Adeptia Suite

EDI Accelerator User Guide

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Document Conventions

Convention	Description
Text Matter in font Verdana and font size 9 point.	Explains the installation guide.
Text matter	Click on link to reach target.
	Note:

Abbreviations Used

Abbreviation	Description
EDI	Electronic Data Interchange

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1 ABOUT THIS GUIDE

This document acts as a guideline to use Adeptia Suite's Electronic Data Interchange (EDI) Accelerator for exchanging documents between trading partners. It covers a step-by-step explanation and allows partners to establish secure relationships for seamlessly sending and receiving documents using the Adeptia EDI Accelerator.

Pre-Requisite

It is assumed at this point that you have installed EDI Accelerator on your machine.

To install EDI Accelerator, you need to select the *EDI Accelerator* checkbox in the Configure Accelerator screen, while installing Adeptia Suite. For details, refer to the Adeptia Installation Guide.

This document is divided into the following sections:

2 TARGET AUDIENCE

This document is intended for all users of Adeptia Suite, who need to exchange EDI documents between partners using the EDI Accelerator.

3 OVERVIEW OF EDI ACCELERATOR

This chapter covers the following topics:

About EDI Accelerator

If two business entities need to exchange EDI data, they can seamlessly do it using the *EDI Accelerator*. These entities are referred to as Trading Partners of each other.

The EDI Accelerator enables you to configure new trading partners quickly via an easy-to-use interface. By using this interface you can setup inbound and outbound relationships with each trading partner in order to quickly respond to different EDI messages. For each trading partner, you can setup number of translation rules to process different incoming EDI messages and also to create the outbound EDI messages.

When EDI Accelerator receives data from one trading partner, you need to create an inbound relationship, wherein, it receives data from that trading partner and then processes it. In order to send data to the other trading partner, you need to create an outbound relationship, wherein, it receives data stored in the file system, processes it into a format compatible to the other trading partner and then sends it to that trading partner.

Architecture of EDI Accelerator

The architecture of EDI Accelerator is depicted in Figure 3.1.

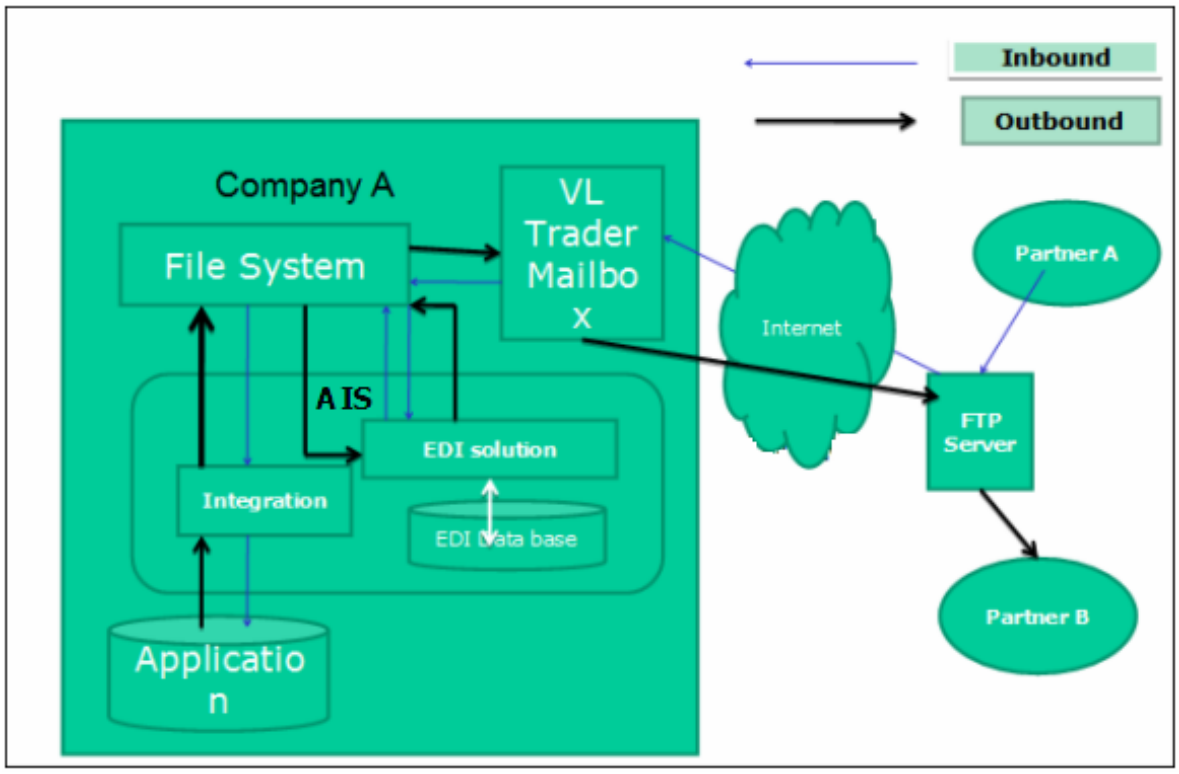

Figure 3.1: EDI ACCELERATOR Architecture

The EDI Accelerator supports direct exchange of data using *File* and *FTP* protocols. In a case, where the trading partner is using a protocol other than File or FTP, third-party software, namely *VL Trader Host* is used. This host will receive the data from the partner's protocol and send it to EDI Accelerator on a local file system or FTP location.

For inbound processing, VLTrader receives the data from any trading partner and download it into its configured mailbox. The EDI Accelerator picks the data file from the inbox folder of VL Trader mailbox and starts its inbound processing. It splits the file into transaction sets and inserts them into the EDI database. It now processes each transaction set one by one. Once this EDI translation is done, the translated data is placed in the File System. This data can now be sent to the back-end application using a process flow. Refer inbound flow in Figure 3.1

For outbound processing, EDI Accelerator picks the data from the File System (sent by the backend application using a process flow) and starts its outbound processing. It translates the data and splits it into different records, based on the Application ID (used to identify the Trading Partner for the specific data). Once it translates the outbound data, it puts it in the Outbound Queue. Transactions in this queue are processed when a batch schedule is run. Then, the EDI Accelerator picks these transactions and creates GS and ISA Envelopes for them and sends them to Partner using File or FTP protocol of Adeptia Suite. If VL Trader Host is being used, then they are sent to the outbox folder in VLTrader mailbox, from where they are sent to Partner.

Note: For more details about VL Trader, refer to VL Trader help.

Key terms used in EDI Accelerator

The key terms used in the EDI Accelerator are defined in the table below.

Table 3.1: Key Terms used in EDI Accelerator

Terms	Definition
Trading Partner	An EDI Trading Partner is an entity that has a business relationship with another entity to participate in an EDI transaction with predefined rules and EDI standards.
VL Trader	It is third-party communication software, which is used by EDI Accelerator, to send or receive data to or from trading partner. Currently, EDI Accelerator can send or receive data from a local file system or using FTP. If Trading Partner is unable to use these transport protocols, then you need to use VL Trader.
Inbound EDI Message	It is the data received from trading partner.
Outbound EDI Message	It is the data sent to the trading partner.
Inbound Relationship	It is used to define the rules for processing an inbound EDI message type.
Outbound Relationship	It is used to define the rules for processing an outbound EDI message type.
Communication Profile	It is used to define rules for receiving inbound messages and sending outbound messages.
ISA Envelope	It is used to define ISA definition for sending outbound messages to the partner.

Components of EDI Accelerator

Components of the EDI Accelerator are used to process data. They are outlined as:

- Process Flows
- Activities
- EDI X12 V 4010 Data Dictionary

These objects belong to *EDISolutionUser*. Default password of *EDISolutionUser* is *ediuser123.* You should not edit these components.

EDI Accelerator also has sample activities related to EDI (i.e. Trading Partner, Inbound and Outbound Relationship, Schema and Mapping etc). You can use these activities as guidelines

and make copies to create your own activities. These sample objects belong to ***EDIUser***. Default Password of ***EDIUser*** is ***ediuser123***.

4 CREATING A COMMUNICATION PROFILE

A Communication Profile is used to define rules to receive the inbound and send outbound files using Inbound and Outbound Events respectively. It is also used to define rules to batch the schedule for sending outbound files using Calendar Event.

One Communication Profile can be used by multiple Trading Partners.

This chapter describes the steps for creating a new Communication Profile. These are outlined as:

1. Creating an Inbound Event
2. Creating an Outbound Target
3. Creating an Outbound Batch Schedule
4. Creating a Communication Profile

Creating an Inbound Event

Inbound Event is used to locate the inbound EDI message and trigger its processing. The type of inbound event depends on the mechanism/protocol used for receiving inbound EDI messages. EDI Accelerator supports *File* or *FTP* protocols. In case of any other, you need to use the VL Trader Host.

This is used in the Communication Profile when you need to receive any inbound EDI message.

For details on creating a File/FTP event, refer to the *Adeptia Developer Guide.*

Creating an Outbound Target

Outbound Target is used to put the outbound EDI message to target using FTP or File System. The type of outbound event depends on the mechanism/protocol used for sending outbound EDI messages. EDI Accelerator supports *File* or *FTP* protocols. In case of any other, you need to use the VL Trader Host.

This is used in the Communication Profile when you need to send any outbound EDI message or Acknowledgement for an inbound message.

For details on creating a File/FTP target, refer to the *Adeptia Developer Guide*.

Creating an Outbound Batch Schedule

An Outbound Batch Schedule is used to define the schedule for the batch process that will send the outbound EDI message at defined intervals to the partner. This batch process picks the transaction set, adds their respective GS and ISA segments and sends it to the target. Calendar Event is used for this purpose. For details on creating a Calendar event, refer to the *Adeptia Developer Guide*.

This is used in the Communication Profile. This is used when you need to send any outbound EDI message or Acknowledgement for an inbound message.

You can also process the outbound messages in real time. To know how to enable real time processing of outbound messages, refer to Processing Outbound Messages in Real Time section.

Processing Outbound Messages in Real time

When real time processing of Outbound Message is enabled, outbound messages are sent immediately after the EDI translation. In this case outbound message are not queued in the outbound queue. Outbound message are immediately sent after the execution of *EDIOutboundProcess* process.

Steps to enable real time processing of outbound message:

1. Login with *admin* user.

	Default password of *admin* user in *indigo1*.

2. In the workspace menu, click **Design -> Process Flow.**
3. Click the *Process Flow* Link. The Manage Process Flow screen is displayed.
4. Select *EDIOutboundProcessor* and click *edit* link (see Figure 4.1).

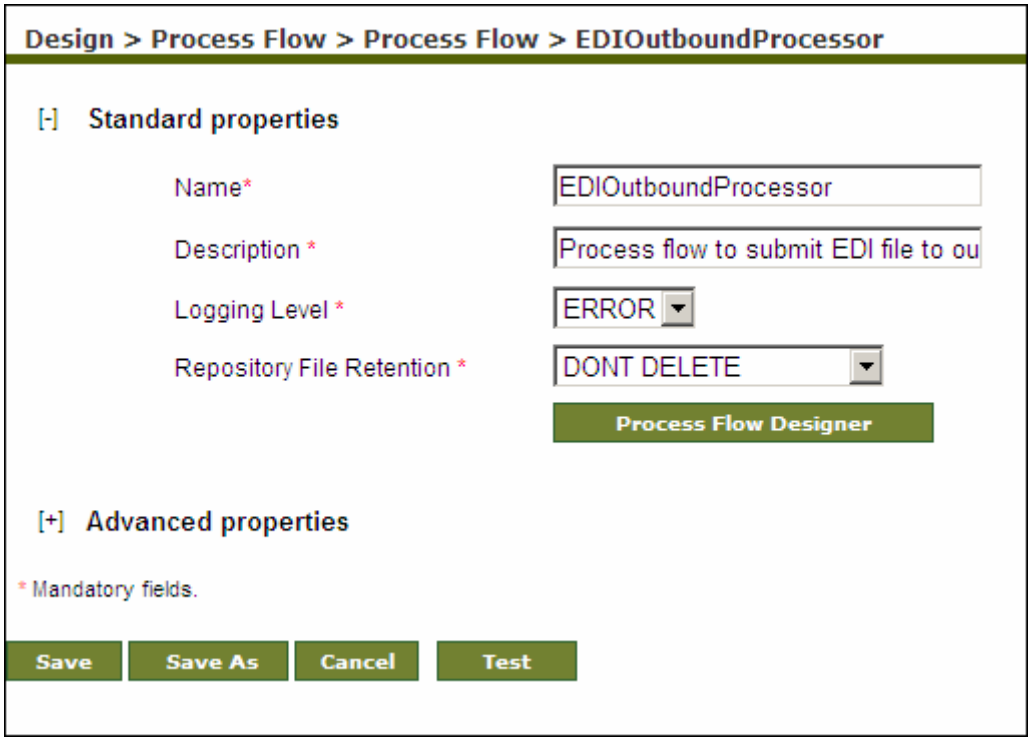

Figure 4.1: EDI Process Flow

5. Now click the *Process Designer* button. It opens the process flow in Process Designer.
6. In Process Designer, click *Process Flow Variable* tab (see Figure 4.2).

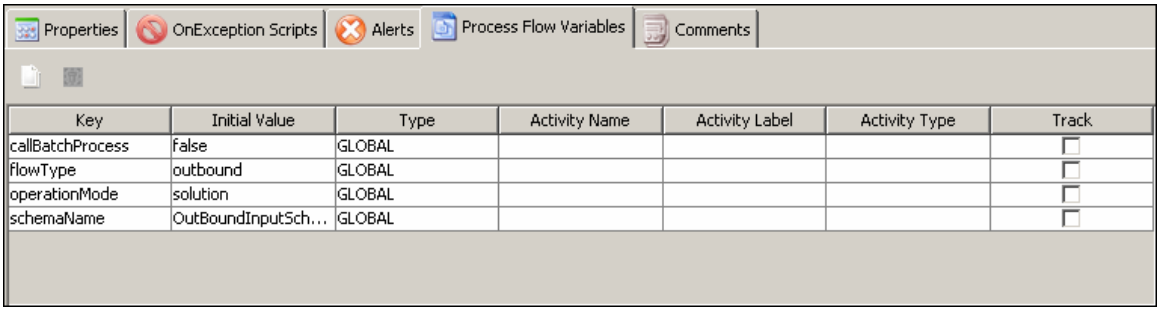

Figure 4.2: Process Flow Variables

7. Change the Initial Value of *callBatchProcess* key from *false* to *true.*
8. Save the Process Flow.

	You can either have real time processing enabled or you can use batch schedule to send outbound message. You can not use both the option at a time.

Creating a Communication Profile

Steps to create a Communication Profile:

1. In the Workspace menu, click **My Solutions -> EDI ->Trading Partner ->Communication Profile.** The Manage Communication Profile screen is displayed.
2. Click the **New** link. The Create Communication Profile screen is displayed. A sample Communication Profile screen is displayed below (see Figure 4.3)

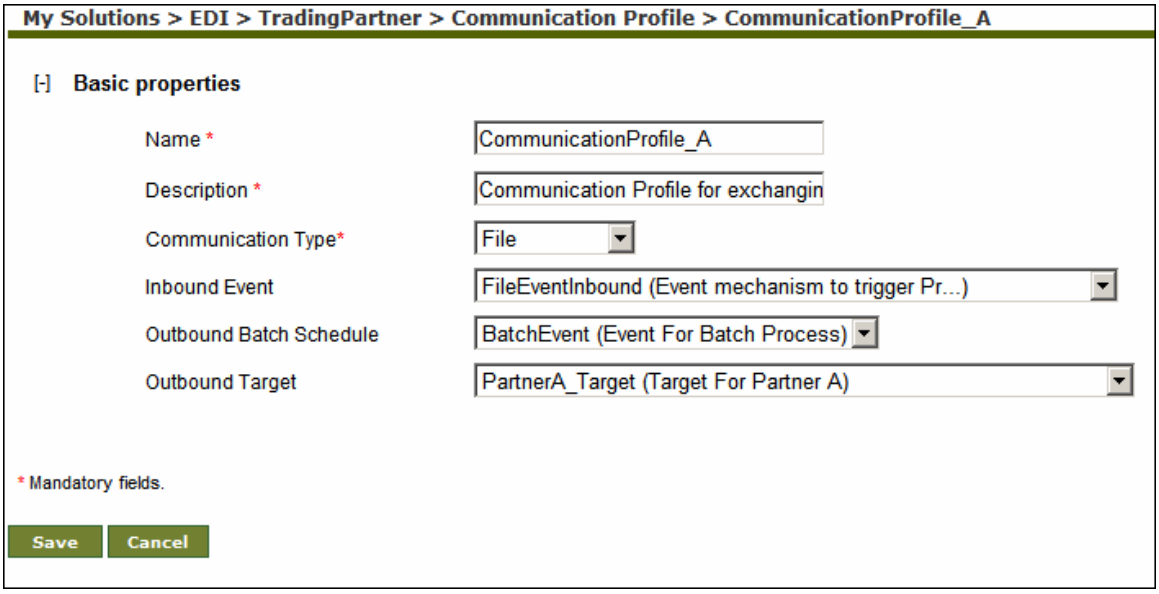

Figure 4.3: Communication Profile Sample

3. Enter the name and description for communication profile in *Name* and *Description* fields respectively.
4. Select the target activity type from the *Communication Type* drop-down list. It can either be *File* or *FTP*.
5. Select the event activity which is used to check for the file at a given location, from *Inbound Event* drop-down list.

	One Inbound Event can be used for only one Communication Profile.

6. Select the event which is used to execute the Batch Processor process flow from the *Output Batch Schedule* drop-down list. This could be a calendar event where you define the firing schedule to execute the Batch Processor.

	One Outbound Batch Schedule can be used for only one Communication Profile.

7. Select the target activity from the *Outbound Target* drop-down list. This target activity is used to define the location where the outbound file will be created.

8. Click **Save** button. This displays a screen confirming that the Communication Profile has been created successfully.

5 CREATING A NEW TRADING PARTNER

This chapter specifies the steps for creating a Trading Partner.

Steps to create an EDI Trading Partner activity:

1. In the Workspace menu, click **My Solutions -> EDI -> Trading Partner -> Trading Partner**. The Manage EDI Trading Partner screen is displayed.
2. Click the **New** link. The Create EDI Trading Partner screen is displayed. A sample EDI Trading Partner screen is displayed below (see Figure 5.1).

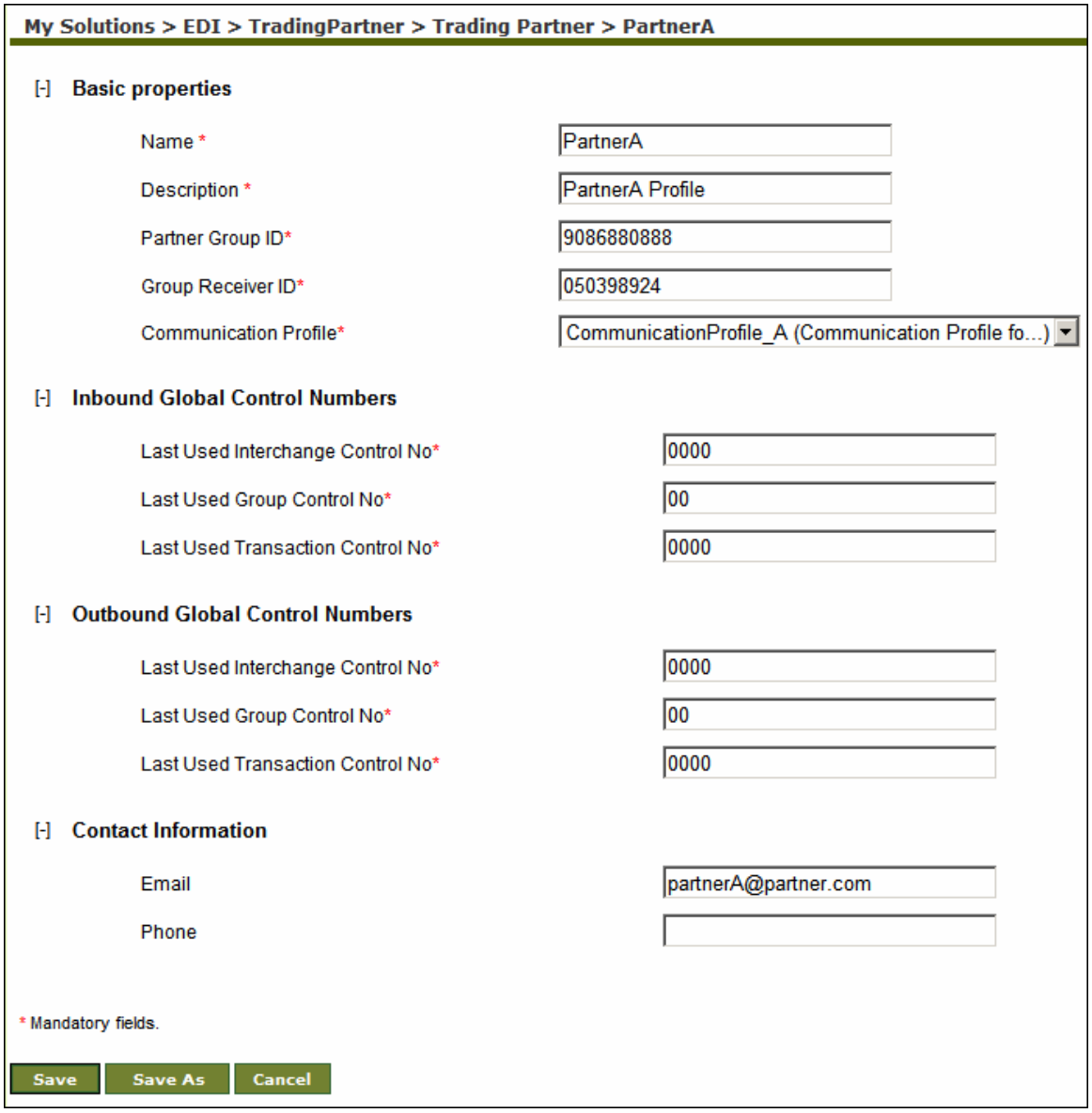

Figure 5.1: EDI Trading Partner Sample

3. Enter the name and description of the trading partner in the *Name* and *Description* fields.
4. Enter the partner group ID in the *Partner Group ID* field. This is a unique identifier for the partner.
5. Enter the group receiver ID in the G*roup Receiver ID* field. This is a unique identifier for your company.

	The *Partner Group ID* and *Group Receiver ID* combination between the trading partners is unique. When any inbound EDI message is received, then EDI Accelerator searches for EDI Trading Partner activity, which has same *Partner Group ID (GS02)* and *Group Receiver ID (GS03)* as defined in the incoming EDI file. The EDI Trading Partner which has same GS02 and GS03 is used to parse that file. If any EDI trading partner with matching combination is not found in EDI ACCELERATOR, it gives an error "No corresponding EDI Trading partner found".

6. Select the communication profile to be used to receive and send data to this trading partner, from the *Communication Profile* drop-down list.
7. Click **[+] Inbound Group Control Number** to expand the tree. All items under Inbound Group Control Number are displayed.
8. Enter Last Used Interchange Control Number, Last Used Group Control Number and Last Used Transaction Control Number in their respective fields. These control numbers are used to validate the control number of the inbound EDI messages.
9. Click **[+] Outbound Group Control No** to expand the tree. All items under Outbound Group Control No are displayed.
10. Enter Last Used Interchange Control Number, Last Used Group Control Number and Last Used Transaction Control Number in their respective fields. These control numbers are used to generate the control numbers in the outbound EDI messages.
11. Click **[+] Contact Information** to expand the tree. All items under Contact Information are displayed.
12. Enter the Email ID and Phone Number of the trading partner in their respective fields.

	If any translation error occurs during EDI processing, a mail notification is sent to the email address specified in the *Email* field of trading partner. For more details about EDI notification, refer to **Notification** section of this user guide.

13. Click **Save** button. This displays a screen confirming that the EDI Trading Partner activity has been created successfully.

6 CREATING EDI SCHEMA

This chapter covers the following topics:

Pre-requisites

- The EDI Data Dictionary containing standard definitions should be uploaded on the system and all its objects should be available to users. For details, refer to the Creating EDI Data Dictionary section.

Creating EDI Data Dictionary

When creating EDI Schemas, some record definitions may be common across schemas. You can create and define the record definitions that are commonly used in EDI schemas, in an EDI Data Dictionary. Thus, when creating an EDI Schema, you can select the EDI Data Dictionary and display the required records.

Steps to create EDI Data Dictionary:

1. In the Workspace menu, click **Design -> Services -> Data Dictionary -> EDI**. The Manage EDI Data Dictionary screen is displayed.
2. Click the **New** link. The Create EDI Data Dictionary screen is displayed. A sample EDI Data Dictionary screen is displayed below (see Figure 6.1).

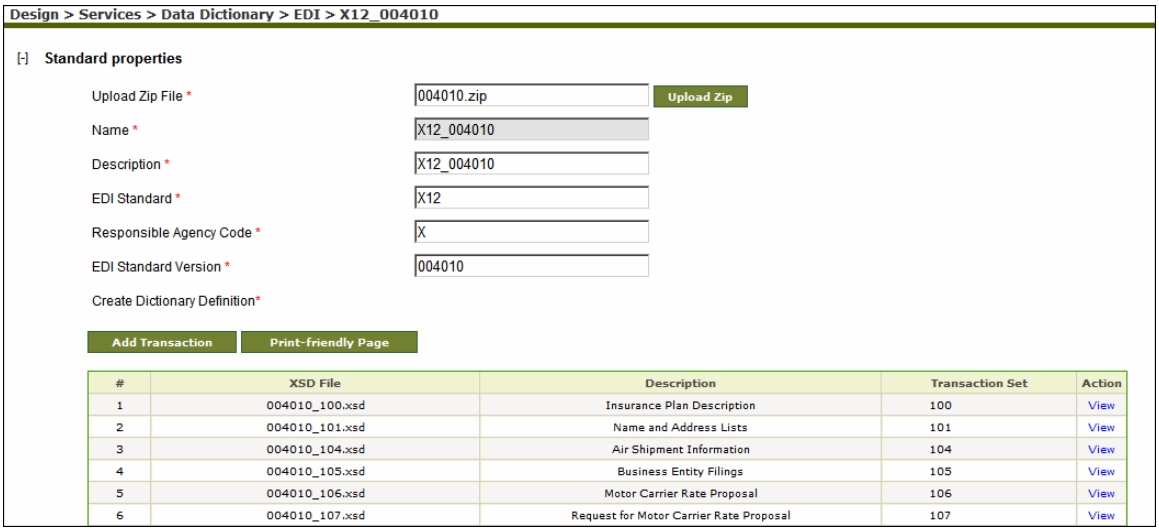

Figure 6.1: EDI Data Dictionary Sample

3. Click **Upload Zip** button to select and upload the zip file. All XSD's and the values contained in the zip file are uploaded automatically. All the fields of the data dictionary are populated automatically. You need not enter or change any value in these fields.

- Currently one data dictionary is already created for X12 004010 Version.
- To create the EDI Data Dictionary of any other version, the ZIP will be provided by Adeptia. To get the XSD's of any other version contact support@adeptia.com .

4. Click the **Save** button. This displays a screen confirming that the Data dictionary has been created successfully.

Creating EDI Schema

EDI Schema is used to define the layout of an EDI Message.

Steps to create EDI Schema:

1. In the Workspace menu, click **Design -> Services -> Schema -> EDI**. The Manage EDI Schema screen is displayed.
2. Click the **New** link. The Create EDI Schema screen is displayed. A sample EDI Schema screen is displayed below (see Figure 6.2).

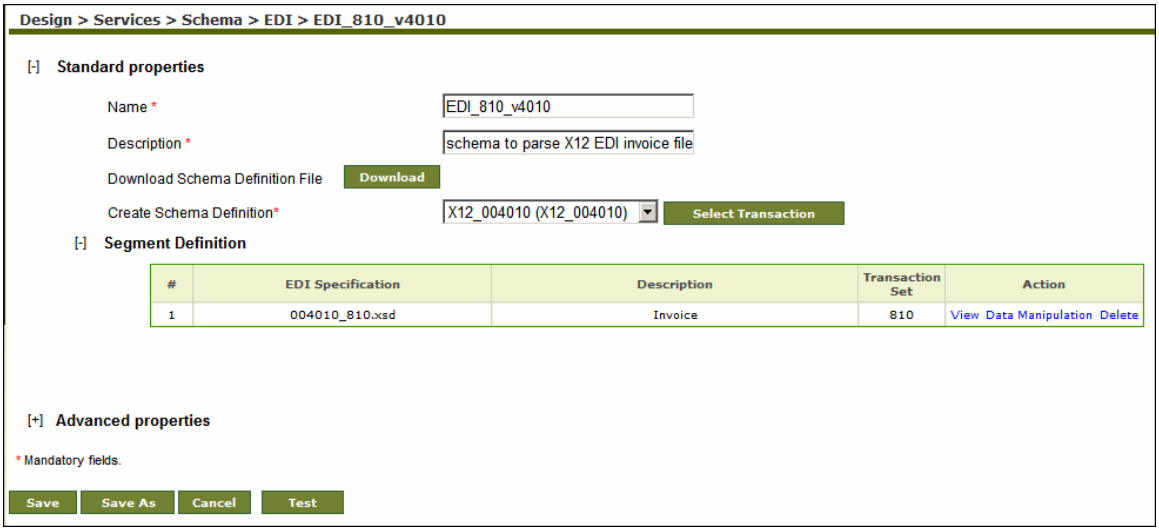

Figure 6.2: EDI Schema Sample

3. Enter the name and the description of EDI Schema in *Name* and *Description* fields respectively.
4. To download an existing schema definition file, click **Download** button. Alternately, to create a new schema definition, select an EDI Data Dictionary from the *Create Schema Definition* drop-down list.

5. Click **Select Transaction** button, and select the required EDI transaction.
6. Click **OK** to close the Select EDI Transaction screen.
7. Click **Save** button. This displays a screen confirming that the EDI Schema has been created successfully.

7 CONFIGURING AN INBOUND MESSAGE PROCESSING

This chapter covers the following topics:

Pre-requisites

- Trading Partner should be created. For details, refer to Creating an EDI Trading Partner section.
- The EDI Data Dictionary containing standard definitions should be uploaded on the system and all its objects should be available to users. For details, refer to Creating EDI Data Dictionary section.

Configuring Source Schema

The source schema (EDI schema) defines the layout of EDI message and is used to parse the inbound EDI message as per EDI Message Standards. For details, refer to Creating EDI Schema section.

Configuring Target Schema

Target schema defines the layout of the output data file that you want to generate from inbound EDI message and is used to create output data file. For example, if you want to convert the inbound EDI message into positional format, then you have to create positional schema. For details on creating a target schema, refer to the *Adeptia Developer Guide.*

Configuring Mapping

Mapping is used to map the fields of inbound EDI message to the fields of target data. For details on creating a mapping activity, refer to the *Adeptia Developer Guide.*

Configuring Target

The target (File or FTP) is used to place the translated EDI Message in its defined location. The type of target depends on protocol you are using to place the translated EDI Message. For details on creating a target activity, refer to the *Adeptia Developer Guide.*

Creating Inbound Relationship

Inbound relationship is used to define the rules for processing an inbound EDI message. An inbound relationship is created for each inbound message type for that partner. For example if you are receiving two message types say 810 and 850, then you need create one inbound relationship for 810 and another for 850.

Steps to create Inbound Relationship:

1. In the Workspace menu, click **My Solutions -> EDI -> Trading Partner -> Trading Partner**. The Manage EDI Trading Partner screen is displayed.
2. Select the EDI Trading Partner activity for which you want to define the inbound relationship and click **InboundRelationship** link. The Manage Inbound Relationship screen is displayed.
3. Click the **New** link. The Create Inbound Relationship screen is displayed. A sample Inbound Relationship screen is displayed below (see Figure 7.1).

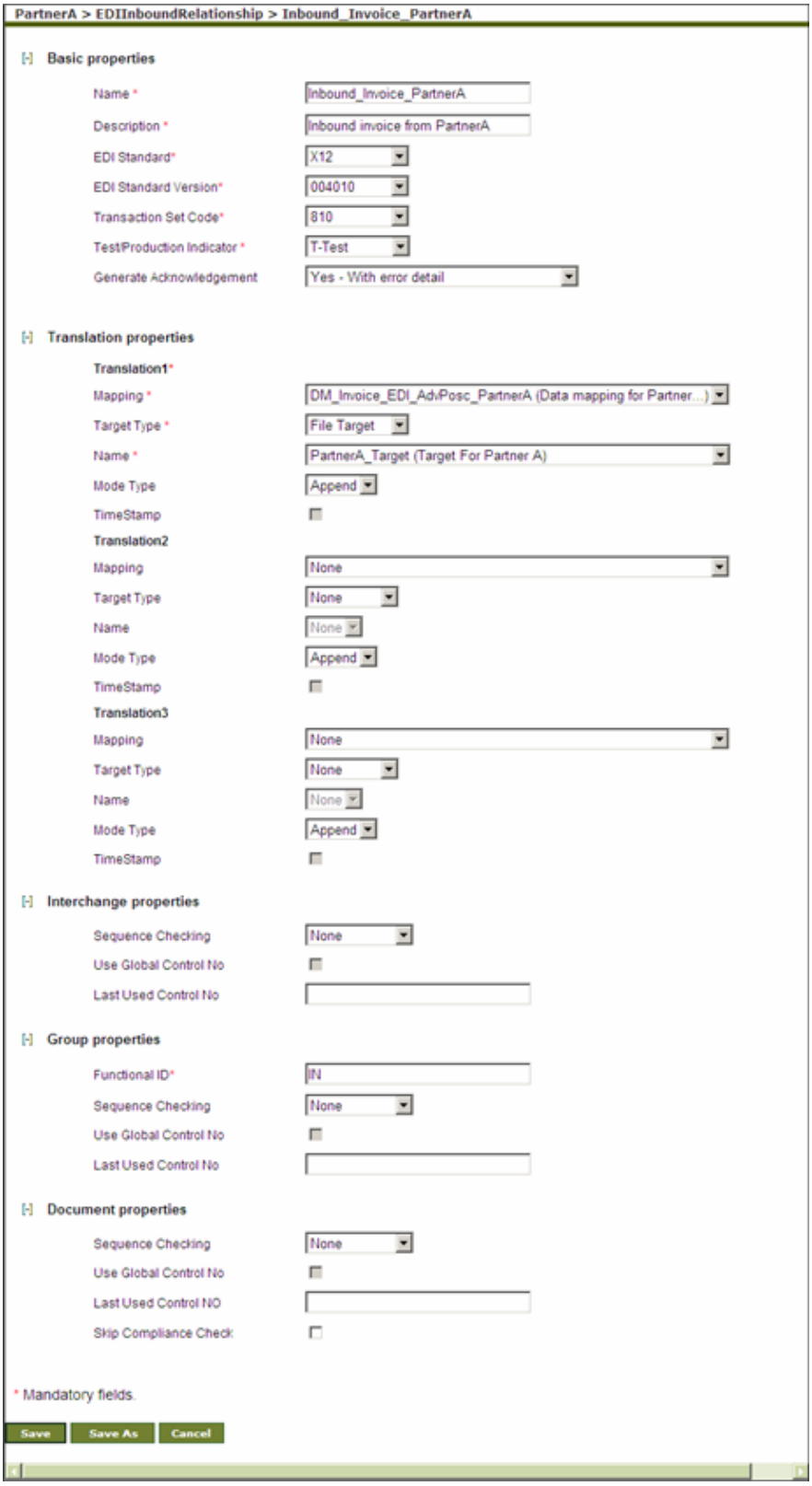

Figure 7.1: Inbound Relationship Sample

4. Enter the name and description for the Inbound relationship in the *Name* and *Description* fields respectively.
5. Select the following values in their respective fields:
   - EDI Standard
   - EDI Standard Version
   - Transaction Set Code
   - Test/Production Indicator

This *EDI Standard, EDI Standard Version, Transaction Set Code* and *Test/Production Indicator* combination is unique for an inbound relationship. When you receive an inbound message, this combination is used to lookup the inbound relationship for that message.

6. Select *Yes* or *No* from the *Generate Acknowledgement* drop-down list, to state if you want to receive acknowledgement for the sent inbound message.
7. Click **[+]** to expand **Translation properties** tree. All translation properties are displayed.
8. Select the mapping activity that you want to use, when this inbound relationship is used to parse the inbound EDI Message, from the *Mapping* drop-down list.
9. Select the type and the name of the target activity from the *Target Type* and *Name* drop-down lists respectively.
10. By default all the records are appended in the same target file. In case you want to create a new target file for each input file then select *Create* from the *Mode Type* drop-down list.
11. Incase you have selected *Create* in *Mode Type* drop down list, then you should check *TimeStamp* checkbox. This feature appends the date and time stamp in the name of file created. If you do no check *TimeStamp* checkbox, the target file will be overwritten every time a new input file is processed.

In case you have selected *FTP Target* in *Target Type* drop-down list, then at target always a new file is created from every input file.

You can define three translations in one inbound relationship.

12. Click **[+] Interchange properties** to expand tree. All interchanges properties are displayed.
13. Select type of sequence checking from *Sequence Checking* drop-down list. Types of sequence checking supported by EDI ACCELERATOR and their descriptions are given in the Table 7.1.

Table 7.1: Types of Sequence Checking and their description

Sequence Checking Type	Description
No Sequence Checking	No Sequence checking is done on control number.
Duplicate	If *Sequence Checking* is selected as *Duplicate* and the inbound document contains duplicate control number, then that inbound message is not processed and error message is generated

	in EDI Interchange inbound log.
Incremental	If *Sequence Checking* is selected as *Incremental* then control numbers of inbound messages should be in incremental order. In case control number of any message in not in incremental order then the message is processed but a warning message is generated in EDI Interchange Inbound Log.
Chronological	Chronological Sequence means that control should be greater than the previous control number. If *Sequence Checking* is selected as *Chronological* then control numbers of inbound messages should be in Chronological order. In case control number of any message in not in chronological order then the message is processed but a warning message is generated in the EDI Interchange Inbound Log.

14. Check the *Use Global Control No* checkbox if you want to use interchange control numbers defined in the trading partner activity of this inbound relationship. Alternately, if you want to use interchange control number defined in the inbound relationship, then keep this checkbox unchecked.
15. Enter the last used control number in *Last Used Control Number* field.
16. Click **[+] Group properties** to expand the tree. All group properties are displayed.
17. Functional ID is automatically populated based on Transaction Set Code that you have selected.
18. Define the sequence checking and control numbers in the similar way as defined in the *Interchange Property.*
19. Similarly expand the **Document Properties** and define the type of *Sequence Checking* and *Last used control number*.
20. Check the *Skip Compliance Check* checkbox if you want to skip compliance check for this document.
21. Click **Save** button. This displays a screen conforming that the Inbound Relationship has been created successfully.

Creating Outbound Relationship for Acknowledgement

The outbound relationship is used to process any outbound EDI message. To send an Acknowledgement (997), you need to create an outbound relationship. For details, refer to the Creating an Outbound Relationship section.

8 CONFIGURING AN OUTBOUND MESSAGE PROCESSING

This chapter covers the following topics:

Pre-requisites

- Trading Partner should be created. For details, refer to Creating an EDI Trading Partner section.
- The EDI Data Dictionary containing standard definitions should be uploaded on the system and all its objects should be available to users. For details, refer to Creating EDI Data Dictionary section.

Configuring Source Event

The source event (File or FTP) is used to look for the file that needs to be translated and sent as outbound message. For details on creating a File or FTP event, refer to the *Adeptia Developer Guide.*

Configuring Source Schema

The source schema defines the layout of outbound data that need to be translated into EDI message, and is used to parse it. For details on creating a schema, refer to the *Adeptia Developer Guide.*

Configuring Outbound Data Source

Outbound Data Source defines the Source Event and Source Schema to be used to parse the outbound data. This is also used to define the field which is to be used as *Application ID* and *Data Type*.

Steps to create EDI Outbound Data Source:

1. In the Workspace menu, click **My Solutions -> EDI -> Trading Partner -> Outbound Data Source**. The Manage Outbound Data Source screen is displayed.

2. Click the **New** link. The Create Outbound Data Source screen is displayed. A sample Outbound Data Source screen is displayed below (see Figure 8.1).

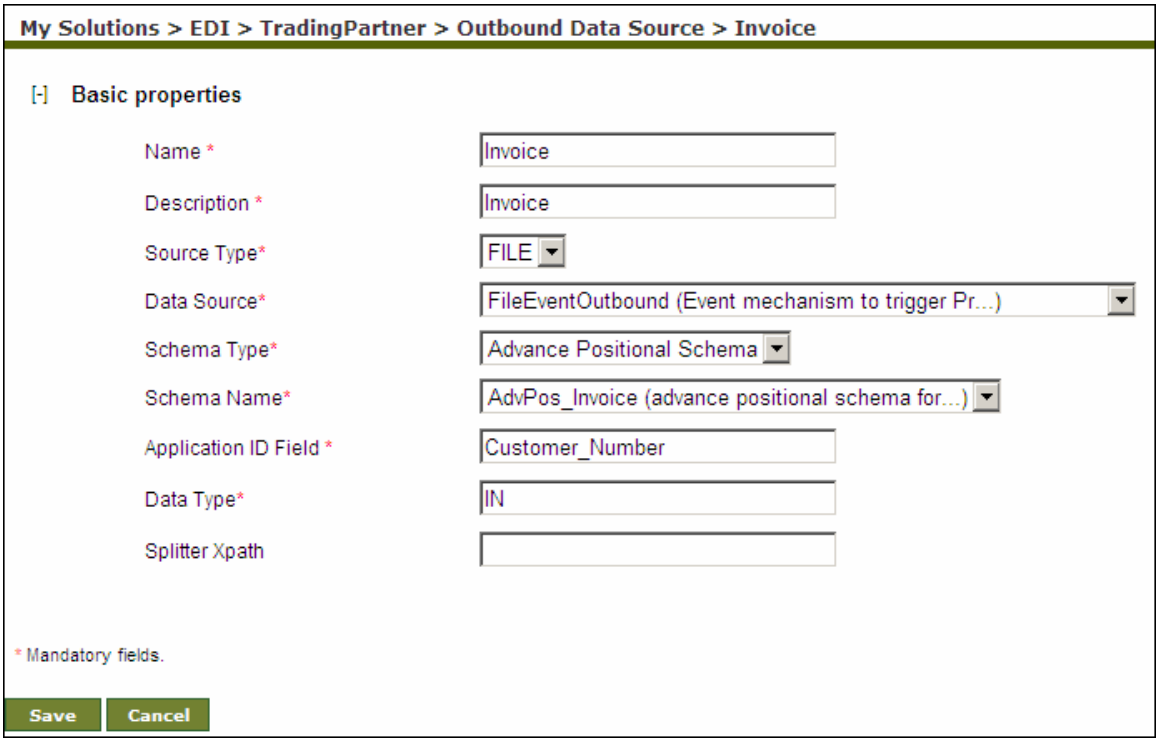

Figure 8.1: Outbound Data Source Sample

3. Enter and description for outbound data source activity in the *Name and Description* fields respectively.
4. Select the type of event which will be used to trigger the outbound flow, from the *Source Type* drop-down list. It could be *File* or *FTP.*
5. Select the event activity from *Data Source* drop-down list.
6. Select the type of schema and schema name that will be used to parse the outbound message, from the *Schema Type* and *Schema Name* drop-down list.
7. *Application Id Field* is used to determine the trading partner who will receive the EDI Message. In this field, you can enter:

   - Name of the field of input data file (used for outbound processing), in case the input file has records going to different trading partner. This field should have a unique value across all the records in an input file that are sent to same trading partner.

   OR

   - "Data Source'' in case input file has all the records going to same trading partner.

	In case you have entered name of the field of input data file, then value of this Field (of Input data file) should be specified in the *Application Id* of Outbound Relationship of the trading partner which will receive the data. In case you have entered "Data Source" in this field, then you need to enter the ID of Event activity which is used to look up the input file for outbound

	processing.

8. Enter the type EDI message which will be sent, in the *Data Type* field. For example, for INVOICE enter IN.
9. In case the source file has multiple roots, then you can define the XPath of the root that has message data, in the *Splitter Xpath field*.

	*Splitter XPath* is applicable only when the source data has messages that are destined for multiple partner.

10. Click **Save** button. This displays a screen confirming that the Outbound Data Source has been created successfully.

Define Splitter Xpath:

To understand how define Splitter Xpath, let's take an example of the XML file given below:

```
<Root>
  <Header>
    <orderNumber>123</orderNumber>
    <orderDescription>order</orderDescription>
     <partnerID>12345</partnerID>
  </Header>
  <Detail>
        <itemname></itemname>
    <deliverydate>12-12-2010</deliverydate>
    <communicationAddress>chicago</communicationAddress>
  </Detail>
  <Detail>
        <deliverydate>12-12-2010</deliverydate>
        <communicationAddress>chicago</communicationAddress>
  </Detail>
  <Trailer>
        <lineitemcount></lineitemcount>
        <totalamount></totlmount>
  </Trailer>
</Root>
```

As you can see in the above example, there are three root level element: Header, Detail and Trailer. The *Detail* is the repeating record here. where as Header and Trailer are common. We shall consider *Root/Detail* as splitterXpath.

Configuring Target Schema

This target schema (EDI) defines the layout of the output EDI file that you want to generate from outbound data. For details on creating an EDI schema, refer to Creating EDI Schema section.

Configuring Mapping

Mapping is used to map the fields of outbound data to the fields of EDI message. For details on creating a mapping activity, refer to the *Adeptia Developer Guide.*

Creating Outbound Relationship

The outbound relationship is used to define the rules for processing an outbound EDI message. An outbound relationship is created for each outbound message type for that partner. For example if you are sending two message types say 810 and 850, then you need to create one outbound relationship for 810 and another for 850.

Steps to create Outbound Relationship:

1. In the Workspace menu, click **My Solutions -> EDI -> Trading Partner -> Trading Partner**. The Manage EDI Trading Partner screen is displayed.
2. Select the EDI Trading Partner activity for which you want to define the outbound relationship and click **OutboundRelationship** link. The Manage Outbound Relationship screen is displayed.
3. Click the **New** link. The Create Outbound Relationship screen is displayed. A sample Outbound Relationship screen is displayed below (see Figure 8.2).

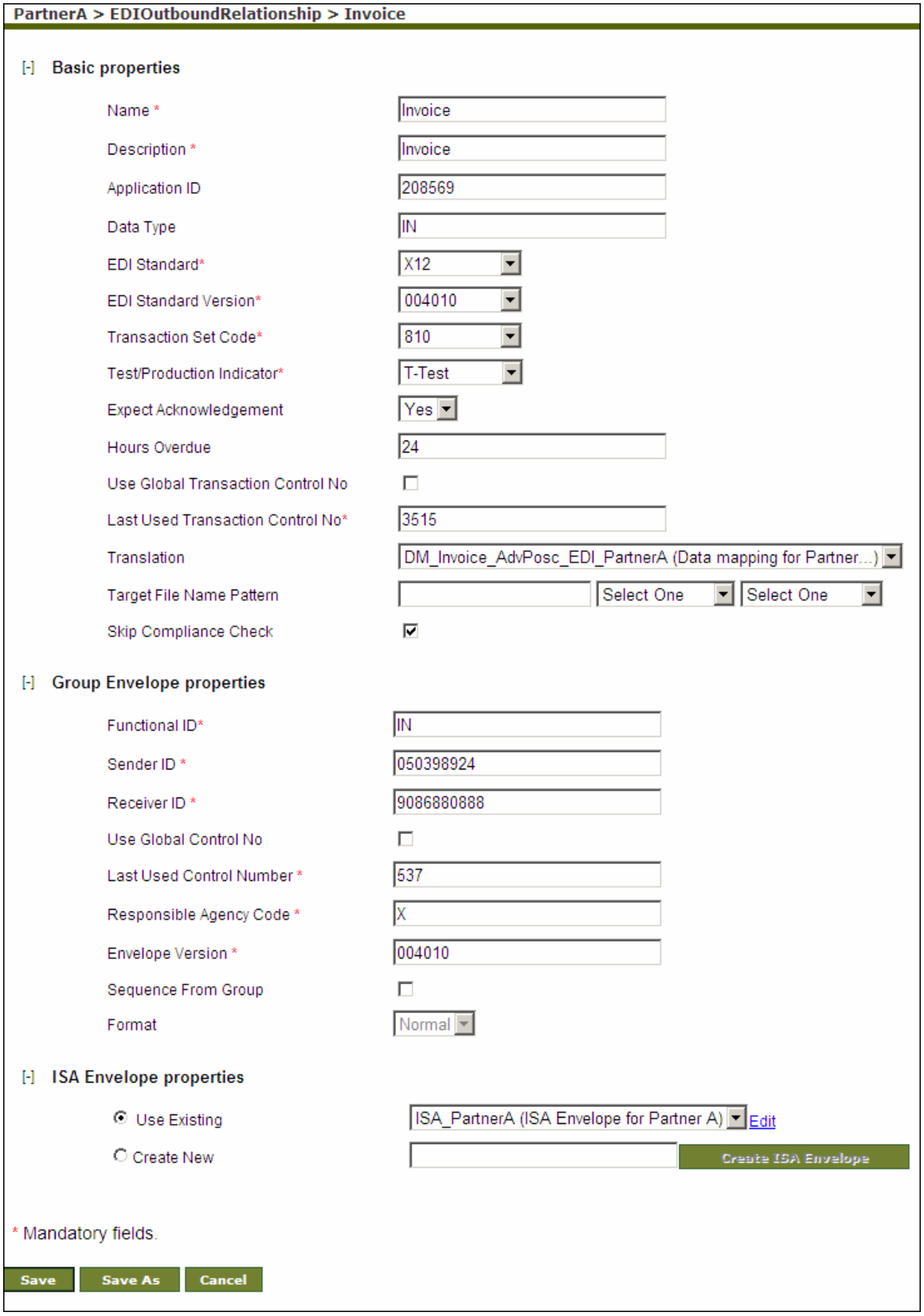
PartnerA > EDIOutboundRelationship > Invoice
[-] Basic properties
Name *
Invoice
Description *
Invoice
Application ID
208569
Data Type
IN
EDI Standard*
X12
EDI Standard Version*
004010
Transaction Set Code*
810
Test/Production Indicator*
T-Test
Expect Acknowledgement
Yes
Hours Overdue
24
Use Global Transaction Control No
Last Used Transaction Control No*
3515
Translation
DM_Invoice_AdvPosc_EDI_PartnerA (Data mapping for Partner...)
Target File Name Pattern
Select One
Select One
Skip Compliance Check
[-] Group Envelope properties
Functional ID*
IN
Sender ID *
050398924
Receiver ID *
9086880888
Use Global Control No
Last Used Control Number *
537
Responsible Agency Code *
X
Envelope Version *
004010
Sequence From Group
Format
Normal
[-] ISA Envelope properties
Use Existing
ISA_PartnerA (ISA Envelope for Partner A)
Edit
Create New
Create ISA Envelope
* Mandatory fields.
Save
Save As
Cancel

Figure 8.2: Outbound Relationship Sample

4. Enter the name and description for the Outbound Relationship in the *Name* and *Description* fields respectively.
5. Depending on the value specified in the *Application Id Field* of Outbound Data Source, activity, enter the value of the input data field or event activity id, in *Application ID*. (Refer to Outbound Data source)
6. Enter the type of message that will be sent using this outbound relationship in the *Data Type* field. This should be same as defined in the Outbound Data Source.
7. Select the following values in the respective fields:
   - EDI Standard
   - EDI Standard Version
   - Transaction Set Code
   - Test/Production Indicator

Combination of *Application Id, EDI Standard, EDI Standard Version, Transaction Set Code,* and *Test/Production Indicator* must be unique in each outbound relationship.

8. Select *Yes* or *No* from the *Expect Acknowledgement* drop-down list, to state if you want to receive acknowledgement for the sent message.
9. Enter how many hours must elapse before an expected functional acknowledgment is considered as overdue in the *Hours Overdue* field.
10. Check *Use Global Transaction Control No* checkbox if you want to use the control number defined in the trading partner activity of this Outbound Relationship. If you want to use the control number defined in the outbound relationship, then keep this checkbox unchecked.
11. Enter the last used transaction control number in the *Last used Transaction Control number* field.
12. Select the mapping activity which you want to use for this outbound relationship, in the *Translation* drop-down list.

Application ID, Data Type and *Translation* are not required if you are creating an outbound relationship for sending an acknowledgement.

13. If you want define the pattern of target file name, then enter the required text in *Target File Name Pattern* field and select the date and time format from the drop down lists. For example if you want the name of the target file similar to *OutboundTarget_<MessageType>_<Date>_<Time>.edi* then you need to enter *OutboundTarget* in the text box and select date and time format from the respective drop-down list.

Here

<Date> is the date when output file is created.

<Time> is the time when output file is created.

<MessageType> is the message type of the EDI outbound message and it is automatically populated based on the message type. For example for invoice message type it will be IN.

When *Target File Name Pattern* is defined

- Separate files are created for each message type. For example there are two outbound EDI messages (810 and 997) for the same trading partner, then two files are created. One for 810 and another for 997.
- Extension of file is .edi.

When *Target File Name Pattern* is not defined:

- Only one output file is created for all outbound messages of the same trading partner. For example there are two outbound messages (810 and 997) for the same trading partner and *Target File Name Pattern* is not defined in both the outbound relationship, then both the messages are written in same output file.
- The file name of output file will be same as defined in File/FTP Target activity selected in communication profile of that trading partner.

14. Click **[+] Group Envelope properties** to expand tree. All group envelop properties are displayed.
15. *Functional ID* is automatically populated based on Transaction Set Code that you have selected.
16. Enter the Sender and Receiver ID values in the *Sender ID* and *Receiver ID* fields respectively.
17. Check *Use Global Control No* checkbox if you want to use the group control number defined in the trading partner activity of this outbound relationship. Alternately, if you want to use interchange control number defined in the inbound relationship, then keep this checkbox unchecked.
18. Enter the last used group control number in the *Last Used Control Number* field.
19. *Responsible Agency Code* and *Envelope Version* fields are automatically populated.
20. Check the *Sequence from Group* checkbox, if you want to follow the same sequence of the group.
21. Select the format of the control number from *Format* drop-down list.
22. Click **[+] ISA Envelope properties** to expand the tree. All ISA Envelope properties are displayed.
23. If you want to use an existing ISA outbound envelope, select the *Use Existing* radio button and then select the required ISA outbound envelope from the drop-down list.
24. If you want to use a new ISA outbound envelope, select the *Create New* radio button and click *Create ISA Envelope* button. The *Create EDI ISA Outbound Envelope* screen is displayed. To know how to create the ISA outbound envelope activity; refer to Creating ISA Outbound Envelope section.

25. Click **Save** button. This displays a screen conforming that the Outbound Relationship has been created successfully.

Creating Inbound Relationship for Reconciling Acknowledgement

The inbound relationship is used to process any inbound EDI message. To receive 997 of the outbound EDI message, an inbound relationship has to be created. For details on creating an inbound relationship, refer to Creating Inbound Relationship section.

Creating ISA Outbound Envelope

You need to create an ISA Outbound Envelope. This is used to define the values and control number of ISA header which is generated in the outbound file. It can be created either from the *Manage Trading Partner* page or from the *Create Outbound Relationship* page.

Steps to create ISA Outbound Envelope:

1. In the Workspace menu, click **My Solutions -> EDI -> Trading Partner -> Trading Partner**. The Manage EDI Trading Partner screen is displayed.
2. Select the EDI Trading Partner activity for which you want to define the ISA Outbound envelope and click **ISAOutboundEnvelope** link. The Manage ISA Outbound Envelope screen is displayed.
3. Click the **New** link. The Create ISA Outbound Envelope screen is displayed. A sample ISA Outbound Envelope screen is displayed below (see Figure 8.3).

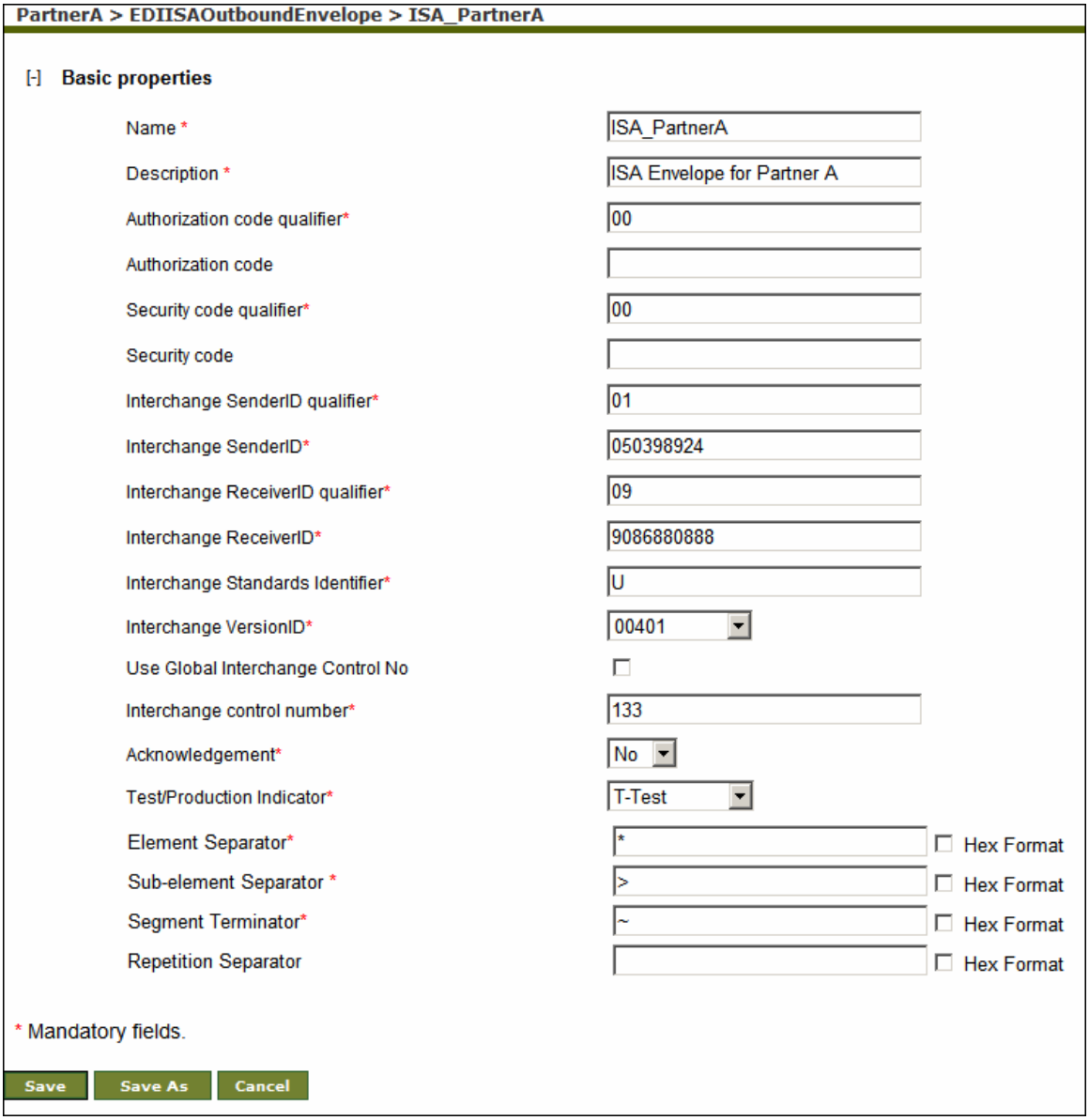

Figure 8.3: Outbound ISA Envelope Sample

4. Enter the name and description for the ISA Outbound Envelope activity in *Name* and *Description* fields respectively.
5. Enter the authorization code in *Authorization code qualifier* field.
6. Enter the authorization code in *Authorization code* field.
7. Enter the security code in *Security code qualifier* field.
8. Enter the security code in *Security code* field.
9. Enter the Interchange Sender ID Qualifier in *Interchange SenderID Qualifier* field.
10. Enter the Interchange Sender ID in *Interchange SenderID* field.
11. Enter the Interchange Receiver ID Qualifier in *Interchange ReceiverID Qualifier* field.
12. Enter the Interchange Receiver ID in *Interchange ReceiverID* field.

13. Enter the Interchange standards identifier in *Interchange Standards Identifier* field.
14. Enter the Interchange VersionID in *Interchange VersionID* field.
15. Check *Use Global Interchange Control No* checkbox if you want to use the interchange control number defined in the outbound trading partner of this ISA outbound envelope activity. If you want to use interchange control number defined in the inbound relationship, then keep this checkbox unchecked.
16. Select *Yes* or *No* from the *Acknowledgement* drop-down list, to state if you want to receive acknowledgement for the sent message.
17. Select the test production indicator from the *Test/Production Indicator* drop-down list.
18. Enter the required separator in *Element Separator, Sub-element Separator, Segment Terminator* and *Repetition Separator* fields. These separators are used while creating the outbound data or acknowledgement.
19. Click **Save** button. This displays a screen confirming that the ISA Outbound Envelope has been created successfully.

9 VIEWING EDI LOGS

EDI Accelerator provides logs to view detail of EDI translation at run time. These logs are described in this chapter.

This chapter covers the following topics:

EDI Interchange Log

EDI Interchange log is used to track the interchange messages that are coming in and going out.

Steps to view the EDI Interchange Log:

1. In the Workspace menu, click **My Solutions -> EDI -> Logs -> EDI Interchange Log**. The EDI Interchange/Group Log screen is displayed. You can view the inbound and outbound logs from this screen (see Figure 9.1).

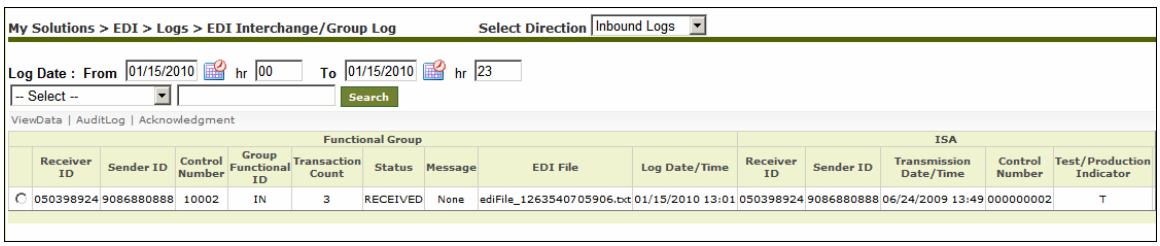

Figure 9.1: View EDI Interchange Log

2. From the *Select Direction* drop-down list, select whether you want to view logs for inbound messages or outbound messages.
3. Enter the start date and start time in *From* and *hr* field respectively.
4. Enter the end date and end time in *To* and hr field respectively.

	Click **Calendar** icon to select the *Start Date* and *End date* from calendar.

5. Click **Search** to view the logs of given time interval. The interchange log of the selected time interval is displayed (see Figure 9.2).

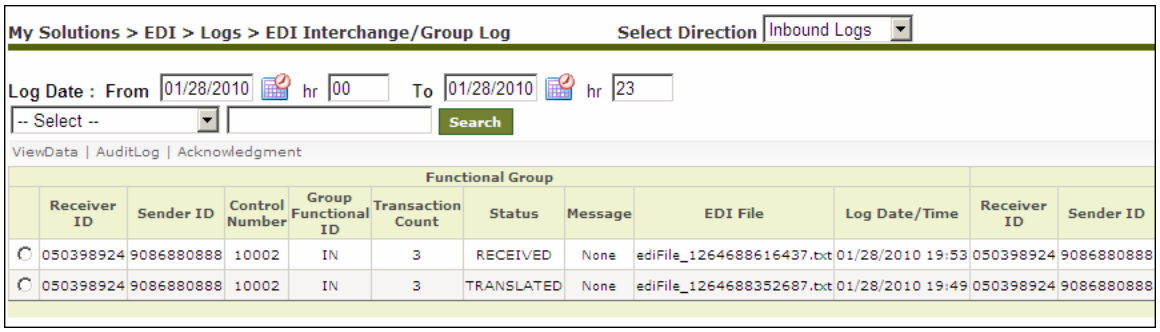

Figure 9.2: View EDI Inbound Interchange Log

	To search the interchange log based on Group Receiver ID, Group Sender ID, Control number and Status etc, select the search criteria from the *Select* drop-list and enter the search value in the field adjacent to it. Now click Search.

Following table lists the status of the interchange and their description:

Table 9.1: Types of Sequence Checking and their description

Status	Description
Inbound	
Received	Message has been received.
Translated	Message has been translated. To view if all the transaction sets are successfully translated or few had some error, click *View Data* link.
Reconciled	Acknowledgment has been reconciled.
Error	Some error has been encountered and message is not translated.
Outbound	
Queued	Message is queued in the outbound queue.
Sent	All the transaction set of the message has been sent successfully.
Partially Sent	Some transaction set of the message have been sent and some transaction set has not been

	sent due to some error.
Not Sent	All the transaction sets of the message have not been sent due to some error.
Error	

6. To view the transaction set of any message, select the message and click *ViewData* link. All the transaction sets of the selected message are displayed (see Figure 9.3).

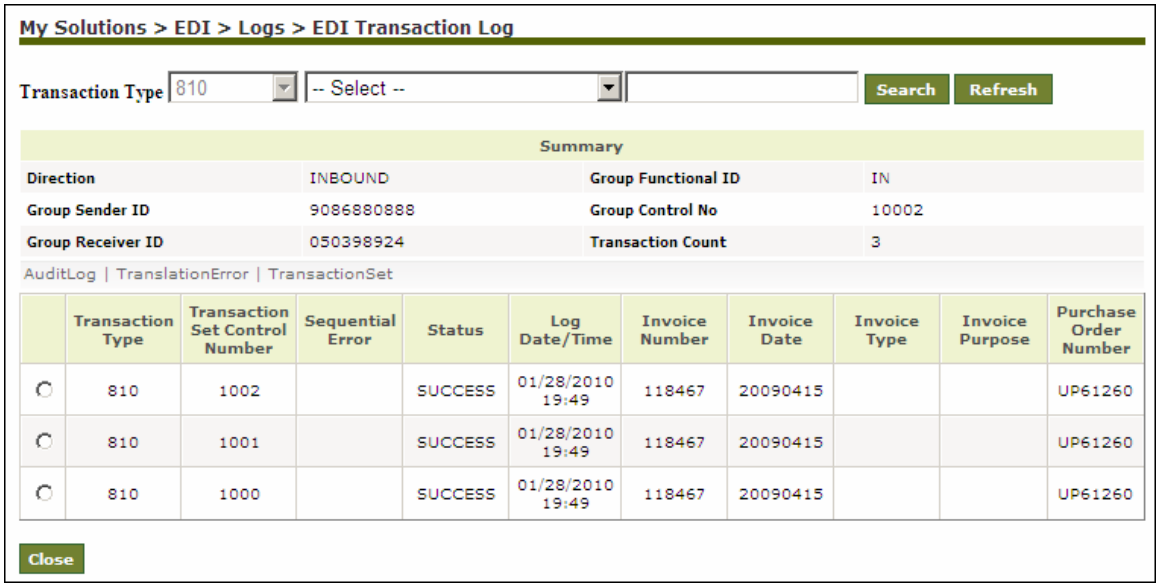

Figure 9.3: View EDI Transaction Log

For detailed information about EDI Transaction Log, refer to EDI Transaction Log section.

7. To view detailed log of the process flow instance which is executed to process any particular message, select the message in the EDI Interchange Log page and click *Audit Log*. Detailed Process Flow log is displayed for the particular process flow instance which is executed to process the selected message (see Figure 9.4).

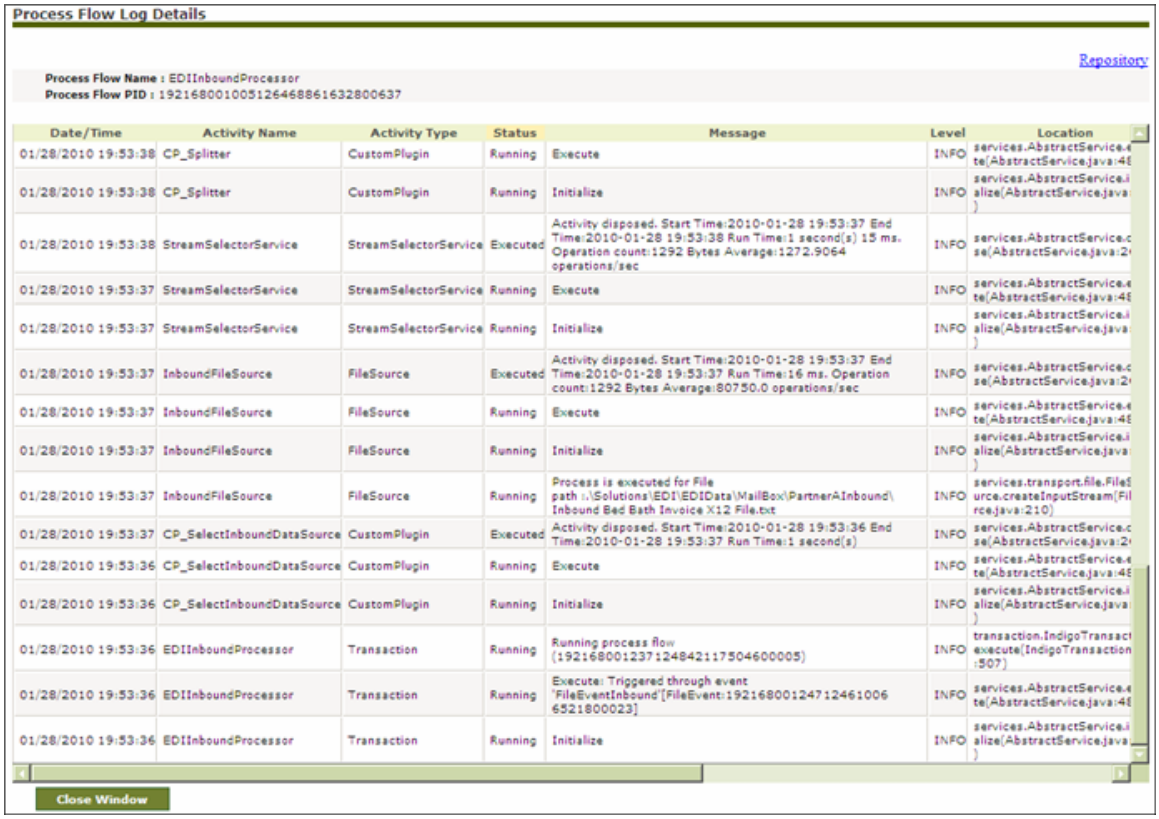

Figure 9.4: View Process Flow Log

	Process Flow log is helpful in case any EDI message is not processed properly.

8. To view the acknowledgment generated for any message, select the message in the EDI Interchange Log page and click *Acknowledgment*. Acknowledgment of the select message is displayed (see Figure 9.5)

Figure 9.5: View Acknowledgment Details

	Acknowledgment details screen displays the acknowledgment as well as its status. If the acknowledgment is sent to the trading partner, then the *Message Status* is displayed as *COMPLETED*. If the acknowledgment is

	queued in the outbound queue, then a message is displayed that "Acknowledgment is not transmitted".

EDI Transaction Log

EDI transaction log is used to track EDI transaction sets that are coming in and going out.

Steps to view the EDI Transaction Log:

1. In the Workspace menu, click **My Solutions -> EDI -> Logs -> EDI Transaction Log**. The EDI Transaction Log screen is displayed (see Figure 9.6).

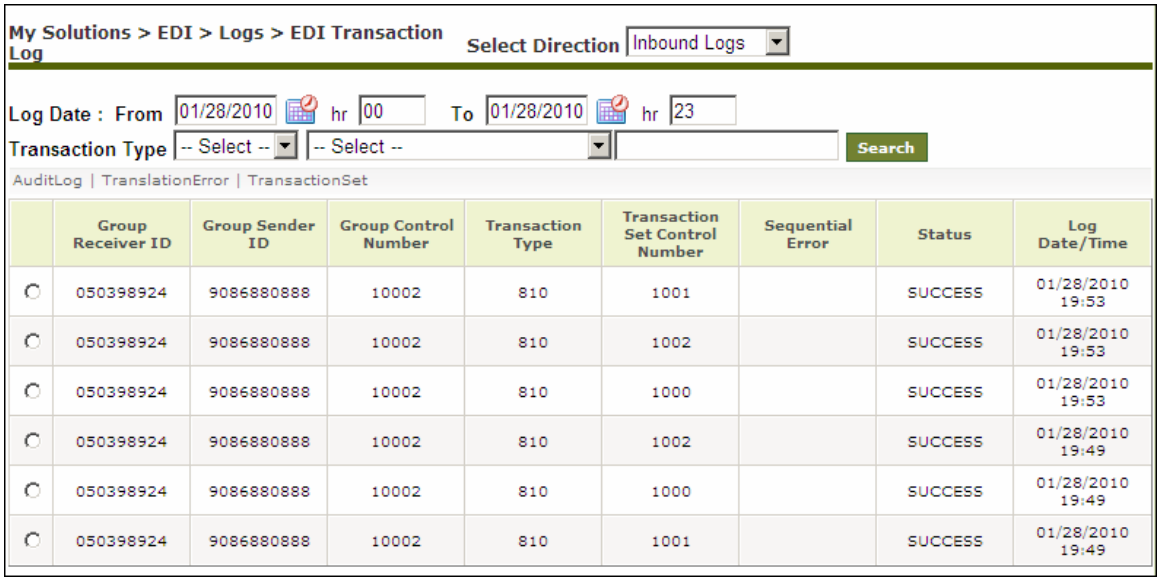

Figure 9.6: View EDI Transaction Log

2. From the *Select Direction* drop-down list, select whether you want to view logs for inbound transactions or outbound transactions.
3. Enter the start date and start time in *From* and *hr* field respectively.
4. Enter the end date and end time in *To* and hr field respectively.

	Click **Calendar** icon to select the *Start Date* and *End date* from calendar.

5. Click **Search** to view to logs of given time interval. Transaction logs of the selected time interval is displayed (see Figure 9.7).

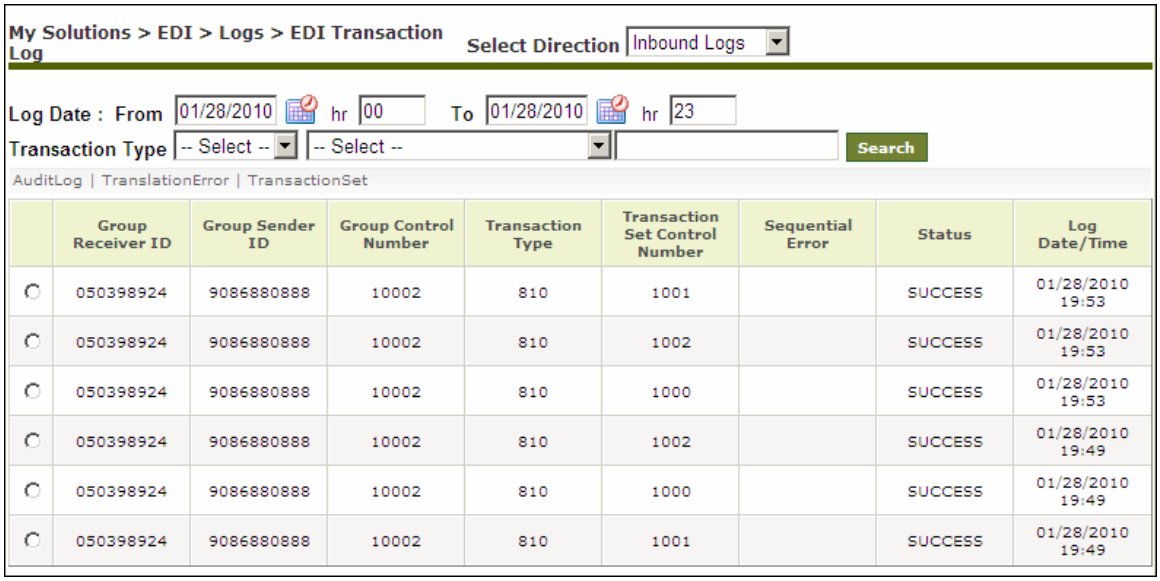

Figure 9.7: View EDI Transaction Log

	To search the transaction log based on Transaction Type, Group Receiver ID, Group Sender ID, Control number and Status etc, select the search criteria from the *Select* drop-list and enter the search value in the field adjacent to it. Now click Search.

6. To view detailed log of the process flow instance which is executed to process any particular transaction, select the transaction and click *Audit Log*. Detailed Process Flow log is displayed for the particular process flow instance which is executed to process the selected transaction (see Figure 9.8).

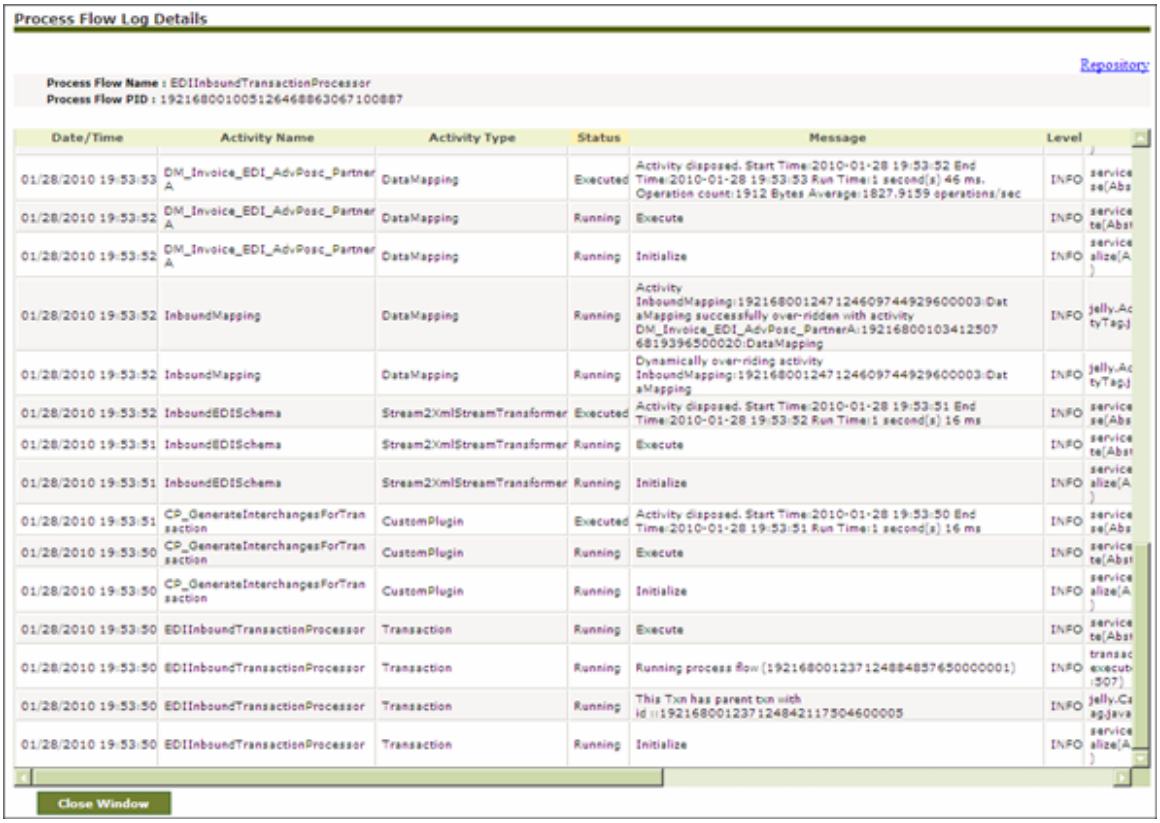

Figure 9.8: View Process Flow Log

	Process Flow log is helpful incase any transaction is not processed properly.

7. If any transaction set is not processed successfully because of any error, its status is displayed as *ERROR* in EDI Transaction Log. To see the detailed Error, select the transaction set and click *TranslationError* link (see Figure 9.9).

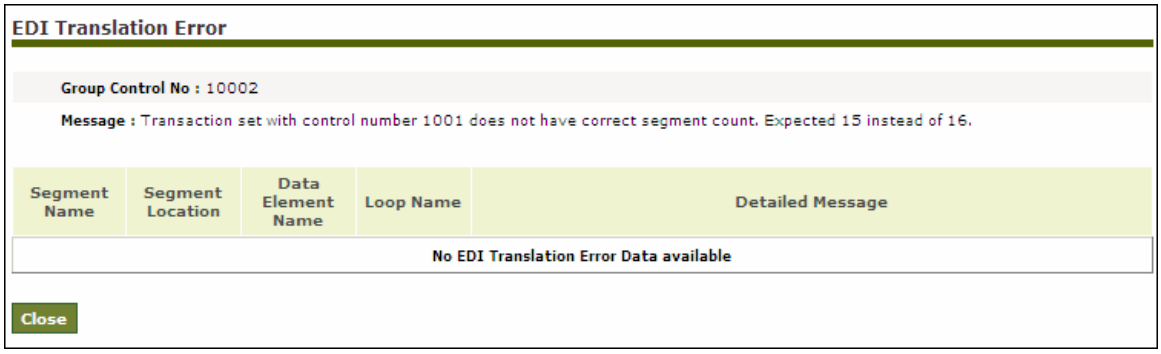

Figure 9.9: EDI Translation Error

8. To view the segments of a transaction set, select the transaction on EDI Transaction Log page and click *Transaction Set* link (see Figure 9.10).

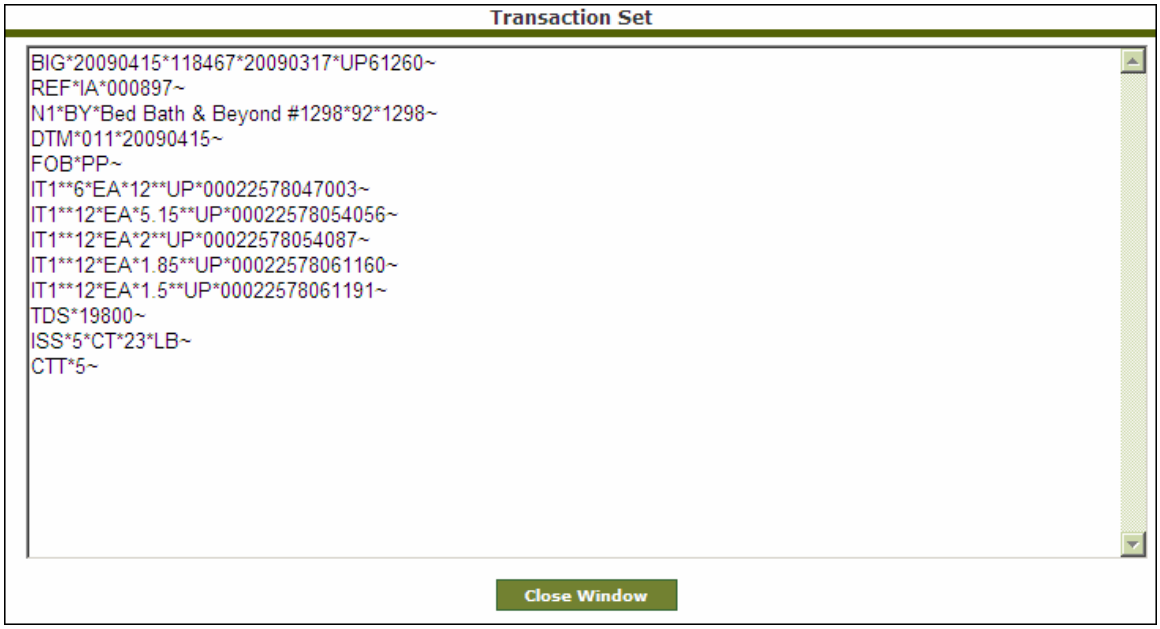

Figure 9.10: EDI Transaction Set

Re-Transmitting an EDI Interchange or Transaction Set

EDI Accelerator also provides you feature to re-transmit EDI Interchange or Transaction Set that you have already sent.

When you retransmit any interchange it sends the same interchange again without changing the control numbers.
When you retransmit any transaction set, it gets queued in the outbound queue and is sent when the batch event is triggered.

Steps to retransmit interchange or transaction set

1. In Workspace menu, click **My Solutions -> EDI -> Logs -> EDI Retransmission**. The *EDI Retransmission* screen is displayed (see Figure 9.11).

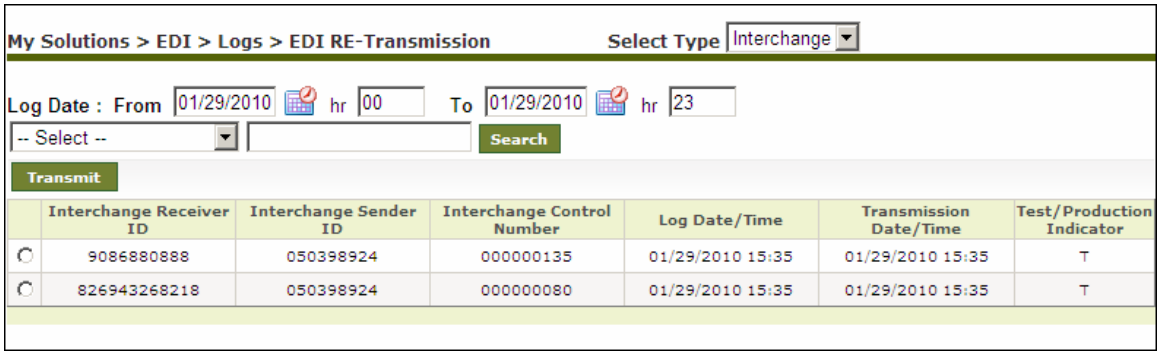

Figure 9.11: EDI Re-Transmission

2. Select the type (Interchange or Transaction) from the *Select Type* drop-down list.
3. Enter the start date and start time in *From* and *hr* field respectively.
4. Enter the end date and end time in *To* and hr field respectively.

	Click **Calendar** icon  to select the *Start Date* and *End date* from calendar.

5. Click **Search** to view to logs of given time interval. Interchange or Transactions of the selected time interval is displayed (see Figure 9.11).
6. Select the required Interchange or Transaction and click **Transmit**. A confirmation message is displayed the selected Interchange or Transaction has been re-transmitted.

10 RECEIVING NOTIFICATIONS

This chapter covers the following topics:

EDI Processing Errors

If any error occurs during EDI data processing, a notification is sent through email. Notifications are sent for following types of errors:

- System Level Errors
- EDI Translation Errors

System Level Errors

System level errors cover those errors which fails the EDI processing. For example

- When the trading partner is not defined in the system
- When relationship is not defined in the system
- When schema is not defined for any particular message

EDI Translation Error

Any error in transaction sets comes under EDI Translation Error. For example

- When a mandatory segment is missing
- When a segment has Data Element Error
- When the number of included segments do not match actual count

Receiving EDI Notifications

To receive EDI notifications, you need to perform the following high level steps:

1. Configure Mail Server parameters in Update System Properties
2. Update Mail Target Activities

3. Update Mail Notification Activities

	To perform these steps you need to login as *Admin* user.

Configure Mail Server Parameters in Update System Properties

Steps to configure the Mail Server parameters:

1. In the Workspace menu, click **Administer -> Configure ->Application Settings**. The Application Settings screen is displayed.
2. Click **Update System Properties**. The Update System Properties screen is displayed (see Figure 10.1).

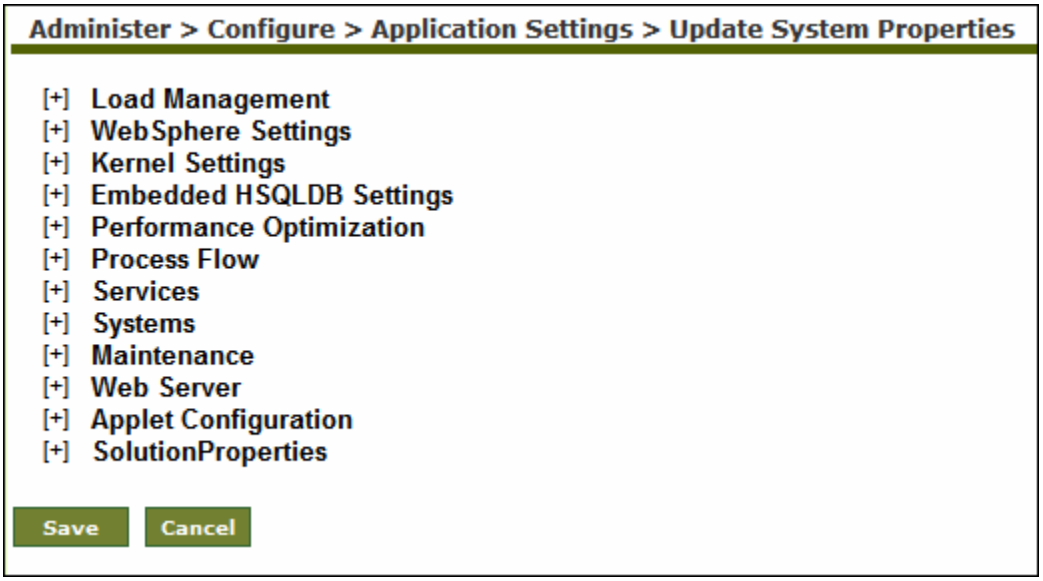

Figure 10.1: Update System Properties

3. Click **[+] Systems** properties and then further expand the **Server Mail Server Parameters** (see Figure 10.2).

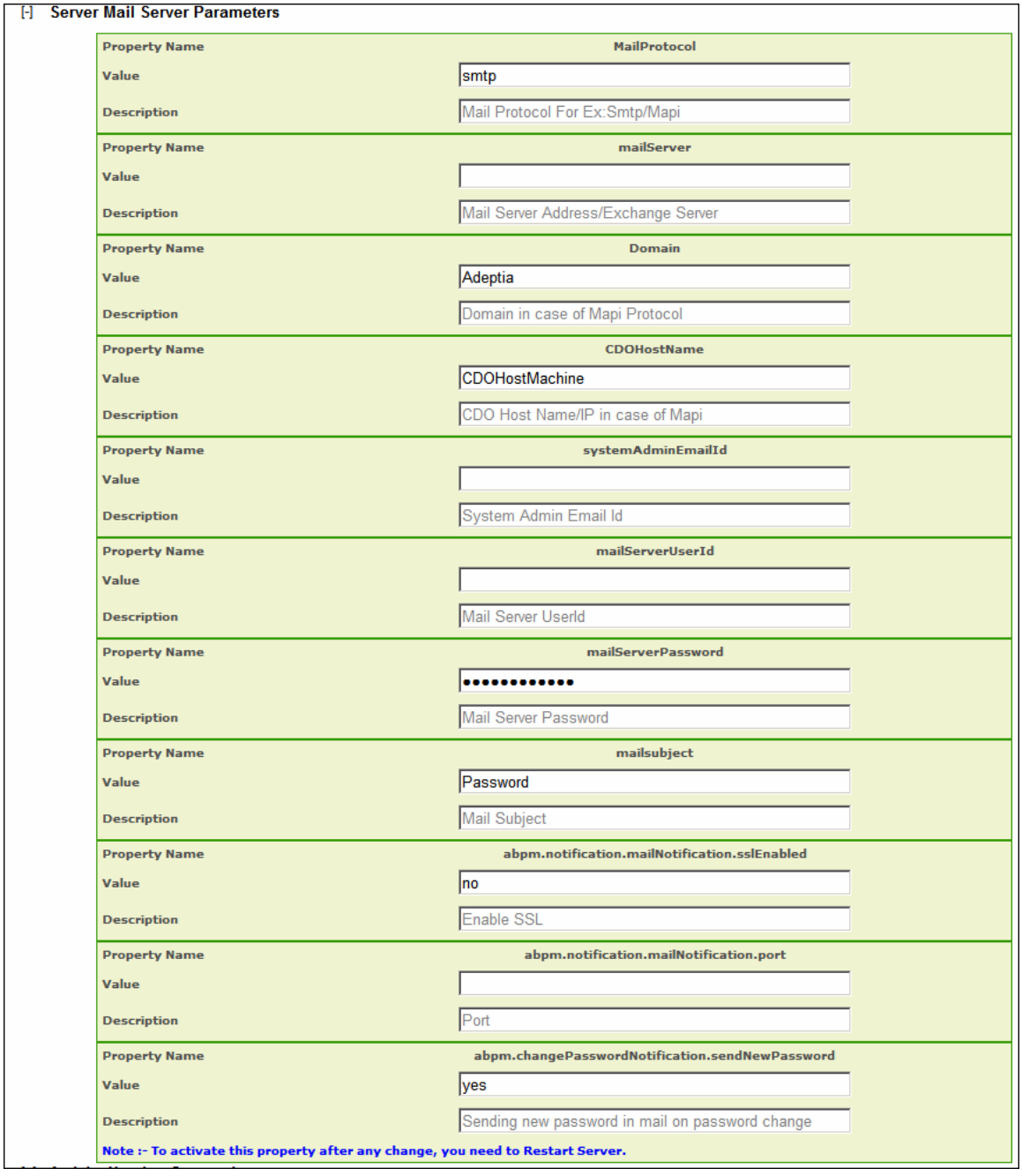

Figure 10.2: Expand Properties

4. Edit the following properties:
   - Mail Protocol
   - Mail Server
   - Mail Server user Id
   - Mail Server Password
   - abpm.notification.mailNotification.sslEnabled (If your mail server is SSL enabled, then enter *yes.)*

- abpm.notifocation.mail.notification.port (Port of Outgoing Mail Server).

5. Click **Save** button. A screen is displayed confirming that System Properties have been saved.

	Changes made in the System Properties do not come into effect until you reload the configuration. To reload the configuration, click **Reload Configuration** in the Application Settings screen. For detailed information about the properties and their possible values refer to *Appendix A* of *Administrator Guide*.

Update Mail Target Activities

You need to update the following Mail Target activities:

- EDIInterchangeErrorNotification
- EDINACKNotification

Steps to update the Mail Target activities:

1. In the Workspace menu, click **Design -> Target ->Mail**. The Manage Mail Target screen is displayed.
2. Select the mail target activity that you want to update and click the **Edit** link. The selected target activity is displayed in edit mode. A sample target activity in edit mode is displayed (see Figure 10.3).

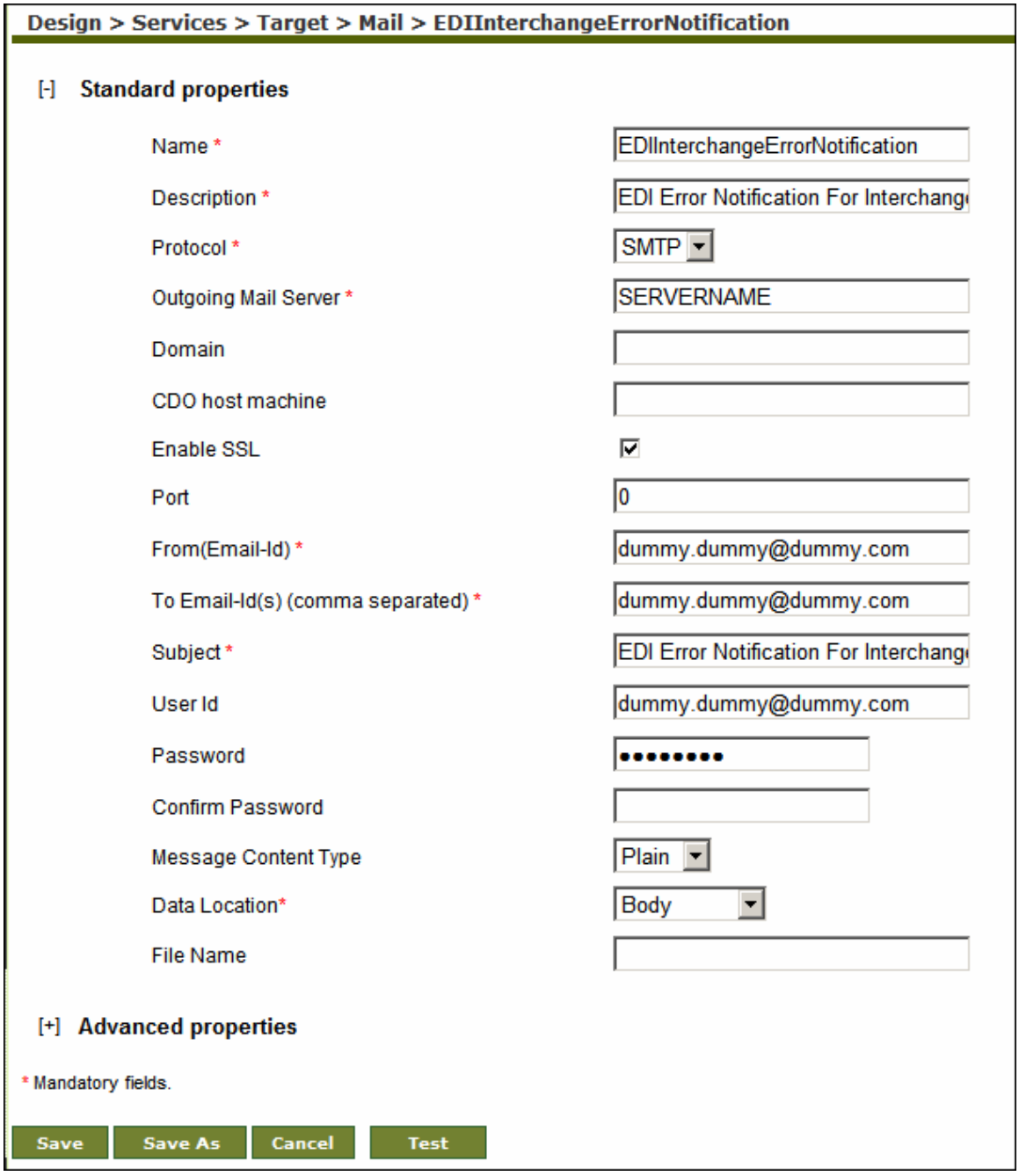

Figure 10.3: Update Mail Target Sample

3. Edit the following parameters of the mail target activities as per your mail server configuration:

   - Outgoing Mail Server
   - Enable SSL
   - Port
   - From Email Id
   - To Email Id

- User Id
- Password
- Confirm Password

	The email address defined in the *To Email Id* field gets overridden by email address defined in *Email* field of the trading partner, which will be used during EDI Processing.

4. Once you have updated the mail target activity, click **Save** to save the changes.

Update Mail Notification Activities

You need to change the following mail notification activity:

- SystemErrorNotification

Steps to update the Mail Notification activity:

1. In the Workspace menu, click **Design -> Notification ->Mail Notification**. The Manage Mail Notification screen is displayed.
2. Select the mail notification activity that you want to update and click the **Edit** link. The selected notification activity is displayed in edit mode. A sample notification activity in edit mode is displayed (see Figure 10.4).

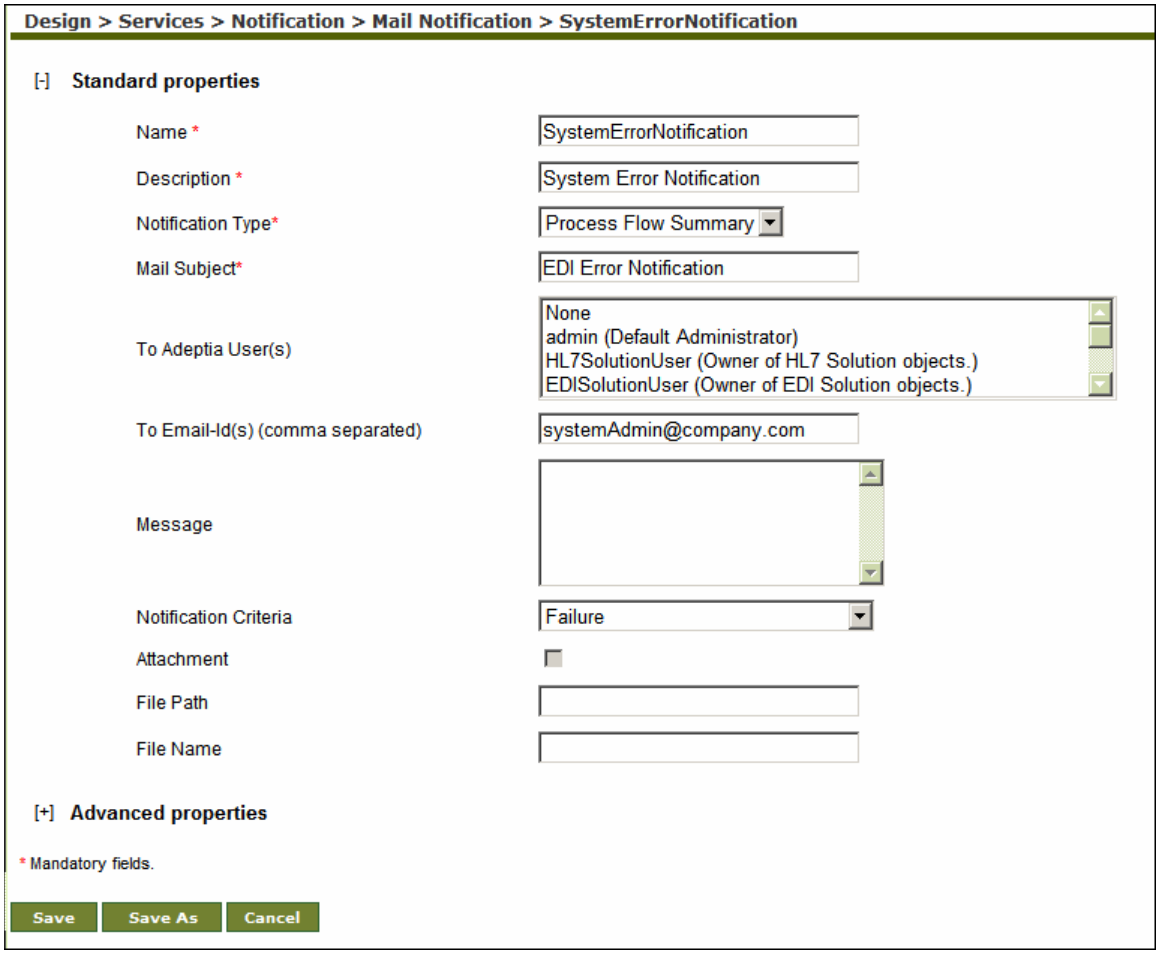

Figure 10.4: Update Mail Notification Sample

3. Edit the *To Email Id* field of the mail notification activity and email address of the person to who system level error need to be sent.
4. Once you have updated the mail notification activity, click **Save** to save the changes.

TABLE OF FIGURES

TABLE OF TABLES