a Windows Explorer-like group tree is visible in the report window. The right pane shows the report, and the left pane shows the hierarchy of groups and subgroups. When you click a node in the left pane, the relevant information is displayed in the report. The Group Tree icon is displayed with the report controls, allowing you to toggle the group tree view on and off. An example of a report showing a group tree is shown below.</p> 
Drill Down	<p>If Drill Down is selected, the drill-down feature is available for the report. This means that when you double-click an item on the report, you can access more detailed information about that item, providing that the data is there. The drill-down cursor is displayed as a magnifying glass.</p> <p>For example, you could construct a report so that it included a list of trading partners, with drill-down capabilities to show more detailed information about each trading partner.</p>
Print Button	If this is selected, a print button is available in the report window.
Export Button	If this is selected, an export button is available in the report window, allowing the user to export the report to an external file, e*Xchange Folder, Lotus Notes Database, or Microsoft Mail (MAPI) program.
Search Button	If this is selected, a search facility is available in the report window.
Progress Meter	If this is selected, a progress meter is displayed while the system is preparing the report for display.
Refresh Button	If this is selected, a refresh button is available in the report window, updating the report with the most recent information.
Cancel Button	If this is selected, a cancel button is available in the report window.

Figure 189 Report Window Tools



20.1.3 Defining Selection Criteria Parameters

You can define selection criteria so that users can limit the scope of data generated for the report. By setting parameters, you provide a set of search fields available to users when running a report, so that they can specify the range of data to be included on the report.

Use the fields on the **Parameters** tab of the **Report Maintenance** dialog box to define report selection parameters (see Figure 190). This dialog box allows you to specify the database columns that will be represented on the report. You can also restrict the report to values meeting certain criteria, provide default values, and offer selection lists to your users. You can define user lookup parameters either as lists or as SQL statements.

For examples of settings that result in specific reports, look at the setup for the default reports that come with e*Xchange Partner Manager. For more information, refer to [“Sample Report Settings” on page 379](#).

Figure 190 Report Maintenance, Parameters Page

Table 121 Report Maintenance Parameters Fields

Field Name	Description
Parameter Order	A number that specifies the position of the current parameter on the Report List . Each parameter must be sequentially numbered, beginning with 1 . For example, if you are creating the first of three parameters, type 1 .
Prompt	The label that will appear to the left of the selection criterion field on the Report List when a user selects this report from the list. For example, if you want a user to enter the first date within a range, specify Start Date as the field label. For an example of how the prompt appears to the user when running the report, see Figure 191.
Report Formula	The name of the Crystal Reports report formula used on the report, if applicable. The report formula combined with the user's selection criteria result in the displayed report.
Column Name	The name of the report column to query with selection criteria specified by the user; for example, NAME is the name of the column in which the trading partner name is stored, in the ES_TPH table.
Display	If this check box is selected, report parameters are display-only; the user cannot enter parameters in the Value field. If this check box is cleared, the user can enter values.

Table 121 Report Maintenance Parameters Fields (Continued)


Field Name	Description
Operator	<p>The mathematical operator used to determine the data to be used in the report. For example, if you specify a column name, select “=” as the operator, the report will show all values matching the parameters input by the user.</p> <p>For example, suppose the Column Name is “es_tph.status”, you select operator “=”, and you also define Lookup Type “list” and Lookup List “D” and “A”. If the user select “A” for the prompt, the system interprets the statement as “where es_tph.status = ‘A’”.</p>
Default Value	<p>The initial value you want to appear on the report selection dialog box for this parameter, if any.</p> <p>For an example of how a default value appears to the user when running the report, see Figure 191.</p>
Lookup Method	<p>This determines the lookup method offered to the user on the Reports dialog box when the user clicks the lookup icon (). Choose one of the following:</p> <p>Calendar—if the user clicks the Search button, a calendar appears, for selection of a date.</p> <p>None—no lookup is provided; the user must enter the value.</p> <p>Search Button—if the user clicks the Search button, the Lookup Screen appears (see Figure 192 on page 378).</p>
Parameter Prefix	<p>If multiple expressions are used to create the report, specify the character to be used before a parameter or retrieval condition; for example, “(” (an open parenthesis).</p>
Parameter Postfix	<p>If multiple expressions are used to create the report, specify the character to be used after a parameter or retrieval condition; for example, “)” (a close parenthesis).</p>
Logical Operator	<p>If you enter more than one parameter for the report, you can specify a logical operator to connect the current parameter to the next one:</p> <ul style="list-style-type: none"> ▪ And—the report will include records that meet both conditions. ▪ None—no logical operator is applied to the parameter. ▪ Or—The report will include records that meet the conditions specified in any one of the parameters.
Parameter Case	<p>This field is provided in case the data in your database is case-sensitive and the program does not do any case conversion. Choose one of the following values:</p> <ul style="list-style-type: none"> ▪ Any—leave the parameter as it is entered ▪ Lower—convert the parameter to lower case ▪ Upper—convert the parameter to upper case
Parameter Type	<p>The parameter data type. For example, if the selection criterion is a date, the data type could be either Date or Datetime. If the selection criterion is a number, the data type would be Integer.</p> <p>For an example of how the parameter type appears to the user when running the report, see Figure 191.</p>

Table 121 Report Maintenance Parameters Fields (Continued)

Field Name	Description
Lookup Type	This determines the type of list that will be available to the user in the Lookup Screen : <ul style="list-style-type: none"> ▪ List—list the fields to be included on the report, with no space between list items and a semicolon at the end of each item, including the last. ▪ None—no lookup is provided. ▪ SQL—define the report parameters by means of a SQL statement, using normal SQL syntax. No ending semicolon is required.
Lookup Detail	This defines the parameters that the user can choose when viewing the report. Figure 192 shows the results of the following lookup detail setting: A;l; If the lookup type is List, a trailing semicolon is needed, as shown above. If the lookup type is SQL, a trailing semicolon is not required.

Figure 191 Sample Report Selection

The screenshot shows a window titled "Reports" with a list of reports and a parameter table below it.

PM Profile Level	Report Display Name	Report File Name
Trading Partner	Inbound Messages listed by TP with Error Data	all_inbound_messages
	Inbound Messages listed by Trading Partner	all_inbound_messages
	Inbound Un-acked Messages listed by TP	un_acked_messages
	Outbound Messages listed by TP with Error Data	all_outbound_messages
	Outbound Messages listed by Trading Partner	all_outbound_messages
	Outbound Un-acked Messages listed by TP	un_acked_messages_outbound
Outer Envelope	Inbound Messages listed by TP	outer_env_inbound_messages
	Outbound Messages listed by TP	outer_env_outbound_messages
Inner Envelope	Inbound Messages for a given TP with Error Data	all_inbound_messages
	Inbound Messages within a Timeframe	all_inbound_messages
	Inbound Un-acked Messages for a given TP	un_acked_messages
	Outbound Messages for a given TP with Error Data	all_outbound_messages

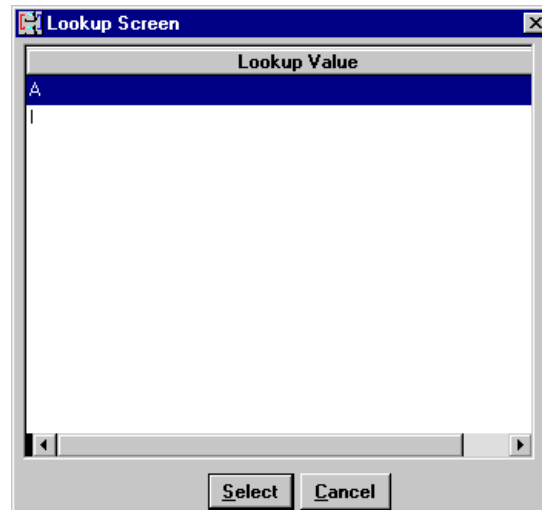
Prompt	Operator	Parameter Type	Value	Lookup Icon
Msg Rcpt Time	>=	Datetime		
Msg Rcpt Time	<=	Datetime		
Name	=	Character		

Annotations in the image:

- Lookup Icon**: Points to the magnifying glass icon in the first row of the parameter table.
- Default Value (if any)**: Points to the empty value field in the first row of the parameter table.
- Parameter Type**: Points to the "Character" value in the third row of the parameter table.

Buttons at the bottom: Cancel, View, Help.

Figure 192 Lookup Screen



When the user viewing the report clicks the lookup icon (see Figure 191), the **Lookup Screen** appears, as shown in Figure 192. The values offered for selection are determined by values entered in the **Lookup Detail** field when defining the report. In this example, the user can view either items with a status of A (active) or those with a status of I (inactive).

To define selection criteria

The instructions below provide general information for defining report criteria.

Before you begin:

- Complete [“Defining Report Window Controls” on page 372](#).
- Determine which columns of report information you want to provide to users when they generate the report.

- 1 On the **Report Maintenance** dialog box, click the **Parameters** tab.



The **Parameters** tab appears (see [Figure 190 on page 375](#)).

- 2 Enter the selection criteria for the first parameter in the open fields.

For more information, see [“Report Maintenance Parameters Fields” on page 375](#).

Note: Use the **Report Formula** field to include a list of the selection criteria specified by the user at the bottom of the report.

- 3 Do either of the following:

- ♦ To add another parameter, click **New** , and then repeat step 2 above.
- ♦ To delete a parameter, select the row of information you want to delete at the bottom of the page and click **Delete** .

- 4 Continue to [“Defining Contacts, Notes, Action Items, and User Security” on page 380](#).

Sample Report Settings

The e*Exchange Partner Manager comes with a number of predefined reports.

You can review the settings for these reports to see how the settings for certain parameters result in a certain report format. Use this information to tailor your own reports to meet the needs of your specific implementation.

Figure 193 shows the parameter settings for one of the reports that comes with e*Exchange Partner Manager. It has the following features:

- References the error_data column in the es_mtrk_inb message tracking table
- Lookup method is a search button
- Lookup type is a list
- Choices are Y and N
- Default value is Y

Figure 193 Sample Report Settings: Report Maintenance

Report Maintenance

General | Advanced | **Parameters** | Comments | Security

Parameter Order: 1

Prompt: Error Data

Report Formula:

Column Name: es_mtrk_inb.error_data

Display: ☒ Operator: =

Default Value: Y Lookup Method: Search Button

Parameter Prefix: Parameter Postfix:

Logical Operator: Parameter Case:

Parameter Type: Character Lookup Type: List

Lookup Detail: Y;N;

Order	Prompt	Prefix	Column Name
1	Error Data		es_mtrk_inb.error_data

OK Cancel Apply Help

When the user references this report, as shown in Figure 194, the parameters listed above have the following results:

- Message error information is shown in the report
- **Search** button is available
- Clicking the **Search** button accesses a selection list
- Choices available on the selection list are Y and N
- Default value is Y

Figure 194 Sample Report Setting: Results

PM Profile Level	Report Display Name	Report File Name
Trading Partner	Outbound Un-acked Messages listed by TP	un_acked_messages_outbound
	Outbound Messages listed by Trading Partner	all_outbound_messages
	Outbound Messages listed by TP with Error Data	all_outbound_messages
	Inbound Un-acked Messages listed by TP	un_acked_messages
	Inbound Messages listed by Trading Partner	all_inbound_messages
	Inbound Messages listed by TP with Error Data	all_inbound_messages
Outer Envelope	Outbound Messages listed by TP	outer_env_outbound_messages
	Inbound Messages listed by TP	outer_env_inbound_messages
Inner Envelope	Outbound Un-acked Messages for a given TP	un_acked_messages_outbound
	Outbound Messages within a Timeframe	all_outbound_messages
	Outbound Messages for a given TP with Error Data	all_outbound_messages
	Inbound Un-acked Messages for a given TP	un_acked_messages

Prompt	Operator	Parameter Type	Value
Error Data	=	Character	Y

For more examples of specific parameter settings and their results when viewing the report, examine the parameters for the various custom reports that are provided with e*Exchange Partner Manager.

20.1.4 Defining Contacts, Notes, Action Items, and User Security

As part of setting up each report, you have the option to set up the following additional information:

- On the **Contacts** tab—contact information
- On the **Comments** tab—notes and action items
- On the **Security** tab—user access (already inherited from the parent component level, but can be customized for the current outer envelope).

None of this setup is required to save the new report. However, each of these tabs provides you with additional capabilities.

Detailed instructions on using each of these tabs is provided in additional chapters, as follows:

Contacts tab—[Storing Contact Information](#) on page 210

Comments tab—[Tracking Notes and Action Items](#) on page 216

Security tab—[Assigning Access Privileges to Trading Partner Profiles](#) on page 225

For information on using these tabs, refer to the appropriate chapter or to the online Help system.

20.1.5 Saving the Report Information

To add the report to e*Xchange, you must save the information you have specified about the report.

To save a report

- 1 Click **Apply** to save changes.
The report information and associated access permissions are saved.
- 2 Click **Close**. The **Report Maintenance** dialog box closes.
- 3 Continue to [“Testing a New Report” on page 381](#).

20.1.6 Testing a New Report

After you have added a report to the Report List and optionally created criteria selection parameters, you should test the report to make sure it is accessible to users.

To test a new report

Before you begin:

- Make sure the new report file has been copied to the standard e*Xchange report folder
 - Complete [“Saving the Report Information” on page 381](#)
- 1 On the **Options** menu, select the component type (Company, Trading Partner, Outer Envelope, or Inner Envelope), and then select **Reports**.
The **Reports** dialog box appears.
 - 2 Scroll through the report list until you find the name of the new report.
 - 3 Click the name of the new report. If you defined report selection criteria, fields that correspond to each parameter should appear at the bottom of the Report List.
 - 4 If required, type the appropriate selection criteria and click **Print**.
The Report Window appears.
 - 5 Make sure the report appears on the window, and click **Print** to make sure the report prints properly.
 - 6 All Report window tools are functions of the Crystal Reports Runtime Engine. If any of the tools on this window do not work properly, make sure the appropriate version of the Crystal Reports Runtime Engine is properly installed on your workstation.

20.2 Using e*Xchange Partner Manager Reports

You can view or print any of the reports that have been defined in your system at any time.

Note: You must be a member of the eX Administrator user group to view the reports. If you do not have access rights, the message “No Reports Defined” appears.

20.2.1 Default Reports

The e*Xchange Partner Manager includes a number of reports that have already been created and are ready to go. This includes trading partner, outer envelope, and inner envelope reports, as listed below. Some of the reports include selection parameters so that you can further narrow down the report content; for example, you can specify a date range or restrict the report to messages containing error data.

Note: To view the reports, the user must either be a member of the *ex_admin* user group or have access rights to the specific report. To grant access if you are an Administrator: on the **Functions** menu, click **System Administrator**, and then click **Report Maintenance**. In the left pane, select the report. In the right pane, click the **Security** tab and add the user to the **Select Groups/Users** list.

Trading Partner Reports

- Inbound Messages listed by TP with Error Data
- Inbound Messages listed by Trading Partner
- Inbound Un-acked Messages listed by TP
- Outbound Messages listed by TP with Error Data
- Outbound Messages listed by Trading Partner
- Outbound Un-acked Messages listed by TP

Outer Envelope Reports

- Inbound Messages listed by TP
- Outbound Messages listed by TP



Inner Envelope Reports

- Inbound Messages for a given TP with Error Data
- Inbound Messages within a Timeframe
- Inbound Un-acked Messages for a given TP
- Outbound Messages for a given TP with Error Data
- Outbound Messages within a Timeframe
- Outbound Un-acked Messages for a given TP

20.2.2 Viewing Reports

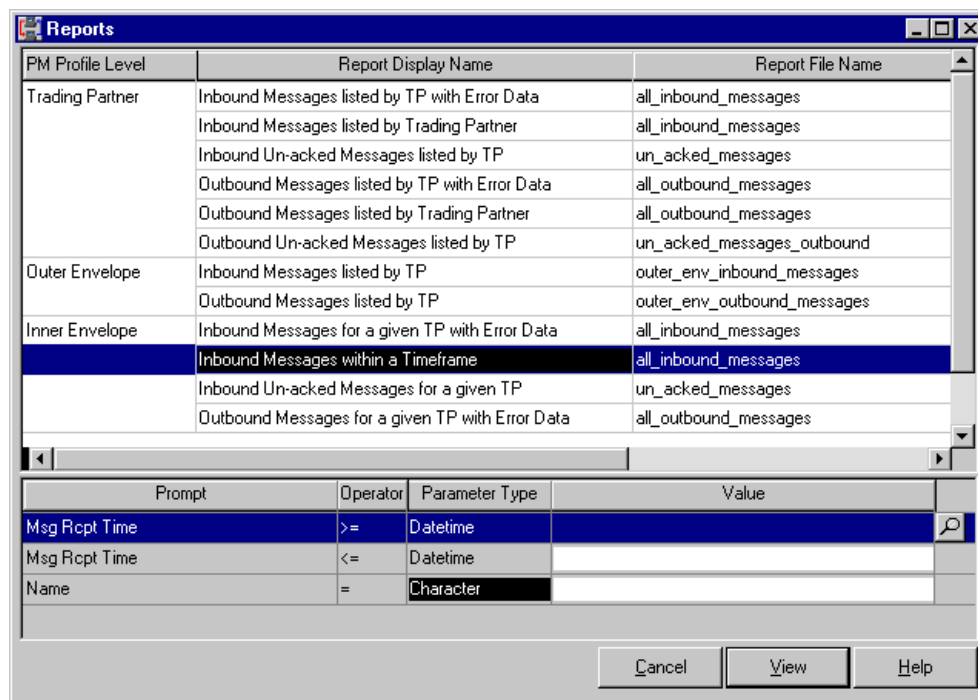
You can print any of the predefined reports for a trading partner, outer envelope, or inner envelope, at any time. For customized or additional reports, you can print them as soon as the actual report file is in place and the report definition has been added in **Report Maintenance**.

There are two ways to access report selections:


- Access reports for a specific component by highlighting the component and then clicking **Reports**  on the Function toolbar (the lower toolbar).
- Select from a list of all reports available on the system by clicking **Reports**  on the Primary toolbar (the upper toolbar).

You can also access this list via the menu: on the **Functions** menu, select **Reports**.

Figure 195 Reports Dialog Box



To generate a report

- 1 On the Partner Manager primary toolbar, click **Reports**  .
The **Reports** dialog box appears (see Figure 195).
- 2 From the **Report Display Name** column, highlight the name of the report you want to generate.

Note: You can also split the reports window into two panes. This makes it easier to compare different reports on the list. For more information, refer to [“Splitting the Reports Window” on page 385](#).

- 3 If the selected report requires selection criteria, such as a date range or a range of identification numbers, enter the appropriate values into the entry fields that appear below the list of reports.

Note: If more than three data selection criteria fields are associated with a report, use the scroll bar to the right of the list of fields to view all the available fields.

- 4 On the **Reports** dialog box, click **View**.

Depending on the amount of data generated for the report, it might take several moments for the report to be displayed.

An example of a report generated in e*Xchange Partner Manager is shown in Figure 196.

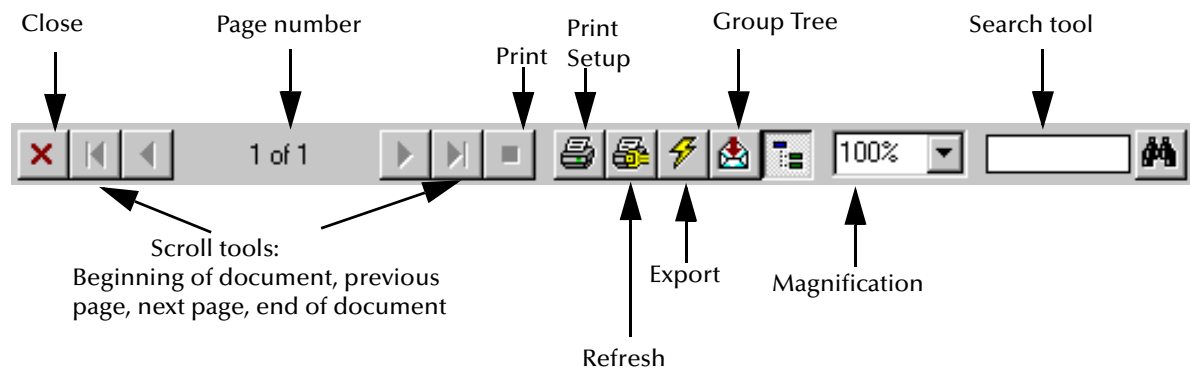
Figure 196 Report Sample

Trading Partner	Outer Envelope	eBusiness Protocol	Direction	Inner Envelope	Last Send Time	Msg Send Time	OriginalMsg ID	Envelope Msg ID	Response Required
ROS11_PartnerA	RosettaNet-1.1-Outbound	RosettaNet	Outbound	3A4Request	5/25/2001 3:11:33PM	5/25/2001 3:11:33PM	155	155	YES
					5/25/2001 3:11:33PM	5/25/2001 3:11:33PM	155	155	YES
					5/25/2001 3:11:33PM	5/25/2001 3:11:33PM	155	155	YES
ROS20_PartnerA	RosettaNet-PartnerA-2.0-Outbound	RosettaNet	Outbound	0A1 Notification - Notification of Failure	5/24/2001 2:52:58PM	5/24/2001 2:40:39PM	137		YES
					5/24/2001 2:53:05PM	5/24/2001 2:40:59PM	140		YES
					5/24/2001 2:53:12PM	5/24/2001 2:41:16PM	141		YES
					5/24/2001 2:53:18PM	5/24/2001 2:41:35PM	142		YES
					5/24/2001 2:49:03PM	5/24/2001 2:42:47PM	146		YES
					5/24/2001 2:48:56PM	5/24/2001 2:42:02PM	144		YES
					5/24/2001 2:53:25PM	5/24/2001 2:41:49PM	143		YES
ROS20_PartnerA	RosettaNet-PartnerA-2.0-Outbound	RosettaNet	Outbound	3A4 Request - Manage Purchase Order					

- 5 Do any of the following, as needed:
 - ♦ To scroll through each page of the report, use the Scroll tools (see Figure 197).

- ♦ To magnify the report for easier viewing, use the magnification tool. This tool allows you to view the report as a percentage of the actual size. Click the down arrow to select a preset percentage.
- ♦ To print the report, use the instructions provided in [“Printing Reports” on page 386](#).
- ♦ To save the data to a file, use the instructions provided in [“Saving Report Data” on page 386](#).
- ♦ To send the report to another user via e-mail, use the instructions provided in [“Sending Reports Through E-Mail” on page 387](#).

Figure 197 Report Window Tools



- 6 When you have finished viewing the report, click the **Close** button.
The **Reports** dialog box reappears.

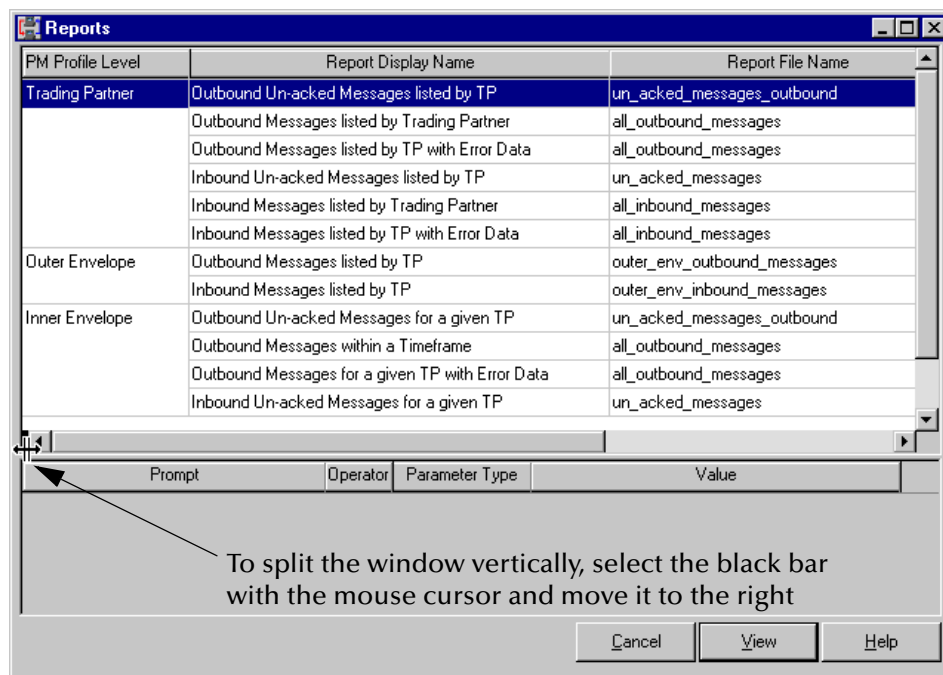
Splitting the Reports Window

You have the option to split the reports window so that you can view and compare two different parts of the list at the same time.

To split the reports window

- 1 Select the vertical black bar to the left of the horizontal scroll bar (see Figure 198).
- 2 Drag the bar to the right and then release when it is correctly positioned.
- 3 Adjust each pane as needed to view the reports lists.

Figure 198 Splitting the Display in the Reports Dialog Box



20.2.3 Printing Reports

Once you have selected a report for viewing, you can also print it.

To print a report


- 1 Select and display a report.
 - 2 If necessary, click the **Print Setup** tool to select a printer or to verify printer settings.
 - 3 From the **Reports** dialog box, click the **Print** tool.
- The **Print** dialog box appears.
- 4 Indicate whether you want to print the entire report or a range of pages within the report, and specify the number of copies.
 - 5 On the **Print** dialog box, click **OK**.

The report is printed according to your specifications.

20.2.4 Saving Report Data

When you save report data to a file, you must specify the file format and destination. You can then import the report file into another application, such as Microsoft Word or Excel.

To save report data to a file

- 1 Select and display a report.
- 2 On the **Reports** dialog box, click **Export** .

The **Export** dialog box appears (see Figure 199).

- 3 In the **Format** field, select the output format you want for the data.
For more information, see Table 122.
- 4 In the **Destination** field, select **Disk file**.
- 5 Click **OK**.

The report information is exported appropriately according to your selections.

Figure 199 Export

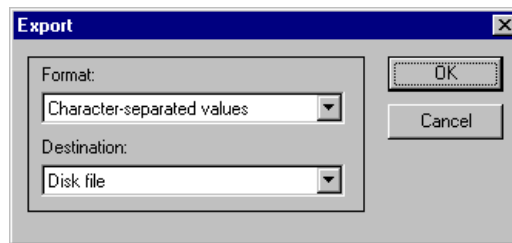


Table 122 Export Dialog Box (Report) Fields

Field Name	Description
Format	Specify the format for the data file that will be exported: for example, Excel 8.0, HTML 3.2, or Rich Text Format.
Destination	<p>Specify the destination for the file: Application, Disk File, e*Xchange Folder, Lotus Notes Database, or Microsoft Mail (MAPI). The file is exported appropriately according to the selections made. For example, if the format is Rich Text Format, the following occurs according to the selection in the Destination field:</p> <ul style="list-style-type: none"> ▪ Application: e*Xchange automatically exports the information to an RTF file, opens up Microsoft Word, and displays the file. ▪ Disk File: the Choose Export File dialog box appears. Choose or create a file name and click Save. ▪ e*Xchange Folder: the Choose Profile dialog box appears. Choose a profile or create a new one; set options if needed, and click OK. The Select a Folder dialog box appears. Select a folder and click OK. The information is exported to the selected folder. ▪ Lotus Notes Database: You must enter the appropriate values to access the Lotus Notes database. ▪ Microsoft Mail (MAPI): The Send Mail dialog box appears. Enter address and subject information as needed, with a message if desired, and click Send. The report is sent as an attachment to an e-mail message.

20.2.5 Sending Reports Through E-Mail

You can use the **Export** and **Send Mail** dialog boxes to send reports as e-mail messages from e*Xchange Partner Manager. You must specify the formatting of the attachment.

Note: To send e*Xchange Partner Manager reports through e-mail, you must have a MAPI-compatible e-mail system on your computer.

To send a report through e-mail

- 1 Select and display a report.
- 2 On the report window, click the **Export** tool.

The **Export** dialog box appears (see Figure 199).

- 3 In the **Format** field, select the output format you want for the data. For example, if you know that the recipient uses Microsoft Word, you can send the report as a Word document file attached to your e-mail message.
- 4 In the **Destination** field, select Microsoft Mail (MAPI).

The **Send Mail** dialog box appears (see Figure 200).

Note: *If this option does not work in your environment, use the instructions presented in “Saving Report Data” on page 386 to save the report data to a disk file, and then attach that file to a message using your e-mail application.*

- 5 Fill in the e-mail header fields (see Table 123).
- 6 Do any of the following, as needed:
 - ♦ To check names against your default address book, click **Check Names**.
 - ♦ To select an address from your default address book, click **Address**.
 - ♦ The Address Book window appears, from which you can select an address.
 - ♦ To send the message, click **Send**. The report is sent to the specified recipients as an attachment to the message.
 - ♦ To cancel sending the message, click **Cancel**.

Figure 200 Send Mail

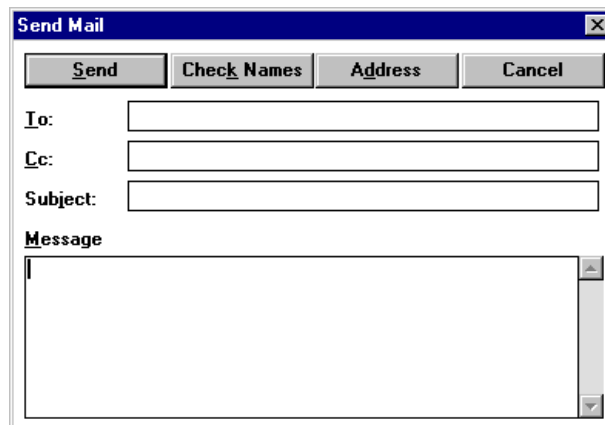


Table 123 E-mail Header Fields, Send Mail Dialog Box

Field Name	Description
To	The ID of the user to whom you want to send the report.

Table 123 E-mail Header Fields, Send Mail Dialog Box (Continued)

Field Name	Description
Cc	The ID of the user to whom you want to send a copy of the message and report.
Subject	A title that identifies the content of the message.
Message	The text of the message.

eBusiness Protocol Support

e*Xchange provides full support for the following eBusiness protocols:

- ASC X12 (all versions)
- UN/EDIFACT
- RosettaNet (versions 1.1 and 2.0)
- BizTalk (beta version 0.81) (e*Xchange Client for Windows only)

This means a number of things:

- The e*Xchange Partner Manager user interface is specifically designed to accommodate all the required attributes for sending and receiving messages in the selected eBusiness protocol.
- The logic to understand these protocols is already built into the system.
- Standard Collaborations are provided to work with these protocols, as needed.
- Additional functionality is provided, where necessary, to meet the requirements of a specific eBusiness protocol.

This appendix identifies the Collaborations, event type definitions (ETDs), and default enveloping attributes that are provided by SeeBeyond to support these eBusiness protocols.

A.1 Sample Business Process

This section shows sample businesses process for X12, RosettaNet, and UN/EDIFACT.

A.1.1 X12

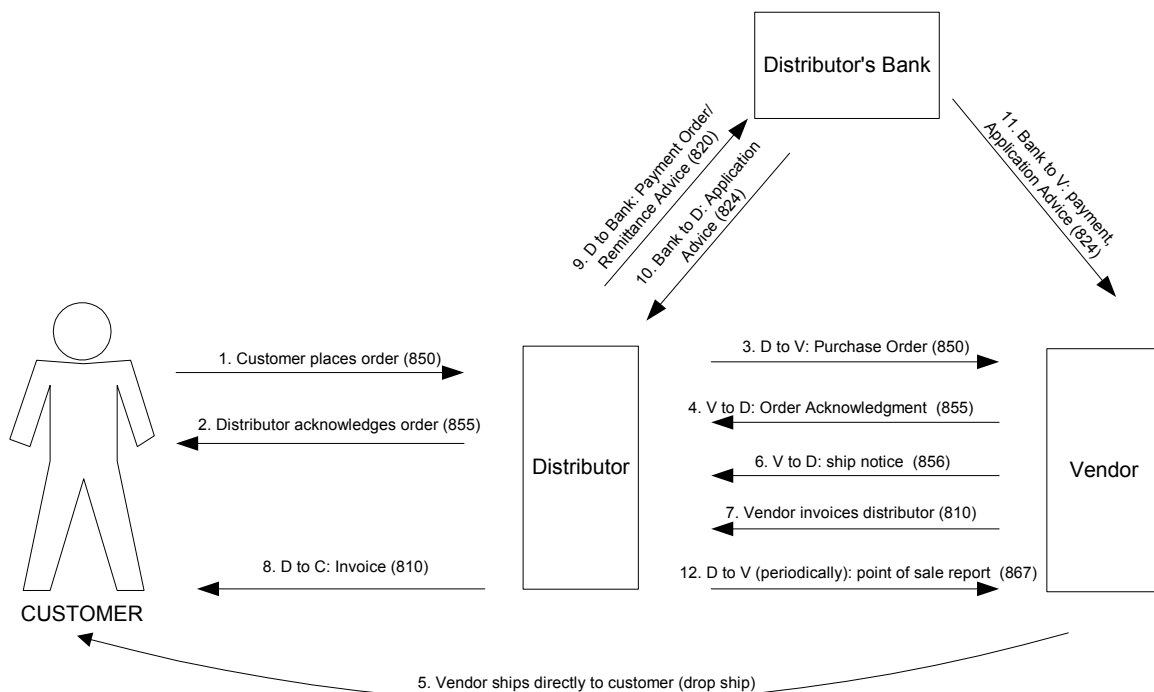
This example takes a customer order from the point where the customer orders via a Web site, through ordering, fulfillment, and payment.

In this example, messages are passed in the following sequence. Note that this is just an example; some sequences might vary, and there are alternative message types. The protocol used is X12 version 4010. The sequence and procedure would be similar for other protocols, although the message types would be different.

The sequence is as follows:

- 1 Customer places order on the Web (850).
- 2 Distributor sends acknowledgment to customer (855).
- 3 Distributor sends purchase order to vendor (850).
- 4 Vendor sends order acknowledgment to distributor (855).
- 5 Vendor ships merchandise directly to customer.
- 6 Vendor sends ship notice to distributor (856).
- 7 Vendor sends invoice to distributor (810).
- 8 Distributor sends invoice to customer (810).
- 9 Distributor sends payment order to bank (820).
- 10 Bank sends application advice to distributor (824).
- 11 Bank sends application advice to vendor (824).
- 12 Periodically: distributor sends Product Transfer and Resale (point of sale) report to vendor (867).

Figure 201 Sample Order/Fulfillment Process: X12



A.1.2 RosettaNet Scenario

Another sample business process is shown in Figure 202. In this case, the eBusiness protocol used is RosettaNet.

The sequence is as follows:

- 1 Customer Service sends out a pricing and availability query.
- 2 Product supplier acknowledges the message.
- 3 Product supplier sends the requested pricing and availability information.
- 4 Customer Service acknowledges the response.

Figure 202 Pricing/Availability Request & Response: RosettaNet



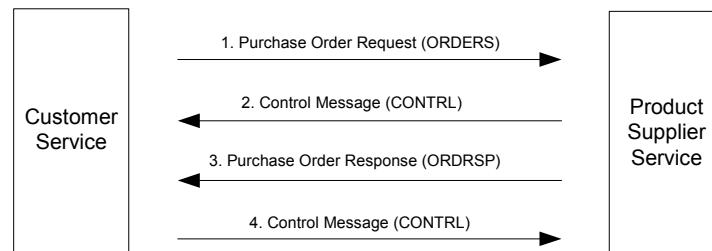
A.1.3 UN/EDIFACT

Another sample business process is shown in Figure 202. In this example, the eBusiness protocol used is UN/EDIFACT.

The sequence is as follows:

- 1 Customer Service sends out a Purchase Order Messages (ORDERS)
- 2 Upon receipt of the message, Product Supplier sends out a Control Message (CONTRL).
- 3 Upon processing of the Purchase Order Message, Product Supplier sends out a Purchase Order Response (ORDRSP).
- 4 Upon receipt of the response, Customer Service sends out a Control Message (CONTRL).

Figure 203 Purchase Order Message and Response: UN/EDIFACT



A.1.4 Sequence of Setup Actions

To set up your system to process messages in a scenario such as the X12 example given above you must complete the following steps:

- 1 Gather information from your trading partner.

You need information on the specific implementation of X12 used by your trading partner. The trading partner's eBusiness integration contact provides this information. Normally it is in the form of a set of guidelines which you can use to create a guidelines document within a third-party Implementation Guide editor. For each trading partner, you must agree on the specific implementation of each transaction.

- 2 Create validation collaborations based on the agreed-upon standard, so that e*Xchange can correctly interpret the messages.

For X12, this is done in two stages. First, take the output file of the third-party Implementation Guide editor (a SEF file) and run it through the Validation Rules Builder. This produces two e*Gate files: an Event Type Definition (ETD) file (.ssc file) and a Collaboration Rules file (.tsc file).

- 3 Set up the trading partner, and the message and enveloping information, in the e*Xchange Partner Manager.

Note: More detailed information on completing the steps needed to run e*Xchange is provided in the *e*Xchange Partner Manager Implementation Guide*.

A.1.5 Setting up the e*Xchange Partner Manager

In the e*Xchange Partner Manager graphical user interface, you set up all the information required for the sending and receiving of eBusiness messages between your company and its trading partners. Company name and address, contact information, protocol name and version, and specific attributes for each trading partner are set up in e*Xchange.

Once all the information has been set up, messages are sent and received via e*Gate.

e*Xchange Partner Manager provides additional features to help ensure your company's data interchange goes smoothly. For example, the Message Tracking feature allows you to monitor the message flow and view any errors that are generated. The

Action Items feature within the Partner Manager setup allows you to log action items relating to the trading partner, track progress, and mark them off when done.

A.1.6 Setting up e*Gate

Once all the information has been set up in e*Xchange Partner Manager, some setup is also needed in e*Gate before messages can be run. Full instructions on using e*Gate are provided in the user guides and online Help that come with e*Gate. Briefly, the following actions are required:

- Configure the e*Way that will relay messages to the e*Xchange Partner Manager
- Configure the following e*Ways:
 - ♦ ePM e*Way
 - ♦ Ack Monitor e*Way
 - ♦ Transaction Polling e*Way
 - ♦ Batching e*Way (X12-Batch)

Configuring the ePM e*Way

For a step-by-step walk-through of creating a working scenario, see the *e*Xchange Partner Manager Implementation Guide*.

A.1.7 Running the Message

Once e*Xchange Partner Manager and e*Gate have been set up correctly, messages are processed by e*Gate. The e*Xchange Partner Manager user interface does not even have to be running when messages are processed. However, the message flow can be monitored in e*Xchange Partner Manager via the Message Tracking feature.

A.2 Extended Attributes

In e*Xchange Partner Manager, any special attributes that are not common to all protocols are recorded as extended attributes.

For more information on extended attributes for a specific eBusiness protocol, refer to the following:

- BizTalk: [“Extended Attributes for BizTalk” on page 395](#)
- RosettaNet:
 - ♦ Outer envelope—[“Entering Outer Envelope Extended Attributes” on page 296](#)
 - ♦ Inner envelope—[“RosettaNet Extended Attributes—Inner Envelope” on page 310](#)

- UN/EDIFACT:
 - ♦ Outer envelope—“UN/EDIFACT Extended Attributes—Outer Envelope” on page 336
 - ♦ Inner envelope—“UN/EDIFACT Extended Attributes—Inner Envelope” on page 348
- X12:
 - ♦ Outer envelope—“X12 Extended Attributes—Outer Envelope” on page 266
 - ♦ Inner envelope—“X12 Extended Attributes—Inner Envelope” on page 276

A.2.1 Extended Attributes for BizTalk

BizTalk version 0.81 is supported in e*Xchange Client for Windows but not in the Web interface.

Table 124 Default BizTalk Extended Attributes

Code	Name	Description
FROM_LOCATION_ID	FROM LOCATION ID	The unique ID of the sending location.
FROM_LOCATION_TYPE	FROM LOCATION TYPE	The type of ID provided in the FROM_LOCATION_ID attribute. Example: From locationID="123" locationType="DUNS"
TO_LOCATION_ID	TO LOCATION ID	The unique ID of the destination location.
TO_LOCATION_TYPE	TO LOCATION TYPE	The type of ID provided in the TO_LOCATION_ID attribute.
PROCESS	RECEIVING PROCESS	The Process attribute conveys the name of the business or technical process that needs to be invoked or notified when a message is delivered. There are no restrictions on content.

Using the Validation Rules Builder

B.1 Overview

The Validation Rules Builder is a tool for converting X12 or UN/EDIFACT EDI implementation guide files into a format compatible for use with e*Xchange. This conversion tool accepts Standard Exchange Format (SEF) version 1.4 or 1.5 files and converts them into e*Gate Event Type Definition (ETD) files (.ssc files) and Collaboration Rules files (.tsc files).

The Validation Rules Builder runs from a command line such as the UNIX command line or DOS.

Note: Some standard .ssc files are provided with a full e*Xchange installation. Each file includes the protocol name, transaction number, transaction name, and protocol version. For example the ETD file for an X12 270 version 4020 transaction is *X12_4020_270.ssc*; the ETD file for a UN/EDIFACT version 3 control message is *contrl.ssc*.

B.2 Validation Rules Builder Files

Installation of the Validation Rules Builder includes the files listed in Table 125.

For complete installation instructions, refer to the *e*Xchange Partner Manager Installation Guide*.

Table 125 Validation Rules Builder Files

File Name	Description
ValidationBuilder.properties file	A text file with several parameters that identify various processing options such as the locations of input and output files. Located in the ValidationRulesBuilder directory (normally \eXchange\VRB, but might be different depending upon your installation).

Table 125 Validation Rules Builder Files (Continued)

<p>???_set_????_desc</p>	<p>A set file (for example, X12_set_4010_desc) is a text file, located in the ValidationRulesBuilder directory, that provides the transaction number, description, and ID code for each transaction within the given X12 or UN/EDIFACT version. The file X12_set_4010_desc for X12, and set files for a number of versions of UN/EDIFACT, are provided with the installation of the Validation Rules Builder. You can use your own description file in place of the default; however, use the format listed below:</p> <ul style="list-style-type: none"> ■ For X12: "NNN", "Description"\n; For example, one line might read: "104", "Air Shipment Information", "SA" ■ For UN/EDIFACT: Three characters, the code, a space, the description, the revision number, \n; For example, one line might read: * APERAK Application error and acknowledgement message 1 2 <p>The Validation Rules Builder determines the expected file type based on the setting in the DefaultDelimiters property in the ValidationBuilder.properties file.</p> <p>The standards version is used to create the root node path in the ETD as well as the output ETD file name. You can give a set file any name and place it in any directory, as long as you specify the pathname in the ValidationBuilder.properties file. If you choose not to use this file, or if the pathname pointing to the file is incorrect, the descriptions are not included in the node paths and output file names.</p>
<p>???_sec_????_desc</p>	<p>A sec file (for example, X12_sec_4010_desc) is a text file that provides ID and name for each segment and composite within the specified version of X12 or UN/EDIFACT. The file X12_set_4010_desc for X12, and sec files for a number of versions of UN/EDIFACT, are provided with the installation of the Validation Rules Builder. You can use your own file in place of the default; however, use the format listed below:</p> <ul style="list-style-type: none"> ■ For X12: "NNN", "Description"; For example, one line might read: "AAA", "Request Validation" ■ For UN/EDIFACT, either of these: <ul style="list-style-type: none"> - Four characters, the code, a space, description, \n - Five characters, the code, two spaces, description, optional usage indicator, \n <p>A sample of each format is shown below: *# ARD Monetary amount function # 2000 Date value [I]</p> <p>The standards version is used to create the root node path in the ETD as well as the output ETD file name. You can give this file any name and place it in any directory, as long as you specify the pathname in the ValidationBuilder.properties file. Also, if you do not want to use this file, or if the pathname pointing to the file is incorrect, the descriptions are not included in the node paths and output file names.</p> <p>Located in the ValidationRulesBuilder directory.</p>

Table 125 Validation Rules Builder Files (Continued)

ValidationBuilder.jar	The file you execute to start the Validation Rules Builder tool. Normally located in the \eGate\client\classes directory.
PathtoVB.properties	A pointer that indicates where ValidationBuilder.properties is located. Stored in the user's home directory; for example, c:\winnt\profiles\jdoe. for Windows NT or c:\Documents and Settings\jdoe for Windows 2000.
ValidationBuilder.ctl	Commits the Monk files used by the VRB Collaboration files to the e*Gate registry.

B.3 Limitations

The Validation Rules Builder currently does not support certain features, as listed below.

SEMREFS (semantic rules) section

The Validation Rules Builder does not support the following SEMREFS types:

- APPVALUE
- USAGE
- Exit routine

Currently, only the LOCALCODE type is supported.

CODES (numeric list of each element with its dictionary code value) section

The Validation Rules Builder does not support the following:

- Exclusion of characters ('-' within [])
- Partitioned codes in []
- No dictionary codes (no values before %)
- ***{nnnn}** combination within [], for example as shown below:

1306=1,3,5%[(1)*{6,7,8}]+850/115//15

The asterisk (*) means that all dictionary values are in the code set. A situation where the asterisk is used, indicating that all dictionary values are used, followed by curly brackets indicating extra code values that are not from the dictionary, is not supported.

B.4 Prerequisites for Running the Validation Rules Builder

In addition to the Validation Rules Builder, make sure the following software is installed before you attempt to convert any SEF files.

- The Java 1.3 runtime environment must be installed on the computer from which the Validation Rules Builder program is invoked.
- The e*Gate Integrator must be installed to verify the output ETD files (.ssc files) and Collaboration Rules files (.tsc files).

B.5 Third-Party Implementation Guide Editors

Third-party implementation guide editors are designed specifically for the purpose of editing and converting electronic implementation guides for various eBusiness protocols to the Standard Exchange Format (SEF). These editors help make it easy to develop, migrate, print, test, and distribute EDI implementation guidelines.

Examples of third-party implementation guides are:

- EDISIM, produced by Foresight
- SpecBuilder, produced by Edifecs Commerce

When you open a file in one of these implementation guides editors, you must specify the standard being used; for example, X12. You must also specify the version and the transaction set. The third-party tool then opens the implementation guide in a table format. For an example, see Figure 204.

Figure 204 Implementation Guide Open in Third-Party Tool

The screenshot shows the EDISIM Standards Editor window for standard 4010_850. The main table displays the implementation guide structure for a Purchase Order (850) with the following data:

Pos	ID	Name [Segments]	Req.	Max Use
>>	010	ST Transaction Set Header	M	1
>>	020	BEG Beginning Segment for Purchase Order	M	1
	040	CUR Currency	0	1
	050	REF Reference Identification	0	>1
	060	PER Administrative Communications Contact	0	3
	070	TAX Tax Reference	0	>1
	080	FOB F.O.B. Related Instructions	0	>1
	090	CTP Pricing Information	0	>1
	095	PAM Period Amount	0	10
	110	CSH Sales Requirements	0	5
	115	TC2 Commodity	0	>1
		LOOP SAC STARTS		25
	120	SAC Service, Promotion, Allowance, or Charge Information	0	1
	125	CUR Currency	0	1

Below the main table, there is a section for 'Transaction Set Identifier Code' and 'Transaction Set Control Number' with their respective requirements and maximum uses.

Pos	ID	Name [Elements]	Req.	Type	Min.	Max.
>>	01	143 Transaction Set Identifier Code	M	ID	3	3
>>	02	329 Transaction Set Control Number	M	AN	4	9

At the bottom, there is a list of 'Definition [Values]' for various codes, including Insurance Plan Description, Name and Address Lists, Air Shipment Information, Business Entity Filings, Motor Carrier Rate Proposal, Request for Motor Carrier Rate Proposal, and Response to a Motor Carrier Rate Proposal.

With the implementation guide open, you can customize it for your own implementation of the standard. You can perform any of the following editing actions:

- Add or remove segments
- Add or remove loops
- Change repetitions
- Change the pre-loaded lists of valid coded values
- Change the formats for data in a field (data element)
- Add conditional rules; for example, “If field A is valued, then field B is required.”

Once any needed editing is done, you can save the file and export it in SEF format.

You can use the third-party editor to create SEF files for all transactions in all standards used by your own company and your trading partners.

Once you have the SEF files, you can use the Validation Rules Builder to convert them to a format that can be read by e*Xchange.

B.6 Using the Validation Rules Builder

The Validation Rules Builder accepts Standard Exchange Format (SEF) version 1.4 or 1.5 files and converts them into e*Gate Integrator Event Type Definition (ETD) files (.ssc files) and Collaboration Rules files (.tsc files).

To convert electronic implementation guides into e*Xchange-compatible event type definitions and Collaboration Rules, you must complete the following steps:

- 1 Create input SEF files using a third-party implementation guide editor
- 2 Verify the Validation Rules Builder processing properties
- 3 Start the Validation Rules Builder
- 4 Verify the output event type definition and Collaboration Rules files

B.6.1 Creating Input Data Files

You can reformat EDI implementation guides into SEF format using a third-party implementation guide editor such as Edifecs (an EDI software productivity tool that allows users to reference EDI standards such as X12 and UN/EDIFACT) or EDISIM (a pre-production accelerator tool). Follow these guidelines:

- Since the Validation Rules Builder expects input files without ISA/IEA and GS/GE segments, you must remove these segments from the .SETS portion of the input SEF file if they exist.

SEF files produced with EDISIM do not include these segments, by default. However, SEF files produced with other implementation guide editors might include them, in which case you would have to remove them manually. To do this, open up the SEF file in the editor, go to the .SETS section of the file, and delete the ISA (Interchange control header), IEA (Interchange control trailer), GS (Functional Group header), and GE (Functional Group trailer) segments.

- You can include more than one transaction type in a single input SEF file. The Validation Rules Builder creates different ETD and Collaboration files for each transaction type.
- Copy or save the SEF files to a data directory of your choice.

B.6.2 Verifying Processing Properties

Before you start the Validation Rules Builder, you must verify the processing properties it will use to convert your input SEF files.

To verify the Validation Rules Builder properties file

- 1 Use a text editor to open the **ValidationBuilder.properties** file (see Figure 205).
- 2 Set or verify the file names, including paths (see [Table 126 on page 403](#)), for the following parameters:
 - ♦ inputFile
 - ♦ setDescFile
 - ♦ secDescFile
 - ♦ OutputPath
- 3 Set or verify the parameters relating to the specific transaction or transactions for which you will be creating validation rules, as needed (see [Table 126 on page 403](#)), including the following:
 - ♦ setDescFile and secDescFile—Verify that you are referencing the correct files for the X12 version you are using.
 - ♦ UniqueId—Set the unique ID to a value appropriate for the transaction.
 - ♦ Transactions—Set the value to the transaction or transactions for which you will be creating validation rules.
 - ♦ Verify that the delimiters parameters are set appropriately for your installation.
- 4 Set or verify the host parameters (see [Table 126 on page 403](#)), including the following:
 - ♦ RegistryHost
 - ♦ RegistryPort
 - ♦ UserName
 - ♦ Password
 - ♦ RegistrySchema
- 5 Save the properties file.

Note: The name of the **ValidationBuilder.properties** file and the parameters you specify within it are case sensitive. Also, you must use forward slashes (/) for pathnames in the properties file regardless of whether you are running the Validation Rules Builder on Windows NT or UNIX.

Figure 205 ValidationBuilder.properties Default File After Installation

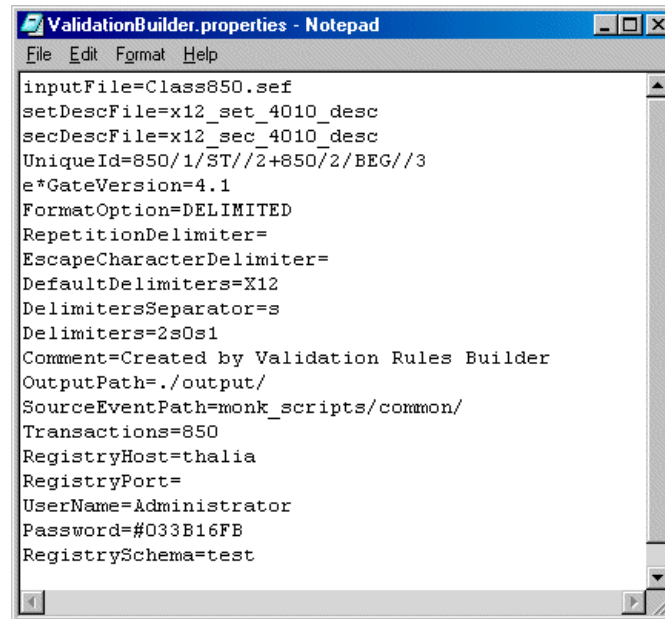


Figure 206 Customized ValidationBuilder.properties File

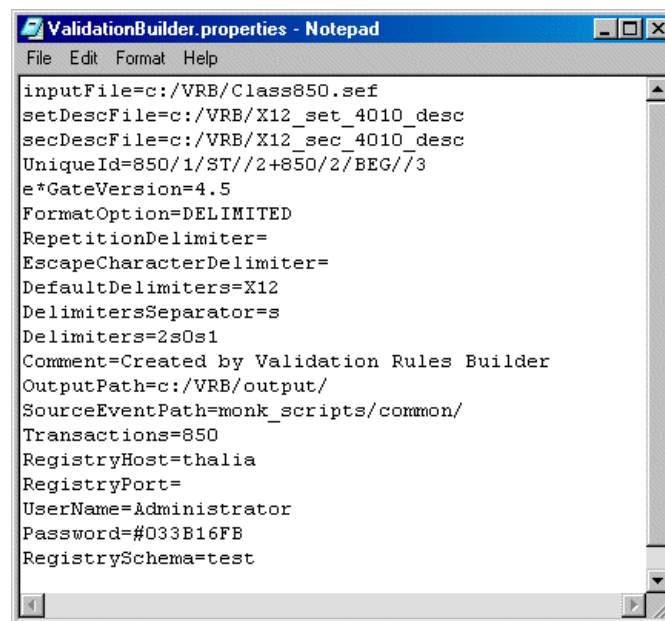


Table 126 ValidationBuilder.properties Parameters

Parameter Name	Description
inputFile	<p>The name of the input SEF file that will be converted when you run the Validation Rules Builder.</p> <p>You can specify the input file in the following ways:</p> <ul style="list-style-type: none"> ▪ A file name in the current directory (for example, Class850.sef) ▪ A path relative to the directory from which you start the Validation Rules Builder (for example, ../input/Class850.sef) ▪ A full path and file name (for example, d:/eGate/Client/ValidationRulesBuilder/Class850.sef). <p>Change the value provided, class850.sef, to an appropriate value for your operation; and make sure the corresponding input file is in the referenced directory.</p> <p>Note: If you provide only a file name, or a relative path, you will need to run the Validation Rules Builder from the directory in which the file is located, or from which the relative path is referenced.</p>
setDescFile	<p>The name of the file that associates descriptions with transaction set ID numbers. These descriptions are used to create the root node path in the ETD as well as the output ETD file name. You can enter a full path and file name, a file name in the directory from which you start the Validation Rules Builder, or a relative path starting at the Validation Rules Builder directory. The installation provides one of these files for X12 (X12_set_4010_desc, which could be used when converting 4010 files) and several for UN/EDIFACT; for example, edf_set_99b_v3_desc.</p>
secDescFile	<p>The name of the file that associates descriptions with segment codes, element/sub-element IDs, and composite IDs. The descriptions are used to create the node paths in the ETD, which are referenced from the Collaboration Rules. You can enter a full path and file name, a file name in the directory from which you start the Validation Rules Builder, or a relative path starting at the Validation Rules Builder directory. The installation provides one of these files for X12 (X12_sec_4010_desc, which could be used when converting 4010 files) and several for UN/EDIFACT; for example, edf_sec_99b_v3_desc.</p>

Table 126 ValidationBuilder.properties Parameters (Continued)

Parameter Name	Description	
UniqueID	<p>The fields that will be used as the unique identification code for each transaction generated using the output ETD. The unique ID is composed of a combination of the following, in sequence:</p> <ul style="list-style-type: none"> transaction ID—the ID number, for example 850 for a Purchase Order. segment ordinal (optional)—the numerical position of the segment within the transaction. For example, within an 850 transaction, ST is the first segment, so the segment ordinal would be 1. The segment ordinal can be omitted, in which case e*Xchange will use the first occurrence of an ST segment. If there is more than one occurrence of a specific segment within a transaction, and you want to refer to any occurrence other than the first, the segment ordinal is required. segment ID—the alphabetic ID code for the segment. element ID (optional)—the ID code for the element within the segment. element position—the numerical position of the element within the segment. optional sub-element position—the numerical position of the sub-element. <p>The following separators are used:</p> <ul style="list-style-type: none"> Each identifier must be separated with a forward slash. Sets of identifiers for different transactions must be separated with a plus sign. Within the same transaction, the plus sign can be used to concatenate different values to create a multi-valued unique ID. A minus sign in the last field indicates element position-subelement position if a subelement is included in the unique ID. <p>The default UniqueID is 850/1/ST//2+850//BEG//3. This means: For an 850 transaction, take the first element, ST, and use the second position (Transaction Set Control Number) for the first part of the unique ID. Take the BEG element, and use the third position (Purchase Order Number) for the second part of the unique ID. Concatenate these two values.</p> <p>When you install the Validation Rules Builder, the properties for an 850 transaction are already set up in the file. To run additional transactions, you must add the unique identifier for each transaction. For example, if you added a 270 transaction the line in Figure 205 on page 402 might read:</p> <p style="text-align: center;">UniqueID=850/1/ST//2+850//BEG//3+270/BHT/3</p> <p>Refer to the examples given below to see how the unique ID is built.</p>	
	This specification ...	Indicates ...
	270/1/BHT//3	You want to use field 3 of the BHT segment (Reference Identification) as the unique identifier for 270 transactions.
	850/2/BEG//5-1	The unique identifier for 850 transactions will be: the segment in the second position, BEG, element in the fifth position, sub-element 1. In this example, the unique ID would be a date. Note: You could also use 850//BEG//5-1.

Table 126 ValidationBuilder.properties Parameters (Continued)

Parameter Name	Description
	271//BHT//3+850//ST//2 You want to a) use field 3 of the BHT segment (Reference Identification) as the unique identifier for 271 transactions, and b) use field 2 of the ST segment (Transaction Set Control Number) as the unique identifier for 850 transactions.
	850//ST//2+850//BEG//3 You want to concatenate field 2 of the ST segment and field 3 of the BEG segment into a unique identifier for 850 transactions.
e*Gate Version	The version of the e*Gate Enterprise Manager you will be using to work with the output Collaboration. This value is required.
FormatOption	The data format of the transaction, which should be DELIMITED . This value is required.
RepetitionDelimiter	The character to use as a repetition delimiter. This parameter is required for the e*Gate ETD header, but the value can be empty.
EscapeCharacterDelimiter	The character to use as an escape delimiter. This parameter is required for the e*Gate ETD header, but the value can be empty.
DefaultDelimiters	The types of delimiters; one of the following: <ul style="list-style-type: none"> ▪ X12 For X12SEF files ▪ EDF For UN/EDIFACT SEF files This value is also used to begin the name of the output ETD and Collaboration files, and also the ETD rootnode name. For example, if this value is X12, and the input file is Class850.sef (see Figure 205 on page 402), the output files are: <p>X12_850PurchaseOrder.tsc X12_850PurchaseOrder.ssc</p>
DelimitersSeparator	The character you want to use to separate the delimiters that you specify on the Delimiters parameter. This value is required.

Table 126 ValidationBuilder.properties Parameters (Continued)

Parameter Name	Description
Delimiters	<p>The delimiters to be used for the output ETD and Collaboration Rules files. The first delimiter separates segments, the second separates fields, and the third separates components or sub-elements. The value provided in the default file, 2s0s1, uses "s" to dynamically point to a position in the file. This indicates that the character in the third position in the message is the segment delimiter, the character in the first position is the field delimiter (the first position is the zero position), and the character in the second position is the component or sub-element delimiter. Delimiters can also be hard-coded; for example, ~s*s: indicates that you want to use a tilde for the first delimiter, an asterisk for the second delimiter, and a colon for the third delimiter.</p> <p>The character you specify for the DelimitersSeparator parameter separates the delimiter characters.</p> <p>To specify a Hex delimiter, code \xNN, where N is a digit (0–9) or a letter (A–F). To specify an Octal delimiter, code \oMNN, where M is a digit (0–3) and N is a digit (0–7). For example, a Hex parameter would look like this: Delimiters=\x21s\x2As\x1F.</p> <p><i>Note: The delimiters value 2s0s1 is the recommended value because it is flexible. You can change these values to characters but be sure that the characters match the delimiters used.</i></p>
Comment	The main comment you want to include in the output ETD and Collaboration Rules. This parameter is required but it can be empty.
OutputPath	<p>The path and directory where the Validation Rules Builder will place the output ETD and Collaboration files. Another copy of the files is also registered in the e*Gate Registry.</p> <p>You can specify the output path in two ways:</p> <ul style="list-style-type: none"> Use a path relative to the directory from which you start the Validation Rules Builder (for example, ../output). Use a full path (for example, d:/eGate/Client/ValidationRulesBuilder/output). <p>The Validation Rules Builder does not create the directory. If you want to set a path that does not currently exist, you must create it.</p> <p>Note: If you provide only a file name, or a relative path, you will need to run the Validation Rules Builder from the directory in which the file is located, or from which the relative path is referenced.</p>
SourceEventPath	<p>The pathname that you want to appear in the source comments at the beginning of the Collaboration header.</p> <p>The default value is taken from the setting in OutputPath.</p> <p>The recommended value is monk_scripts\common since that is where e*Gate normally stores the ETD and Collaboration files.</p>

Table 126 ValidationBuilder.properties Parameters (Continued)

Parameter Name	Description
Transactions	The identification numbers of all transaction sets you want to convert. Each identification number must be separated by a comma. When you install the Validation Rules Builder, the 850 transaction is already listed. To run additional transactions, you must add unique identifiers for the transaction. For example, if you added a 270 transaction to the file in Figure 206 on page 402 , the Transactions line in the above file would read: Transactions=850,270 If a transaction set number is not listed, ETD and Collaboration Rules files are not generated for that transaction type.
RegistryHost	The name of the e*Gate registry host containing the e*Xchange schema.
RegistryPort	If needed, specify the port to be used to access the host. To use the default port, leave blank.
UserName	The user name, as defined in the e*Xchange registry schema.
Password	The password that will be required for access to the e*Gate registry. The password is associated with the UserName.
RegistrySchema	The name of the e*Xchange registry schema.

B.6.3 Starting the Validation Rules Builder

After you have verified that the properties are specified properly for the SEF file you want to convert, you can start the Validation Rules Builder.

To run the Validation Rules Builder

- 1 From a command line, run the following command:

```
java -jar ValidationBuilder.jar
```

Note: If the *ValidationBuilder.jar* file is not in the current directory and is not in your path, you must precede the file name with the path so that your system can run the file (see Figure 207).

The Validation Rules Builder reads the SEF file specified on the **inputFile** parameter in the properties file and uses it to create ETD and Collaboration Rules files.

- 2 If the conversion is successful, the Validation Rules Builder saves the appropriate ETD and Collaboration Rules files in your output directory and displays a message on your monitor (see Figure 207).

Figure 207 Running the Validation Rules Builder

```
D:\eXchange\ValidationRulesBuilder>java -Xms50M -Xmx100M -jar validationbuilder.jar
class com.stc.vrb.app.URB
Version: ValidationBuilder4.1
Build: Wed Sep 27 10:13:08 PDT 2000<Release Mode>
working on 810
Writing to file:./output/X12_810Invoice_4010.ssc
Writing to file:./output/X12_810Invoice_4010.tsc
Creating control file to commit files to e*Gate Registry
Writing to file:./output/URB.ctl
home dir is C:\WINNT\Profiles\gwhitt
home dir is C:\WINNT\Profiles\gwhitt
Successfully acquired provider!
Read 21957bytes from file
Commit was successful
Read 296560bytes from file
Commit was successful
Successfully committed files to registry!
Returned = 810*X12_810Invoice_4010*X-4010+

D:\eXchange\ValidationRulesBuilder>
```

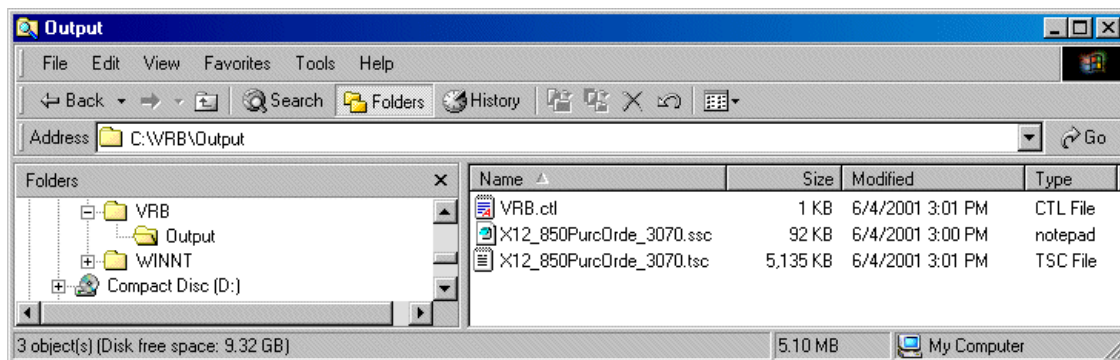
If the conversion is *not* successful, an error message appears. For information on error messages and actions to take, see Table 127.

Two sets of output files are produced:

- ♦ One set is placed in the output directory specified in the OutputPath parameter of the ValidationBuilder.properties file.
- ♦ The second set of files is automatically committed to the e*Gate Registry. The files are available the next time you run e*Gate.

The output files produced in the output directory as a result of running the Validation Rules Builder in Figure 207 are shown in Figure 208.

Figure 208 Sample Output Files



Memory Errors

If you have any problems with insufficient memory when running the Validation Rules Builder, you can add parameters that will increase the memory allocation, as shown below.

```
java -Xms50M -Xmx100M -jar ValidationBuilder.jar
```

An example of the Validation Rules Builder running with the additional parameters is shown in Figure 209.

Figure 209 Using the Validation Rules Builder Additional Memory Parameters

```
D:\eXchange\ValidationRulesBuilder>java -Xms50M -Xmx100M -jar validationbuilder.jar
class com.stc.vrb.app.VRB
Version: ValidationBuilder4.1
Build: Wed Sep 27 10:13:08 PDT 2000<Release Mode>
working on 810
Writing to file:./output/X12_810Invoice_4010.ssc
Writing to file:./output/X12_810Invoice_4010.tsc
Creating control file to commit files to e*Gate Registry
Writing to file:./output/VRB.ctl
home dir is C:\WINNT\Profiles\gwhitt
home dir is C:\WINNT\Profiles\gwhitt
Successfully acquired provider!
Read 21957bytes from file
Commit was successful
Read 296560bytes from file
Commit was successful
Successfully committed files to registry!
Returned = 810*X12_810Invoice_4010*X-4010+
D:\eXchange\ValidationRulesBuilder>_
```

B.6.4 Verifying ETD and Collaboration Rules Files

To verify the output ETD and Collaboration Rules files, open the files in e*Gate.

To verify ETD and Collaboration Rules files

- 1 Open the file.
 - ♦ To open the Event Type Definition (ssc) file, use the ETD Editor.
 - ♦ To open the Collaboration Rules (tsc) file, use the Collaboration Rules Editor.
- 2 Navigate to the directory in which the Validation Rule Builder put the output files.
- 3 Using test data, process messages through the e*Gate Editor and the pertinent e*Way.

Note: There is a size limitation (approximately 6,500 lines) on files that can be opened in the e*Gate Collaboration Rules Editor. If you attempt to open a file that is larger than this, the Collaboration Rules Editor generates an error and the file does not open. If this happens, you must edit the file in another application that can open larger files and also accommodate long lines, such as the emacs text editor for UNIX, or Microsoft Word for PCs.

B.7 Troubleshooting Tips

This section includes information on the error messages generated by the Validation Rules Builder and what to do if you encounter an error.

B.7.1 General Validation Rules Builder Error Messages

You might encounter one of the error messages described in Table 127 while you are running the Validation Rules Builder.

Table 127 Validation Rules Builder Error Messages

Error Message	Reason for Error	Action
Empty INI line	The .INI section of the input SEF file does not contain any details.	Use your Edifecs or EDISIM tool to add details to the .INI section of the SEF file, and then restart the Validation Rules Builder.
Error parsing	There is an invalid entry in either the .CODES or .SEMREFS section of the input SEF file.	Use your Edifecs or EDISIM tool to add details to the .CODES or .SEMREFS sections of the SEF file, and then restart the Validation Rules Builder.
Error parsing location	There is an invalid location specified in the .CODES, .SEMREFS, .VALREFS, or .OBJVARS section of the input SEF file.	Use your Edifecs or EDISIM tool to correct the location path according to SEF specifications.
Error parsing <i>n</i> Invalid modifier	A line in the .VALLISTS section of the input SEF file does not begin with an ampersand (&) or quote (') character. <i>n</i> represents the invalid leading character found. Example: <i>Error parsing % Invalid modifier</i>	Use your Edifecs or EDISIM tool to correct the .VALLISTS line according to SEF specifications.
Error parsing SemanticRule	There is an invalid semantic rule in the .SEMREFS section of the input SEF file.	Use your Edifecs or EDISIM tool to correct the .SEMREFS semantic rule according to SEF specifications.
Error parsing transaction	One of the following is formatted incorrectly in the input SEF file: <ul style="list-style-type: none"> a segment in the .SETS section an element in the .SEGS section a sub-element in the .COMS section. 	Use your Edifecs or EDISIM tool to correct the invalid format according to SEF specifications.
Exception in thread "main" java.lang.NoClassDefFoundError: com/stc/common/registry/RegistryControlFile	The eGate.jar file is not in the appropriate location.	Copy the eGate.jar file to the \lib\ext folder for Java version 1.3; for example, \JRE\1.3.1\lib\ext.

Table 127 Validation Rules Builder Error Messages (Continued)

Error Message	Reason for Error	Action
Failed to load Main-Class manifest attribute from ValidationBuilder.jar	The Validation Rules Builder failed to load.	Check that the Validation Rules Builder is installed and that the directory containing the ValidationBuilder.jar file is referenced on the command line (see Figure 207 on page 408).
Header not found in SEF specs	A section header in the input SEF file is not recognized. For example, the .COMS header might be mistakenly specified as .CONS.	Use your Edifecs or EDISIM tool to either remove the invalid section or change the name of the section header to a name that complies with SEF specifications.
No such file or directory	The pathname that appears next to this error message is specified incorrectly in the ValidationBuilder.properties file.	Correct the pathname in the ValidationBuilder.properties file, and then restart the Validation Rules Builder.
SEF file invalid - missing xxx where xxx is either .SETS, .SEGS, .ELMS, or .CODES	The specified section of your input SEF file is missing.	Use your Edifecs or EDISIM tool to correct the SEF file, and then restart the Validation Rules Builder.
Transaction(s) <nnn> in properties file are not defined in sef file	The ValidationBuilder.properties file is missing the transaction code for transactions in the SEF file.	Add the transaction number to the Transactions parameter in the ValidationBuilder.properties file, and then restart the Validation Rules Builder.
UniqueID property <path> is invalid! Wrong number of path components.	The UniqueID parameter in the ValidationBuilder.properties file is not specified correctly; there are too few or too many elements in the parameter list.	Correct the UniqueID parameter in your ValidationBuilder.properties file, and then restart the Validation Rules Builder.
Uniqueid property <uidPath> is invalid! Does not include path for transaction nnn	The Unique ID parameter in the ValidationBuilder.properties file does not contain a specification that corresponds to a transaction in the input SEF file.	Add the appropriate specification to the UniqueID parameter in your ValidationBuilder.properties file, and then restart the Validation Rules Builder.
Uniqueid property is invalid! Cannot include unused segment <segCode>	A segment that is marked as unused in the input SEF file is referenced on the UniqueID parameter in the ValidationBuilder.properties file. Thus, the path for this segment is invalid and the segment is not included in the output ETD.	Change the UniqueID parameter in your ValidationBuilder.properties file to include only those segments that are “used” in the input SEF file.

Table 127 Validation Rules Builder Error Messages (Continued)

Error Message	Reason for Error	Action
Uniqueid property <nnn.xxx.n> is invalid! Does not include path for transaction <nnn> Unable to complete collaboration	A unique ID sequence is not specified for the transaction in the ValidationBuilder.properties file	Add the appropriate specification to the UniqueID parameter in your ValidationBuilder.properties file, and then restart the Validation Rules Builder.
Version not specified	The .VER section of the input SEF file does not contain a version number.	Use your Edifecs or EDISIM tool to include a version number in the .VER section of the input SEF file.
Unable to complete processing your file. Out of memory! Please rerun tool with -Xms50M -Xmx100M flags following java command. These flags give the tool more memory to process your file.	The java virtual machine has run out of memory and cannot convert the SEF file.	Restart the Validation Rules Builder, but this time, add the -Xms50M -Xmx100M flags to the end of the command sequence.

B.7.2 Validation Rules Builder Error Messages for UN/EDIFACT

If there are multiple errors, each error is separated by a tilde (~).

If there are errors, they are stored in the global error_data string buffer, and the global variable error is set to #t.

An example of an error data string is shown below.

```
" 39^DTM^3^1^2^1~37^UNT^9^1^^1
```

This example includes two separate errors, with the following meanings:

Table 128 Sample UN/EDIFACT VRB Error String

String	Meaning
39^DTM^3^1^2^1	The first occurrence of the second sub-element of the first element in the third segment (DTM) has a value that is too long.
37^UNT^9^1^^1	The first occurrence of the first element in the ninth segment (UNT) has an invalid type (expects all numeric).

If you are using both UN/EDIFACT and X12, make sure the following properties in the **ValidationBuilder.properties** file are correct before running the VRB:

- DefaultDelimiters (set to X12 or EDF)

- setDescFile (set_4010_desc for X12 4010 or edf_set_00b_desc for EDF 00b)
- secDescFile (sec_4010_desc for X12 4010 or edf_sec_00b_desc for EDF 00b)
- inputFile

The error messages specific to UN/EDIFACT are listed in Table 129.

Table 129 Validation Rules Builder Error Messages for UN/EDIFACT

Error Message	Reason for Error	Action
12 = INVALID_VALUE	Invalid date or time.	Put date/time in the correct format as shown below: Date: YYYYMMDD or YYMMDD Time: HHMM , HHMMSS , HHMMSSD , or HHMMSSDD
13 = MISSING	Mandatory or conditionally required elements are not present.	Put in the required element.
21 = INVALID_CHAR	Invalid codes.	Use a code from the code list.
37 = INVALID_TYPE	Invalid elements that are not supposed to be date or time formats.	Change the element so that it matches the specified type.
39 = TOO_LONG	Length of element exceeds specified limit.	Shorten the element.
40 = TOO_SHORT	Length of element does not meet specified minimum length.	Increase the length of the element.

e*Xchange Partner Manager Database Tables

This appendix contains detailed information on the e*Xchange Partner Manager database tables that might be referenced in creating reports.

General information is provided for each table, plus an explanation of the meaning of each column within the table.

Information is provided for each of the following tables:

[“ES_MTRK_INB” on page 414](#)

[“ES_MTRK_OUTB” on page 416](#)

[“ES_WAITING_ACK” on page 418](#)

[“ES_MTRK_ERROR” on page 418](#)

C.1 e*Xchange Partner Manager Tables

C.1.1 ES_MTRK_INB

The ES_MTRK_INB table stores information about all inbound messages from trading partners, whether they are requests, responses, or positive or negative functional acknowledgments. The database stores compressed messages in ES_MSG_BINARY and uncompressed messages in ES_MSG_ASCII. The ES_MTRK_INB references these messages, stored in other tables, via the MSG_STORAGE_ID table.

Primary Key: MTRK_INB_ID

Foreign Keys:

- ORIG_MSG_ID (correlates to MSG_STORAGE_ID in ES_MSG_STORAGE)
- ACK_MSG_ID (correlates to MSG_STORAGE_ID in ES_MSG_STORAGE)

Table 130 ES_MTRK_INB

Parameter	Name/Definition	Data Type	Required?	Length
MTRK_INB_ID	The primary key of the record inserted into the table.	Numeric	Y	10,0

Table 130 ES_MTRK_INB (Continued)

Parameter	Name/Definition	Data Type	Required?	Length
ES_ID	The ID of the trading partner profile record with which this record is associated, in either the ES_TPIC (for an outer envelope) or ES_TPTS (for an inner envelope) table.	Numeric	Y	10,0
ES_OPT	This indicates the trading partner profile table referenced by the value in the ES_ID column. If ES_OPT is TS then ES_ID points to a record in ES_TPTS. If ES_OPT is IC then ES_ID points to a record in the ES_TPIC table.	Varchar	Y	2
UNIQUE_ID	The unique identifier of the specific message. This unique identifier could come from either the body of the message or a value from the message envelope.	Varchar	Y	50
ORIG_MSG_ID (foreign key)	This column points to the record in the ES_MSG_STORAGE table that identifies where the complete inbound message is stored.	Numeric	Y	10,0
MSG_RCPT_TM	The date and time at which the message was received.	Datetime	Y	
RTN_RCPT	This field stores Y or N to indicate whether the trading partner expects a return receipt when the message is received.	Char	Y	1
ACK_QUEUE_TM	If the value in RTN_RCPT is Y, this field indicates the date and time at which the acknowledgment was stored in the ES_OUT_QUEUE message queue.	Datetime	N	
ACK_MSG_ID (foreign key)	If the value in RTN_RCPT is Y, this field indicates the ID of the record in the ES_MSG_STORAGE table that identifies where the acknowledgment message is stored.	Numeric	N	10,0
ERROR_DATA	This field stores Y or N to indicate whether there are errors associated with the message. If there are errors, the information is stored in ES_MTRK_ERROR; the DIRECTION column indicates that the message is inbound, and the MTRK_MSG_ID references this record in ES_MTRK_INB.	Char	Y	1

Table 130 ES_MTRK_INB (Continued)

Parameter	Name/Definition	Data Type	Required?	Length
CREATED_BY	User ID of creator.	Varchar	Y	15
CREATED_TIME	Creation date and time (YYYYMMDDHHMMSS).	Varchar	Y	22

C.1.2 ES_MTRK_OUTB

The ES_MTRK_OUTB table stores information about outbound messages. Any message, whether it is an original outbound message being sent to a trading partner or an outbound response to an inbound message, is added to this table.

Primary Key: MTRK_OUTB_ID

Foreign Keys:

- ORIG_MSG_ID (correlates to MSG_STORAGE_ID in ES_MSG_STORAGE)
- ACK_MSG_ID (correlates to MSG_STORAGE_ID in ES_MSG_STORAGE)
- ENV_MSG_ID (correlates to MSG_STORAGE_ID in ES_MSG_STORAGE)

Table 131 ES_MTRK_OUTB

Parameter	Name/Definition	Data Type	Required?	Length
MTRK_OUTB_ID	The primary key of the table.	Numeric	Y	10,0
ES_ID	The ID of the trading partner profile record with which this record is associated, in either the ES_TPIC (for an outer envelope) or ES_TPTS (for an inner envelope) table.	Numeric	Y	10,0
ES_OPT	This indicates the trading partner profile table with which the record is associated. Identifies which table the ES_ID column value points to. If ES_OPT is TS then ES_ID points to a record in ES_TPTS. If ES_OPT is IC then ES_ID points to a record in the ES_TPIC table.	Varchar	Y	2
UNIQUE_ID	The unique identifier of the specific message. This unique identifier could come from either the body of the message or a value from the message envelope.	Varchar	Y	50
TRAN_TYPE	The eBusiness protocol used for the message: X12, RosettaNet, or BizTalk.	Varchar	Y	15
TRAN_MODE	The transaction mode (B for Batch or I for Interactive).	Char	Y	1

Table 131 ES_MTRK_OUTB (Continued)

Parameter	Name/Definition	Data Type	Required?	Length
ORIG_MSG_ID (foreign key)	This column points to the record in the ES_MSG_STORAGE table that identifies where the message (as received by e*Xchange Partner Manager) is stored.	Numeric	Y	10,0
ENV_MSG_ID	This column points to the record in ES_MSG_STORAGE that identifies where the message (enveloped and ready to be sent to the trading partner) is stored.	Numeric	N	10,0
MSG_SEND_TM	The date and time at which the message was sent the first time.	Datetime	N	
RTN_RCPT	This field stores Y or N to indicate whether a return receipt is expected when this message is sent.	Char	Y	1
ACK_TM	The date and time at which the acknowledgment message was received.	Datetime	N	
ACK_MSG_ID (foreign key)	The ID of the reciprocating inbound acknowledgment message for this outbound message (if an acknowledgment has been received), identified by ENV_MSG_ID.	Numeric	N	10,0
SEND_CNT	The number of times this message has been sent.	Numeric	Y	5,0
LAST_SEND_TM	The date and time the last resend occurred. If the message has only been sent once, this has the same value as MSG_SEND_TM; however, when a message is resent, LAST_SEND_TM is updated.	Datetime	N	
ERROR_DATA	This field stores Y or N to indicate whether there are errors associated with the message. The error messages are stored in ES_MTRK_ERROR and will point to this record in ES_MTRK_INB.	Char	Y	1
CREATED_BY	User ID of creator	Varchar	Y	15
CREATED_TIME	Creation date and time (YYYYMMDDHHMMSS)	Varchar	Y	22

C.1.3 ES_WAITING_ACK

The ES_WAITING_ACK table stores information about messages that have been sent and are waiting for an acknowledgment to be received from the trading partner. For each message, this table stores message information as well as data about the number of retries and retry period preset for this message, and how many times the message has already been sent.

When the acknowledgment is successfully received, the record in this table is deleted.

If the maximum number of retries occurs without an acknowledgment being received, the information is removed from this table. An error record is created in ES_MTRK_ERROR, and an error is recorded in the ES_MTRK_OUTB table (ERROR_DATA column).

Primary Key: WAITING_ACK_ID

Foreign Key: MTRK_OUTB_ID (correlates to MTRK_OUTB_ID in ES_MTRK_OUTB)

Table 132 ES_WAITING_ACK

Parameter	Name/Definition	Data Type	Required?	Length
WAITING_ACK_ID	The primary key of the table.	Serial	Y	
MTRK_OUTB_ID	The record ID of the associated ES_MTRK_OUTB record.	Numeric	Y	10,0
NEXT_SEND_TM	The date and time at which the message will be sent out for the next retry if an acknowledgment is not received.	Datetime	Y	
ACK_RSP_TM_S	The timeout period, expressed in seconds. For example, if the user interface is set to resend every 5 minutes, the ACK_RSP_TM_S is 300.	Numeric	Y	10,0
SEND_CNT	The number of times that the message has been sent.	Numeric	Y	5,0
ACK_RSP_RETRY_MAX	The number of times the message will be sent before an error is logged.	Number	Y	5,0
CREATED_BY	User ID of creator	Varchar	Y	15
CREATED_TIME	Creation date and time (YYYYMMDDHHMMSS)	Varchar	Y	22

C.1.4 ES_MTRK_ERROR

The ES_MTRK_ERROR table stores information about errors that have been generated relating to messages; for example, a message did not receive an expected acknowledgment or failed validation.

Primary Key: MTRK_OUTB_ID

Foreign Keys: None

Table 133 ES_MTRK_ERROR

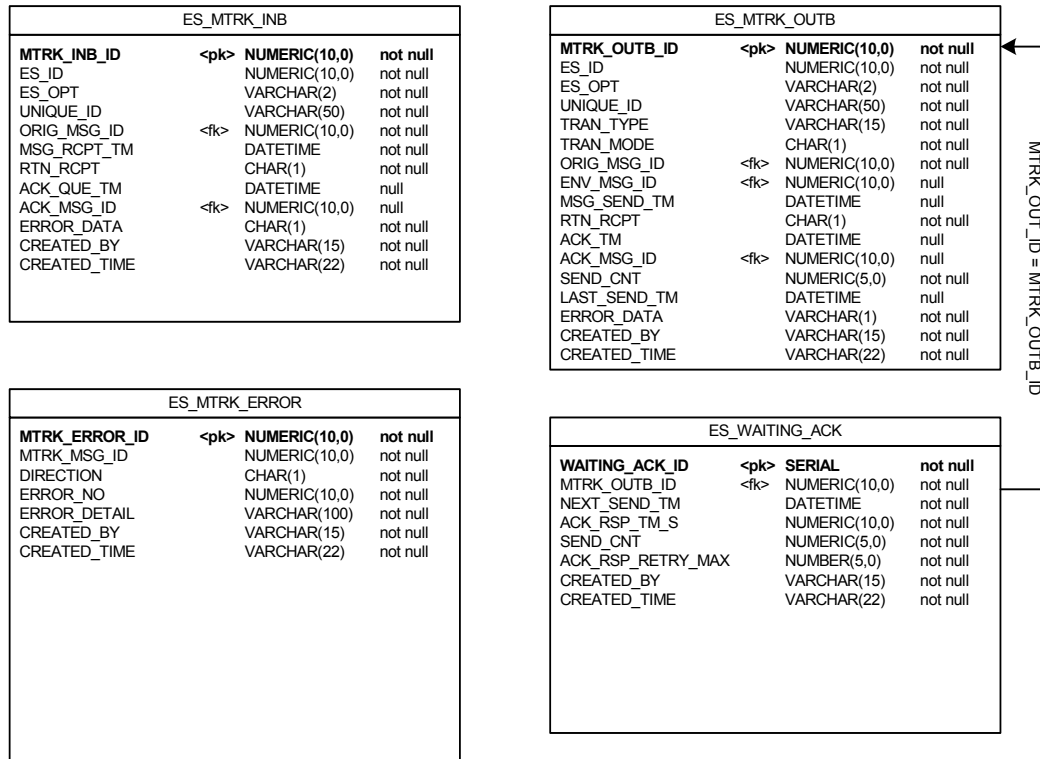
Parameter	Name/Definition	Data Type	Required?	Length
MTRK_ERROR_ID	The primary key of the table.	Numeric	Y	10,0
MTRK_MSG_ID	The ID of the record containing the error; MTRK_INB_ID in ES_MTRK_INB for an inbound message or MTRK_OUTB_ID in ES_MTRK_OUTB for an outbound message.	Numeric	Y	10,0
DIRECTION	The direction of the message: I for inbound or O for outbound. This indicates whether MTRK_MSG_ID is pointing to a record in ES_MTRK_INB (for inbound) or ES_MTRK_OUTB (for outbound).	Char	Y	1
ERROR_NO	The standard error number. This correlates to an error number set up in the ERROR_NO column of the ES_MSG_ERROR table.	Numeric	Y	10,0
ERROR_DETAIL	Information generated by the system about the error.	Varchar	Y	100
CREATED_BY	User ID of creator	Varchar	Y	15
CREATED_TIME	Creation date and time (YYYYMMDDHHMMSS)	Varchar	Y	22

An example of a report created by referencing the es_mtrk_inb message tracking table is shown in [“Sample Report Settings” on page 379](#).

C.2 Diagram of Message Tracking Tables

The message tracking tables displayed below are part of the e*Xchange database structure. Foreign keys that connect these tables are indicated by an arrow connecting the related tables and a label indicating the foreign key. Primary keys in each table are shown in boldface.

Figure 210 e*Xchange Database Structure



Glossary

access control list

A list of information associated with a trading partner profile component (company, trading partner, outer envelope, or inner envelope) that specifies which users and user groups have permission to access the components and what specific access rights they have (add, edit, full control, or read).

action item

A task request that you can save in the e*Xchange Partner Manager database for subsequent retrieval by you or another user. You can track the status of action items and use them to create electronic reminder lists for yourself.

API

An acronym for Application Program Interface, which is a set of protocols, routines, and tools for building software applications. The e*Xchange API consists of a set of Monk functions that can be called from custom validation Collaborations to interface with the database.

authentication

A process that guarantees that an electronic message came from a particular trading partner based on the electronic signature sent with the message.

code tables

The mechanism used to customize values that appear in e*Xchange drop-down lists.

Collaboration

A component of an e*Way or BOB that receives and processes Events and forwards the output to other e*Gate components. Collaborations perform three functions: they subscribe to Events of a known type, they apply business rules to Event data, and they publish output Events to a specified recipient. Collaborations use Monk translation script files with the extension **.tsc** or Java translation script files with the extension **.xts** to do the actual data manipulation.

Company

An organization with which you conduct electronic business (eBusiness). A company can consist of one or more trading partners. See also *Trading partner*.

decryption key

The key used to decrypt an incoming encrypted message. See also *key*.

digital certificate

A digital certificate is an electronic certificate, issued by a certification authority, that establishes your credentials when exchanging eBusiness messages on the Web. Your digital certificate contains your name, a serial number, expiration dates, a copy of your public key (used for encrypting messages and validating digital signatures), and the digital signature of the certificate-issuing authority so that a recipient can verify that the certificate is real. Digital certificates can be kept in registries so that authenticated users can look up the public keys of other users.

eBusiness protocol

An eBusiness protocol is a generally accepted standard for formatting and exchanging electronic messages between trading partners. ANSI X12, UN/EDIFACT, RosettaNet, and BizTalk are examples of eBusiness protocols.

EDI

EDI (Electronic Data Interchange) is a standard format for controlling the exchange of business data. The standard, X12, was developed by the Data Interchange Standards Association (DISA). X12 is used in the United States; a closely related EDI standard, UN/EDIFACT, is used internationally.

An EDI message contains a string of data elements, each representing one piece of information such as a price, product model number, or customer name. Logical groups of elements form segments; for example, several address elements might form an address segment. Elements and segments are separated by delimiters. A logical grouping of elements and segments forming one or more messages is enveloped within header and trailer segments. EDI messages can be encrypted.

e*Xchange Partner Manager (e*Xchange)

An application within the SeeBeyond eBusiness Integration Suite, that you use to set up and maintain trading partner profiles and view processed messages. e*Xchange also processes inbound and outbound messages according to certain eBusiness protocols and your validation Collaborations.

Error Table

The mechanism used to define error messages that you can use with custom validation Collaborations.

eSecurity Manager (eSM)

An add-on to e*Xchange that secures transmission of business-to-business exchanges over public domains such as the Internet.

Event (Message)

Data to be exchanged, either within e*Xchange or between e*Xchange and external systems, which has a defined data structure; for example, a known number of fields, with known characteristics and delimiters. Events are classified by type using Event Type Definitions.

Event Type Definition

An Event Type template, defining Event fields, field sequences, and delimiters. Event Type Definitions enable e*Xchange systems to identify and transform Event Types. An

Event Type Definition is a Monk script file with an extension of **.ssc** or a Java script file with an extension of **.xsc**, indicating a message structure script file.

extended attributes

Information you can store at the company, trading partner, outer envelope, and inner envelope levels, as needed for your business. For companies and trading partners, you can create extended attributes to store specific information about the company or trading partner. For outer and inner envelopes, the extended attributes are specific to a particular eBusiness protocol. Characteristics of ANSI X12 Interchange, Functional Group, and Transaction Set envelopes are examples of extended attributes you need to enter if you exchange X12 messages with a trading partner. Contrast with *General attributes*.

general attributes

Basic information that identifies companies and trading partners. For inner and outer envelopes, this includes the information you enter for a trading partner profile that is necessary for the exchange of messages but is not specific to a particular eBusiness protocol. The direction of a transmission or the password needed to send messages to an FTP site are examples of general attributes. Contrast with *Extended attributes*.

hash

Hashing is the transformation of a string of characters into a usually shorter, fixed-length value that represents the original string. The hash is a mathematical summary of the original message and is created by a hash function.

A cryptographically strong hash function has a number of requirements: It is easy to compute, one-way, and collision-free. This means that it is computationally infeasible to find a message that corresponds to a known hash, or to compose two messages whose hash values are the same.

The fixed-length hash value makes message authentication through the use of digital signatures possible, since only a small number of bytes must be used in a computationally expensive public key operation, rather than the entire message.

The most common cryptographic hash functions in use today are SHA-1 (the Secure Hash Algorithm Standard) and MD5 (Message Digest #5).

HIPAA

An acronym for the Health Insurance Portability and Accountability Act of 1996. HIPAA transactions conform to the rules mandated by this Act.

implementation guide

A document, published for a particular electronic message standard by an industry subcommittee, that describes the structure and content of a specific message type. You can use the Validation Rules Builder to convert electronic versions of ANSI X12 implementation guides to validation Collaborations used by e*Xchange.

inner envelope

An inner envelope definition is a set of parameters and other information you enter about each electronic inner envelope you process with e*Xchange Partner Manager.

This definition associates the validation Collaborations that are needed to validate each kind of message.

The version number of the eBusiness protocol that applies to the message and whether the message will be transmitted interactively or in batch are examples of inner envelope characteristics.

inner envelope definition

A set of parameters and other information you enter about each electronic message you process with e*Xchange. This definition also associates the validation Collaborations that are needed to validate each kind of message.

key

In cryptography, a key is a variable value that is applied using an algorithm to a string or block of unencrypted text to produce encrypted text. The length of the key generally determines how difficult it would be for an eavesdropper to “crack” or decrypt the message without knowing the key.

A public-key cryptography system (see PKCS) uses a public and private key pair. The public key is made generally available and is used to encrypt messages being sent to the owner of the key pair. The owner then uses the private key to decrypt the messages.

message log

A record of inbound and outbound electronic messages processed by e*Xchange. This is implemented as the message tracking facility in e*Xchange.

message tracking attributes

A set of attributes you can define to identify messages stored in the e*Xchange database. Special message tracking extended attributes can be set up and associated with a specific message type (protocol, version, and direction). Examples of attributes that are set up at the message tracking attribute level are Process Instance ID and Activity Instance ID for RosettaNet and FG and TS control numbers for X12.

message standard

The kind of eBusiness protocol you agree to use to exchange data and information with a particular trading partner. For example, ANSI X12 and RosettaNet are two different message standard.

non-repudiation

The inability of a sender to refute a message—that is, to claim at a later date that the sender was not the originator of the message. This is implemented through the use of a digital signature attached to the message. The signature can be used by the recipient to prove that the sender positively wrote the message, and that its contents were not tampered with after it was signed.

The sender of a message can also obtain irrefutable proof of receipt of the original message. Non-repudiation of receipt is implemented using an acknowledgment to the sender. This acknowledgment contains the digital signature of the message, and is also digitally signed by the receiver of the original message.

outer envelope

The trading partner profile component that you use to enter technical information about the exchange of messages between you and your trading partner. The type of eBusiness protocol you agree to use, such as ANSI X12, UN/EDIFACT, RosettaNet, or BizTalk, is an example of an outer envelope characteristic.

Partner Manager Envelope Profile

A partner manager envelope profile is a set of default extended attribute values that you define for a trading partner profile component (company, trading partner, outer envelope, or inner envelope).

PKCS

An acronym for Public-Key Cryptography System. PKCS is a set of informal intervender standard protocols developed by RSA Security, the licensors of the RSA public key cryptosystem, for making secure information exchange on the Internet possible. The standards include RSA encryption, password-based encryption, extended certificate syntax, and cryptographic message syntax for S/MIME, RSA's proposed standard for secure e-mail.

PKI

A PKI (public key infrastructure) enables users of a basically unsecure public network such as the Internet to securely and privately exchange data and money through the use of a public and a private cryptographic key pair that is obtained and shared through a trusted authority.

It is a networked system of certification authorities (CAs), registration authorities (RAs), certificate management systems (CMSs), and X.500 directories (specialized distributed databases). It enables two parties unknown to each other to exchange sensitive information and money over an unsecure network.

public key encryption

Encryption using PKCS. See *PKCS*.

Report List

A list of reports that can be generated by an e*Xchange Partner Manager user.

RNIF

RosettaNet Implementation Framework. There are two versions: 1.1 and 2.0.

SEF

See *Standard Exchange Format (SEF)*.

signature key

The key used to encode a message signature. The signature key might be the same as the encryption key; but when two different keys are used for different purposes, this is known as a dual-key system. See also *key*.

S/MIME

An acronym for Secure/Multipurpose Internet Mail Extensions; it is an Internet e-mail security standard that makes use of public key encryption.

.ssc file

A Monk Event Type Definition file. *See* Event Type Definition (ETD).

Standard Exchange Format (SEF)

The Standard Exchange Format (SEF) is a flat file representation of an EDI implementation guideline. It is a standard that defines how data segments and data elements should be structured so that the message can be understood between trading partners. It also includes validation rules, for example what are the valid values for a data element, or conditions such as if Field A is present then Field B is required.

The purpose of SEF is to put the EDI implementation guidelines in a file in machine readable format so that translators can directly import the file and use the implementation guidelines to translate or map the EDI file. The file can also be used as a means to exchange the implementation guidelines between trading partners, and can be posted on a public bulletin board or on the company's Web site in the Internet to convey to the public the implementation guidelines used by the company.

The SEF format was developed by Foresight Corporation and is now in the public domain. Programs that can directly import SEF files can save users considerable time in developing new translations or maps.

trading partner component

The trading partner profile component that you use to enter business information about your trading partner. The name of the trading partner, which could be a subdivision of a company, and the people you want to contact are examples of information you enter for a trading partner component.

transaction set

In X12, each business grouping of data is called a transaction set. For example, a group of benefit enrollments sent from a sponsor to a payer is considered a transaction set. Each transaction set contains groups of logically related data in units called segments. For example, the N4 segment conveys the city, state, ZIP code, and other geographic information.

A transaction set contains multiple segments, so the addresses of the different parties, for example, can be conveyed from one computer to the other. An analogy would be that the transaction set is like a freight train; the segments are like the train's cars, and each segment can contain several data elements in the same way that a train car can hold multiple crates.

Specifically, in X12, the transaction set is comprised of segments ST through SE.

.tsc file

A Monk Collaboration Rules file.

UN/EDIFACT

UN/EDIFACT stands for United Nations/Electronic Data Interchange for Administration, Commerce and Transport. It is a standard, developed for the electronic exchange of machine-readable information between businesses.

user group

User groups allow you to grant access permissions to a set of users with similar processing needs without having to specify individual privileges for each user. For example, the User Administrator can set up a group for users who need full access to a specific trading partner profile, but who should not be able to view information about any other profile. The User Administrator assigns each user that meets this criterion to a particular user group. Then, your eX Administrator (or another user who has been granted appropriate privileges) grants access privileges to this user group so that all members of the group can view and modify the desired information.

validation Collaboration

A Collaboration that you create to define the syntax and validate the content of electronic business-to-business (B2B) messages. One validation Collaboration is required for each type of electronic message to be processed by e*Xchange. You can use the Validation Rules Builder to automatically generate a validation Collaboration for a specific kind of X12 transaction, according to specific implementation guidelines.

Validation Rules Builder

An e*Xchange Partner Manager tool for converting electronic EDI implementation guides into files that are compatible for use with e*Xchange. This conversion tool accepts Standard Exchange Format (SEF) version 1.4 or 1.5 files and converts them into e*Gate Integrator Event Type Definition (ETD) and Collaboration Rules files.

value added network (VAN)

A private network provider that offers secure electronic data interchange (EDI) services to companies. VANs often offer EDI translation, encryption, secure e-mail, management reporting, and other extra services for their customers.

XML

Extensible Markup Language. RosettaNet PIPs are written in XML. XML is different from String in that XML messages can contain both content and information about the content.

.xsc file

A Java Event Type Definition file. *See* Event Type Definition (ETD).

.xrs file

A Java Collaboration Rules file.

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