



# TrustedLink® Windows

## **User Guide**

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## **TrustedLink Windows User Guide**

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Product Support: U.S.—1.877.446.6847 (1.877.4INOVIS); EMEA—I+44 (0)1483 569388

For International support outside EMEA, call +1 404.467.3806

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Inovis  
11720 AmberPark Drive  
Alpharetta, Georgia 30004  
tel +1 877.446.6847  
[www.inovis.com](http://www.inovis.com)

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# Introduction

**T**his TrustedLink® Windows document Introduction is organized as follows:

- “About this Document” on page 19
- “Conventions Used In This Document” on page 20
- “TrustedLink Windows Documentation” on page 21
- “Product Support and Assistance” on page 21

## About this Document

The guide is organized as follows:

Chapter or Appendix Name		Contents
1	“Overview”	Overview of the TLW application.
2	“Getting Started”	Learn basic TrustedLink Windows concepts, including how to get started, receive your first document from a trading partner, and update a trading partner definition.
3	“Managing Trading Partners”	Create and maintain trading partner definitions to meet trading partners’ e-Commerce requirements and process your data correctly.  Includes a reference to the trading partner fields and their relationship to envelope segments.
4	“Communications”	Send and receive e-Commerce documents and other files.
5	“Operations”	Set up user preferences, start Operations, and find documents. Includes a TrustedLink Windows Operations window and menu reference.
6	“Processing Incoming Documents”	Process incoming documents, including how to print, view, and map documents.
7	“Preparing Outgoing Documents”	Create outgoing documents, including data entry, mapping, and Document Turnaround maps.
8	“Automating Tasks”	Create, schedule and execute scripts that automatically perform routine TrustedLink Windows tasks.
9	“Advanced Document Management”	Organize, archive, back up, and delete documents after they have been sent or processed.

Chapter or Appendix Name		Contents
10	“Advanced Data Management”	Perform specialized data management tasks: <ul style="list-style-type: none"> <li>■ Part Cross-Reference tables</li> <li>■ Names and Addresses tables</li> <li>■ Accums tables</li> <li>■ Audit Criteria</li> <li>■ Acknowledgment reconciliation</li> <li>■ Document numbers</li> <li>■ Manually auditing and bundling documents</li> </ul>
11	“Advanced Administration”	Perform advanced administration tasks: <ul style="list-style-type: none"> <li>■ View the Log File</li> <li>■ Extract and merge components</li> <li>■ View e-Commerce dictionaries</li> <li>■ Set password security</li> <li>■ Rebuild database tables</li> <li>■ Administer AS2 connectivity</li> </ul>
A	“TrustedLink Windows Flat File Layout”	Technical information for creating flat files.
B	“VAT Reports and TAXCON Messages”	United Kingdom customers can set up TrustedLink Windows to automatically create VAT reports from invoices you send or receive.

## Conventions Used In This Document

The following conventions are used to call attention to names, screen output, and program code. .

This convention	Indicates	Example
<b>bold text</b>	Button names, keys, menu options, hyperlinks, values entered in fields or selected in dropdowns, and names of dropdowns, radio buttons, and fields when the names are phrases, not one or two words.	<b>Save</b>
Title Case	Names of pages, dialogs, forms, tabs, reports, and names of dropdowns, radio buttons, and fields when they are one or two words.	Trading Partner List
Lucida Console font	Indicates a URL, application code, command name, file name, directory path, or DOS or UNIX screen output. Italics indicate variables. Angle brackets <> indicate the enclosed material is optional.	<code>fillname</code>
<i>Italic</i>	Name of book or guide, name of a variable, or a new term the first time that it appears.	<i>TrustedLink Windows Installation Guide</i>
	In a syntax line, a pipe within square brackets separate a choice between parameters.	[warning   violation]

## TrustedLink Windows Documentation

This is part of a documentation set that describes TrustedLink Windows product information management software. These documents are available online from Inovisworks.

## Product Support and Assistance

You can go to the Inovis Solution Center Customer Support website at <https://customer.inovis.com/> to obtain contact information and access to the Inovis Customer Portal, where you can do the following:

**Note:** In TrustedLink Operations, click **Help** > **On the Web** > **Online Support** to open this Web page.

- Engage directly with support specialists.
- Read Inovis news and announcements.
- Search a Knowledge Base.
- Find user groups.
- Download software, patches, and forms.
- Read and download product documentation and literature.
- Update your user profile.
- Register for training.
- Submit, update, and check the status of service requests.
- Check the status of a service order.
- Attach files to send to Inovis.

Inovis staffs and maintains customer support locations throughout the world. The preferred method of contact is to go to the Inovis Customer Portal, where you can create a service request and track its progress. Your service request is routed automatically based on the skills required to resolve the issue and the most readily available resource. For a Severity 1 matter, please call your regional organization to ensure immediate engagement 24 x 7. All other issues are handled during normal business hours.

Region	Telephone	Email Address	Hours of Operation
Americas	1.877.4INOVIS (1.877.446.6847)	<a href="mailto:eservices@inovis.com">eservices@inovis.com</a>	8:00 am - 8:00 pm ET Monday - Friday (excluding company holidays)
EMEA	44.1483.569.388	<a href="mailto:support.emea@inovis.com">support.emea@inovis.com</a>	9:00 am - 6:30 pm CET Monday - Friday (excluding company holidays)

### To find your PSN and Customer ID

In TrustedLink Operations, click **Help** > **About TrustedLink**.

### Product Training Assistance

Inovis offers training on its electronic commerce products, including TrustedLink Windows. To view the current schedule and pricing, or to sign up for a training class, click <https://customer.inovis.com/>, then click the **Training** tab.



# Overview

**T**rustedLink® Windows lets you create, process, and exchange e-Commerce documents with any trading partner.

- “TrustedLink Windows” on page 23
- “TrustedLink Windows Remote User Interface” on page 23
- “Inovisworks Services” on page 24
- “TrustedLink Windows Modules” on page 25

## TrustedLink Windows

TrustedLink Windows translates business data between e-Commerce standard formats and business application or printable formats. The basic functionality includes data entry, printing, flat filing, document management, acknowledgment reconciliation, communications (sending and receiving), and communications scheduling.

Mapper (formerly Catalyst:Map™) creates maps for TrustedLink Windows that integrate business application data with EDI documents. Mapper provides wizards and drag-and-drop functionality for creating maps. You can use mapping rules for simple conversions, or use formulas or JavaScript for more complex conversions. For more information, see the *TrustedLink Windows Mapper User Guide*.

## TrustedLink Windows Remote User Interface

An optional Remote User Interfaces extends the TrustedLink Windows solution to remote locations within the enterprise.

The TrustedLink Windows installation and each Remote User Interface installation are separate. The Remote User Interface connects to TrustedLink Windows using a shared network path on the TrustedLink Windows computer. This means the Remote User Interface does not include security or network features common to client-server architectures.

The Remote User Interface only supports a Microsoft Windows Networks connection to TrustedLink Windows.

The Remote User Interface comes in packages of three or six. It requires a valid TrustedLink Windows installation with licensing for the Remote User Interface. TrustedLink Windows controls the number of Remote User Interface installations using a license key.

The Remote User Interface gives users the ability to:

- Create new EDI documents from a given form.

- Modify existing documents.
- Preview and print forms.
- Perform flat file to EDI mapping and EDI to flat file mapping
- Launch communications.

**Important:** All trading partner configuration and file merging operations occur at the main TrustedLink Windows installation.

For complete information, see the *TrustedLink Windows Remote User Interface User Guide*.

## Inovisworks Services

Inovisworks™ is an Internet-based e-Commerce service that extends the functionality of TrustedLink Windows. You register on Inovisworks as part of the TrustedLink Windows installation process.

**Note:** New TrustedLink Windows installations are registered on Inovisworks. Upgrade TrustedLink Windows installations are registered on Get2Connect.net.

As a registered user, you can:

- Exchange electronic documents if you selected a trading mailbox during registration
- Administer your document mailbox
- Access Web-based technical support with Customer Self-Service
- Receive software updates and components electronically

### To access Inovisworks

Do one of the following

- In TrustedLink Windows Operations, click **Help > Inovis** on the Web > Inovisworks.
- Click <http://www.inovisworks.net> or type the address in your Web browser.

### Inovisworks Options

The Inovisworks home page and technical support functions include the following options:

- Home—View your account transactions, messages and services.
- Document Tracking—Search and track documents online.
- Reports—View billing usage, trading partner information, and download document summaries.
- Administration—Modify account information, passwords, and users.
- Support—Log and track support requests, search the knowledge base, view FAQs, and download product forms, documentation, contacts, and other resources. See “Product Support and Assistance” on page 21.



## TrustedLink Windows Modules

TrustedLink Windows modules enhance your productivity, integrate TrustedLink Windows with other business applications, or let you comply with specialized trading partner requirements.

Module Name	Features
TrustedLink Windows	Stand-alone version of TrustedLink Windows through which all communications occur.
TrustedLink Windows Remote User Interface	Remote version of TrustedLink Windows for use in conjunction with the main installation of TrustedLink Windows.
Task Automation	<p>Performs TrustedLink Windows functions automatically and at scheduled times, and groups commands for batch execution. You can schedule TrustedLink Windows to perform unattended communications and print e-Commerce documents.</p> <p>The full Task Automation module can perform all routine tasks except keyboard data entry.</p> <p><b>Note:</b> This module lets you maximize resource use by scheduling some functions at night or other times when machines are not needed and costs are lowest.</p>
TrustedLink Windows Forms	<ul style="list-style-type: none"> <li>■ Creates custom data entry and print forms tailored to meet specific trading partner requirements.</li> <li>■ Develops Document Turnaround maps that create outgoing e-Commerce documents from data in incoming documents. A single incoming document can be turned around to create one or more outgoing documents.</li> </ul>
Mapper	<p>Mapper is purchased separately.</p> <ul style="list-style-type: none"> <li>■ Creates mapping definitions that maintain complex relationships between e-Commerce document formats and application formats.</li> <li>■ Rapidly processes large documents and high volumes of documents.</li> <li>■ Integrates e-Commerce data directly with your internal applications without additional programming.</li> </ul>
TrustedLink Windows Map (STMAP)	<ul style="list-style-type: none"> <li>■ Creates mapping definitions that maintain complex relationships between e-Commerce document formats and application formats.</li> <li>■ Rapidly processes large documents and high volumes of documents.</li> <li>■ Integrates e-Commerce data directly with your internal applications without additional programming.</li> </ul>



**T**his chapter describes basic TrustedLink concepts. It also provides step-by-step instructions that describe how to get started.

- “Before You Send or Receive Documents” on page 27
- “Basic Concepts” on page 28
- “TrustedLink Components” on page 29
- “Downloading Forms and Log-ons” on page 29
- “Merging Forms, Log-ons, and Maps” on page 31
- “Configuring Log-on Information” on page 32
- “Configuring AS2 Communications” on page 34
- “Receiving a Document from a Trading Partner” on page 39
- “Updating a New Trading Partner Definition” on page 41
- “Defining Outgoing Document Types for a Trading Partner” on page 42
- “Assigning Forms and Maps to Trading Partner Documents” on page 43

## Before You Send or Receive Documents

Before exchanging documents with trading partners, make sure TrustedLink Windows is ready:

- └ Ensure TrustedLink Windows has been installed, registered, and set up on Inovisworks™ as described in the *TrustedLink Windows Installation Guide*.
- └ Ensure your Internet connection, or modem and phone line, is installed and working.
- └ Set up a network account or agreement with a network service, direct connection to a company, or Internet Service Provider. If you are connecting by modem, obtain the login ID, password, and telephone number from your network service.
- └ If you do not use Inovisworks to exchange documents, you must merge and configure a Log-on for each network service you use. See “Merging Forms, Log-ons, and Maps” on page 31 and “Configuring Log-on Information” on page 32.
- └ Contact your trading partner or e-Commerce coordinator about testing procedures before you exchange production documents. The trading partner might designate a third party to carry out the testing on its behalf.

- └ Except for AS2 trading partners, request a trading partner send a document to you for testing. When you receive a document from a new trading partner, TrustedLink automatically creates a trading partner definition for you.

**Note:** AS2 trading partners must be defined in TrustedLink before you can exchange documents. If any trading partner cannot send a document for testing, you must add a trading partner definition before you send documents. See “Creating a New Trading Partner Definition” on page 47.

## Basic Concepts

- “Types of Networks” on page 28
- “Using a Log-on to Communicate with Networks” on page 28

### Types of Networks

In terms of e-Commerce, a *network* is any communication service provider, such as Inovisworks, you use to exchange e-Commerce data with your trading partners. A network can be a:

- Direct connection to a network provided by a company for its suppliers
- Third-party Value-Added Network (VAN)

If you purchase an account on an e-Commerce network, they must provide a mailbox, a log-in ID, and a password. Documents you receive from your trading partners are stored in your mailbox, and the network distributes the documents you send to your trading partners.

### Using a Log-on to Communicate with Networks

A Log-on is a customized TrustedLink component that handles the interface between your computer and your VAN or network. After you select the Log-on and the communications task you want to perform, the Log-on does the rest. The Log-on:

- Initiates the connection (for example, sends a command to the modem to dial the appropriate number)
- Sends your ID and password to the network
- Gives the appropriate commands to transmit your data
- Disconnects from the VAN or network

A Log-on also defines the communications functions you can perform during a communications session. These tasks vary from one network to another, but three functions are available on almost all networks:

- Send Only
- Receive Only
- Send and Receive (combines both tasks into one command)

You must have a Log-on for each network you use. For use with the Inovis VAN, an Inovisworks log-on is automatically installed with TrustedLink. Inovis offers Log-ons for many networks. These log-ons can be purchased from Inovis sales.

You can set a default Log-on in the General tab under **Documents > Preferences**. The default Log-on is highlighted in a list, making it easier to find.

**Note:** The TLW Async Utilities (AUTILITY) Log-on automatically installed with TrustedLink is for testing and troubleshooting. It does not affect your operations or require any maintenance. Use it only if instructed to do so by Inovis Customer Support.

## TrustedLink Components

For TrustedLink to operate, you must merge (install) external components into the TrustedLink database.

Component	Description
Forms (also called overlays)	<ul style="list-style-type: none"> <li>Used for viewing, creating, and printing documents.</li> <li>Required for each document type exchanged with each trading partner.</li> <li>Download forms from <a href="https://customer.inovis.com">https://customer.inovis.com</a></li> </ul>
Log-ons	<ul style="list-style-type: none"> <li>Conduct communications between your computer and your trading partners through a network service or the Internet.</li> <li>Required for each network service you use for exchanging documents. TrustedLink automatically installs and configures a Log-on for communications through Inovisworks.</li> </ul> <p><b>Note:</b> Other Log-ons are available through Inovis sales.</p>
Custom Components	<p>Depend on the trading partners in your business community and the methods you choose for processing and transmitting data. Custom components are provided on separate media and include:</p> <ul style="list-style-type: none"> <li>Log-ons</li> <li>File Maps—Customized for your company, file maps integrate EDI data with your other business applications. You can map EDI documents to or from another application's file format.</li> <li>Custom Form—A print overlay that Inovis creates for a customer to print non-standard data.</li> <li>Trading Partner Kit—Includes specialized forms or utilities for a trading partner, usually a hub company. Follow any separate instructions provided with the kit.</li> </ul> <p><b>Important:</b> Custom Forms installed with TrustedLink 4.34 and earlier are not compatible with the current version of TLW. Contact Inovis sales for more information.</p>

## Downloading Forms and Log-ons

Forms (also called overlays) translate raw EDI data into a format that is easy-to-view.

This Data Entry Overlay is easier to view than the underlying EDI information.

INVOICE DATE	INVOICE #	DC #	PL #	SEND DATE
04/23/04				04/23/04
BUYER NAME	SELLER NAME			
LINE ITEM TABLE				
TOTAL QTY	ORDER CODE	TRANS	LSN #	

Forms are customized to meet a specific trading partner's e-Commerce specifications. Each document type you exchange with a trading partner requires a form.

**EXAMPLE**

If you plan to send X12 invoices (810 transaction code) to Acme Corporation, you must download Acme Corporation's form for an 810 Invoice. A form for a different company or document type does not create invoices in the format Acme Corporation requires.

**Form Types**

You must download forms for each document type for each trading partner. The forms help you create, print, and transform incoming documents into outgoing documents:

Form Type	Purpose
Data Entry Overlay	Enter data from a keyboard to create e-Commerce documents, or map documents to and from flat files.
Print Overlay	Print e-Commerce documents in a readable layout, and map documents to and from flat files.
Document Turnaround Map (Optional)	Convert fields from an incoming document to fields in an outgoing document (for example, transforms the fields in a purchase order to the fields in an invoice). A Document Turnaround Map saves data entry time and prevents errors.

**Downloading Forms and Log-ons**

The Inovis Customer Portal provides thousands of forms TrustedLink forms for more than 2,000 trading partners.

**Note:** If you upgraded from a previous TrustedLink version, check for updated forms.

**To download forms**

- 1 Go to <https://customer.inovis.com/>.  
The Customer Portal opens.
- 2 Log on with the user name and password you entered during TrustedLink registration.
- 3 In the left pane click **Download Forms**.  
A new page opens listing all available forms.
- 4 To narrow the list by trading partner, form type, version, and so on, click the **Click here to search for forms** link above the forms list.  
The search page opens.
- 5 Enter data in the fields as needed to narrow your search of the forms database.  
**Note:** If you use the Version search field, type an asterisk ( \* ) before the version number you are searching for.
- 6 Click **Go** at the bottom of the page.  
The forms list page reopens displaying only forms that match your search criteria.
- 7 Click the form link you wish to download, then in the File Download dialog that opens, click **Save** to download the form.

**To download logons**

- 1 Go to <https://customer.inovis.com/>.

The Customer Portal opens.

**2** Log on with the user name and password you entered during TrustedLink registration.

**3** In the left pane click **Download Software**.

A new page opens.

**4** Under Table, click Logons for TrustedLink Windows.

A new page lists broad categories of logons—for example, Async Logons, FTP Logons, and so on.

**5** Click the category you wish to view.

The page resets to display a list of more specific logon categories—for example, logon types for different VANs under the broad category selected above.

**6** Click a logon in the list to view logons available for download.

Available logons are listed in the table.

**7** Click the logon link you wish to download, then in the File Download dialog that opens, click **Save** to download the logon.

## Merging Forms, Log-ons, and Maps

After you download forms, log-ons, and maps from the Inovis Customer Portal, you must merge (install) them into the TrustedLink database on your computer.

- “Standard File Extensions” on page 31
- “Merging Forms, Log-ons, Maps, or Custom Forms” on page 31

### Standard File Extensions

These file extensions indicate the following components:

File Extension	Type of Component
*.mrg	Extracted merge file containing Custom Forms or multiple component files
*.scr	Log-on
*.map	File Map created with STMAP (TrustedLink Mapper)
*.met	File Map created with Mapper™

### Merging Forms, Log-ons, Maps, or Custom Forms

#### To merge Forms, Log-ons, File Maps, or Custom Forms

**1** Click **Start > Programs > Inovis > TrustedLink > TrustedLink Administration**.

The TrustedLink Administration window opens.



**2** Click **Merge**.

The Merge window opens.

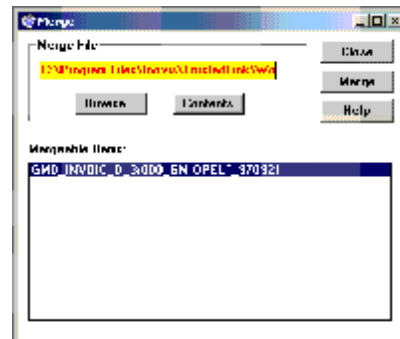
**3** Click **Browse** and navigate to the location of the forms you downloaded or other components you received.

**4** Browse to the folder in which the form is saved, In the Files of type field, select **All Merge Files**.

**5** Select the file you want, and click **Open**.

**6 Click Contents.**

One or more files are listed under Mergeable Items.



**7 Click Merge.**

The selected components are installed in TrustedLink.

**8 Repeat steps 3 through 7 for each \*.mrg, \*.scr, \*.map, or \*.met file until you have merged all downloaded files into TrustedLink Windows.**

**9 Click Close to close the Merge window.**

**10 To configure the log-ons you just merged, go to “Configuring Log-on Information” on page 32.**

## Configuring Log-on Information

Before using a Log-on for the first time, you must enter basic information such as the phone number to call, and the user ID and password assigned to you by the network. Log-on instructions provide details about the information to enter for a network. Other than the password, you usually do not need to change this information again.

If you plan to use the Log-ons provided with TrustedLink, you do not need to make changes to them.

A Log-on variable may not required by your VAN, but TLW may require that you populate that field. In this case, type “NA” or some other filler text.

This section is organized as follows:

- “Editing a Log-on” on page 32
- “Editing Advanced Log-on Properties” on page 34

### Editing a Log-on

**To edit a Log-on**

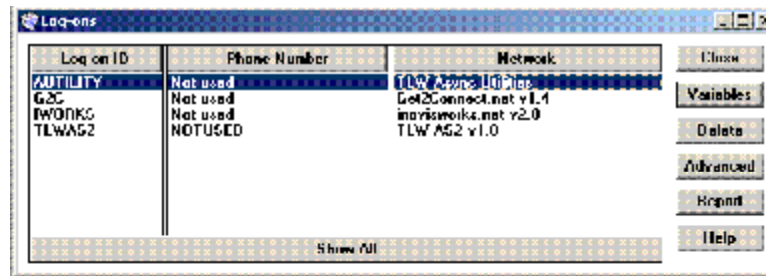
**1 Click Windows Start > Programs > Inovis > TrustedLink > TrustedLink Administration.**



**2 Click Log-ons.**



The Log-ons window opens.



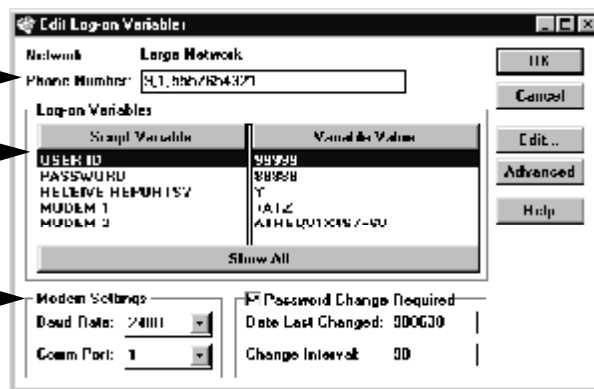
- 3 Select the Log-on and click **Variables**.

The window opens.

Edit the phone number here. See step 4.

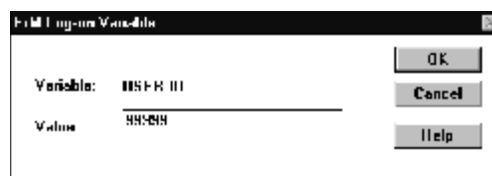
Edit variables here. See step 5.

Edit modem settings here. See step 7.



- 4 To change the phone number, type the new number in the Phone Number field. If a pause is needed to wait for an outside line dial tone, type a comma for the pause.
- 5 To change a Script Variable, select the variable and click **Edit**.

The Edit Log-on Variable dialog box displays the current value.



- 6 Type the new value in the Value box and click **OK**.  
The new value is shown in the Value column in the window.
- 7 To change the Baud Rate or Comm Port, select a new value from the dropdown.
- 8 Select the Password Change Required box and set an interval (optional).  
If the check box is selected, TrustedLink reminds you to change your password before it expires.

### Editing Advanced Log-on Properties

Additional communication information is available in the Edit Log-on Advanced Properties window. This information is pre-set for each Log-on, and usually does not change.

#### To view the information



- 1 Click **Start > Programs > Inovis > TrustedLink > TrustedLink Administration**.
- 2 Click **Log-ons**.
- 3 In the Log-ons window, click **Advanced**.

The Edit Log-on Advanced Properties window opens.

- 4 Modify the information as appropriate. See “Edit Log-on Advanced Properties Field Descriptions” on page 103.

## Configuring AS2 Communications

This section is organized as follows:

- “Configuring AS2 for BizConnect Versions 3.1 and 3.2” on page 34
- “Configuring AS2 for BizConnect Versions 2.4.x and 3.0” on page 35

### Configuring AS2 for BizConnect Versions 3.1 and 3.2

If you use TLW’s optional AS2 functionality with BizConnect version 3.1 or 3.2, you must use the IPNet logon to send documents to or receive documents from AS2 trading partners.

**Note:** When using this logon, sent data is directed to the Directory Monitor path to be read and transmitted by BizConnect. Similarly, after BizConnect receives data, it directs the output file to the path in the Integration Agent, then the Communications/Receive option in TLW creates documents in the TLW In box from the file(s) received.

#### To use the IPNet Interface v1.2 logon with TLW and BizConnect

- 1 In TLW Administration, click **Edit > Log-ons** option.  
A dialog opens.
- 2 Click the IPNet Interface v1.2 logon, then click **Variables**.  
The Edit Log-on Variables dialog opens.
- 3 Click **SEND DIR**, then click **Edit**.

A dialog opens.

- 4 Set the path to the one assigned in the Directory Monitor in BizConnect, then click **OK** in the dialog. The default value in the IPNet Interface v1.2 logon is  
C:\BizConnect\Application\data\HostOutbound.
- 5 Click **RECEIVE DIR**, then click **Edit**.  
A dialog opens.
- 6 Set the path to the one assigned in the File Copy Upload Integration Agent in BizConnect, then click **OK** in the dialog. The default value in the IPNet Interface v1.2 logon is  
C:\BizConnect\Application\data\HostInbound.
- 7 Click **RECEIVE FILE MATCH**, then click **Edit**.  
A dialog opens.
- 8 Set the pattern match to either the default (\*.\*) or the desired characters, then click **OK** in the dialog. The default will instruct the software to read the specified folder and audit all files regardless of name or extension.
- 9 With **RECEIVE FILE MATCH** still selected, click **Advanced**.  
A new dialog opens. Unless your trading partners request that Carriage Return/Line Feed are required and that Full Blocking will be used, click these check boxes under Special Characters to remove the check marks from the boxes, then click **OK** in the dialog.
- 10 Click **SEND FILE EXTENSION**, then click **Edit**.  
A dialog opens.
- 11 Verify that **SEND FILE EXTENSION** is set correctly, then click **OK** in the dialog.
- 12 Assign the logon to the correct trading partners by editing the trading partner profiles in TLW Administration.

### Configuring AS2 for BizConnect Versions 2.4.x and 3.0

If you use TLW's optional AS2 functionality with BizConnect versions 2.4.x or 3.0, you must define AS2 settings for your company before you can use the TLW AS2 v1.0 Log-on to send documents to or receive documents from AS2 trading partners.

You use both TrustedLink and BizConnect to define the required information.

- "Accessing BizConnect from TrustedLink" on page 35
- "Adding a Certificate for Your Company" on page 36
- "Exporting a Certificate to Your Local Computer" on page 36
- "Defining Server Owner Properties for AS2 Communications" on page 37
- "Defining Processing Options for Functional Acknowledgements" on page 38
- "Defining Optional Server Owner Properties" on page 39

### Accessing BizConnect from TrustedLink

**Important:** Do not change the administrator user ID and password referenced in this procedure. If you change these values, TrustedLink will not be able to access BizConnect.

### To access BizConnect from TrustedLink

- 1 Click **Start > Programs > Inovis > TrustedLink > TrustedLink Administration**.

**2** Select **Edit > AS2 Configuration**.

**3** Click **Advanced**.

The BizManager/BizConnect logon screen opens.

**4** Type the administrator user ID and password (**admin/admin**), and click **Log On**.

### **Adding a Certificate for Your Company**

You use certificates to encrypt and sign documents sent to your AS2 trading partners. Use BizConnect to define a certificate for your company.

**Note:** You can either purchase a signing or encryption certificate from a certificate authority, such as Verisign, or you can use BizConnect to create the certificate.

### **To add a certificate using BizConnect**

**1** Access BizConnect as described in “Accessing BizConnect from TrustedLink” on page 35.

**2** Select **Parties** tab > **Party List** > **Server Owner**.

The Party Detail page opens.

**3** Next to Certificates tab, click **Add**.

**4** Type the name under which you want to save the certificate; for example, Signing and Encryption.

**5** Select the Trusted check box.

**6** For Source, select **Generate New**.

**7** Scroll down the page, and type the information for your organization.

**8** For Usage, select both the Encryption and Signing check boxes.

**9** Click **Submit**.

The new certificate displays on the certificate list on the Party Detail page.

**10** Go to “Exporting a Certificate to Your Local Computer” on page 36.

### **Exporting a Certificate to Your Local Computer**

Use BizConnect to export the certificate you just created to your local computer, so you can send it to your trading partners. The certificate will be used to encrypt files your trading partner sends to you.

### **To export the certificate to your local computer**

**1** Access BizConnect as described in “Accessing BizConnect from TrustedLink” on page 35.

**2** Select **Parties** tab > **Party List** > **Server Owner**.

The Party Detail page opens.

**3** Next to Certificate tab, select the certificate you created in “Adding a Certificate for Your Company” on page 36.

**4** Scroll to the bottom of the page. Next to Export Certificate, select **Export**.

**5** For Type, select Public.

**6** Click **Download**, then click **Save**.

**7** Navigate to the location on your computer where you want to save the certificate.

**8** Click **Save**.

The certificate (\*.cer) is saved to your local computer.

## Defining Server Owner Properties for AS2 Communications

Use TrustedLink Windows to define AS2 configuration information for your company.

### To define server owner properties

1 Click **Start > Programs > Inovis > TrustedLink > TrustedLink Administration**.

2 Select **Edit > AS2 Configuration**.

The AS2 Configuration window opens.

SMTP gateway  
information  
for your company.

AS2 Transport  
settings for your  
company.

Receive directory  
path for your  
company.

3 Type the SMTP (simple mail transfer protocol) gateway information for your company.

Field	Description
Our Server Address	Host name or IP address of the SMTP server you use to connect to the Internet.
Port	Port number for the SMTP server listed in the Our Server Address field.
Authentication Name/ Authentication Password	Name and password used for authentication on the SMTP server.

4 Type the AS2 Transport Settings information for your company.

Field	Description
Our AS2 Identifier	AS2 identifier that uniquely identifies your company in AS2 messages. This value is used in the header when a message from your company is sent over AS2.
Our AS2 URL	URL trading partners use when sending AS2 messages to you, including asynchronous MDNs (message disposition notifications) sent over HTTP. For example, http://atlmisdoc:9080/msgsrv/as2, if the server host name is atlmisdoc.
MDN From Email Address	E-mail address from which asynchronous MDNs will be sent; for example, joe.smith@acmecorporation.com.

Field	Description
Signing Certificate	Signing certificate for your company. This certificate digitally “signs” messages you transmit to your trading partners so they can verify who sent the message. Go to step 5 on page 38.
Encryption Certificate	Encryption certificate for your company. This is an optional “self-signing” certificate. When you send a message to a trading partner, the message is encrypted using the trading partner's public key certificate. BizConnect saves a copy of the sent message, and encrypts it with your encryption certificate so you can decrypt the message in the future. Go to step 5 on page 38.

- 5** Select or add the signing/encryption certificates.

**Note:** The certificates must be stored on your local computer.

If you want to...	Do this...
Select a certificate	<ul style="list-style-type: none"> <li>■ Click the <b>Ellipsis (...)</b> button.</li> <li>■ Select the certificate.</li> <li>■ Click <b>OK</b>.</li> </ul>
Add a certificate	<ul style="list-style-type: none"> <li>■ Click the <b>Ellipsis (...)</b> button.</li> <li>■ Click <b>Add Certificate</b>.</li> <li>■ In Certificate Name, type a description of the certificate.</li> <li>■ Click <b>Browse</b> to navigate to the certificate's location.</li> <li>■ Select the certificate and click <b>Open</b>.</li> <li>■ Click <b>OK</b> twice to return to the AS2 Configuration window.</li> </ul>

- 6** Type the Receive Directory Path, which is the name of the directory into which business document files will be placed.

**Note:** The path to the directory must be absolute, not relative (for example, c:\Bizconnect\Application\Data\HostUpload). Designate a directory that has enough disk space to store AS2 messages.

- 7** Go to “Defining Processing Options for Functional Acknowledgements” on page 38.

### Defining Processing Options for Functional Acknowledgements

To receive functional acknowledgements for documents transmitted using AS2 in TrustedLink, you must disable one setting in BizConnect.

#### To disable the functional acknowledgement setting in BizConnect

- 1** Access BizConnect as described in “Accessing BizConnect from TrustedLink” on page 35.
- 2** Click **Server** tab > **Settings**.
- 3** Under Misc. Settings, select the Turn Off FA Reconciliation check box.
- 4** Click **Submit**.

A message indicates the server settings have changed.

### Defining Optional Server Owner Properties

Use BizConnect to configure optional server owner settings for your company. You access BizConnect from TrustedLink.

#### To define optional server owner properties

- 1 Access BizConnect as described in “Accessing BizConnect from TrustedLink” on page 35.
- 2 Click **Parties** tab > **Server Owner**.
- 3 Click **User’s Guide** or **Help** to access the BizConnect documentation.

## Receiving a Document from a Trading Partner

You usually exchange test data with a new trading partner before you exchange documents in a production environment. When you receive a document from a trading partner (except for an AS2 trading partner), TrustedLink automatically creates a new trading partner record or definition. Modify the definition for the new trading partner after you receive it (see “Modifying a New Trading Partner Definition” on page 41).

**Note:** AS2 trading partners must be defined in TrustedLink before you can exchange documents. See “Creating a New Trading Partner Definition” on page 47.

- “Receiving the First Document” on page 39
- “Sending the First Document” on page 40

### Receiving the First Document

**Important:** The communications log-on must be set up before you can perform this procedure. See “Configuring Log-on Information” on page 32.

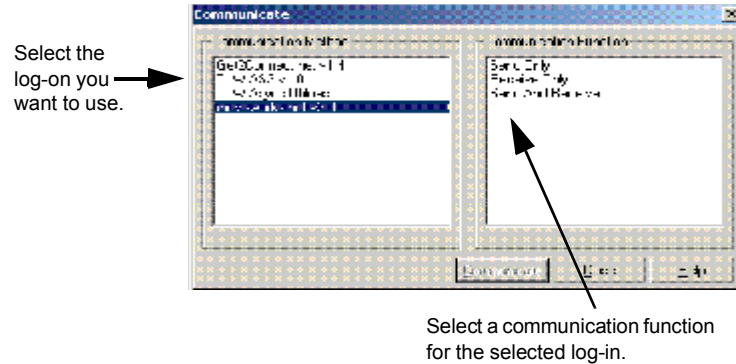
#### To receive your first document

- 1 Contact your trading partner and request a test document. After they send the test document, go to step 2.
- 2 Click **Start** > **Programs** > **Inovis** > **TrustedLink** > **TrustedLink Operations**.  
The Operations window opens.
- 3 Click **Communicate**.  
The Communicate dialog box opens.



- 4 In the Communication Method pane, select the Log-on you will use to communicate with your trading partner.

**Note:** You can set a default Log-on in the General tab under **Documents > Preferences**. The default Log-on is highlighted in a list, making it easier to find.



- 5 Select a communication function (usually Receive Only) and click **Communicate**.

The Results window displays the progress of the communications session. TrustedLink performs these actions:

- Puts received documents in the In folder.
- Puts received text documents and network messages in the Text Documents folder.
- If the trading partner does not exist on TrustedLink, the software:
  - Creates a New Trading Partner definition.
  - Issues a message that indicates you received documents from a new trading partner. The trading partner name is New Trading Partner. See “Updating a New Trading Partner Definition” on page 41.

- 6 If you received documents, click the **In** folder in the left pane of the Operations window. The documents are listed in the right pane.

### Sending the First Document

If your trading partner cannot send a test document (or if the trading partner uses AS2 to communicate), you must create a trading partner definition before sending documents to the trading partner.

**Important:** The communications log-on must be set up before you can perform this procedure. See “Configuring Log-on Information” on page 32.

### Before sending the first document to a trading partner

Follow this process:

You must...	See
Add a trading partner definition	“Creating a New Trading Partner Definition” on page 47.
Prepare the outgoing document	Chapter 7, “Preparing Outgoing Documents.”
Send the document	“Sending and Receiving Documents” on page 95.



## Updating a New Trading Partner Definition

If TrustedLink displays a message that indicates you received a document from a New Trading Partner after a communications session, it means TrustedLink did not recognize the sender and created a new trading partner definition. TrustedLink gives the name New Trading Partner (or if you already have a trading partner with that name, New Trading Partner 1, and so on) to the new trading partner.

To make the trading partner easy to identify, you can rename it.



**Note:** If you do not immediately recognize the trading partner, click **View Raw EC Data**. You can identify the trading partner by its interchange ID.

### Modifying a New Trading Partner Definition

You can change the generic name New Trading Partner to any name you choose. The name is used only within TrustedLink. Your trading partner does not see it. In most cases, the name can be up to 80 characters. If you process documents for this trading partner using EDI-to-flat file or flat file-to-EDI mapping, the name must be 12 characters or less.

#### EXAMPLE

A company name (such as Acme Corporation) or a specific division, plant, or location (such as Ann Arbor or Store 257).

#### To modify a new trading partner definition



- 1 Click **Start > Programs > Invois > TrustedLink > TrustedLink Administration**.
- 2 Click **Trading Partners**.
- 3 Select the New Trading Partner and click **Edit**.

The Trading Partner Control Panel opens.

Use these fields to identify your new trading partner.

- 4 In the Trading Partner Name and Company Code fields, modify the name and company code to make your trading partner easy to identify.

**Important:** If trading partners are listed in “Other Trading Partners sharing these Interchange IDs,” the changes you make to the Interchange Profile in 5 also apply to these trading partners.

- 5 Click **ISA Details**.

The X12 Interchange Profile opens.

- 6 In Profile Name, modify the interchange name associated with this trading partner.

**Important:** The interchange name must be different from the trading partner name. For a New Trading Partner definition, TrustedLink automatically puts “-Int” (for interchange) after the name in the Profile Name field.

Modify the interchange name associated with the trading partner.

- 7 Click **OK** twice.
- 8 Click **Close** to close the Trading Partner List window.

The new trading partner name is shown in the document list in the **In** folder in TrustedLink Operations.

## Defining Outgoing Document Types for a Trading Partner

While documents you receive from a trading partner are automatically added to the TrustedLink database, you must define all documents you will send to the trading partner, such as an invoice.

**Important:** The trading partner definition must include all document types you send to the trading partner.

### To define outgoing documents, or check for existing definitions

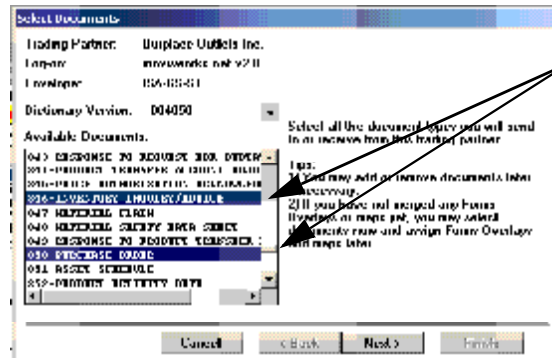


- 1 Click **Start > Programs > Inovis > TrustedLink > TrustedLink Administration**.
- 2 Click **Trading Partners**.
- 3 Select the trading partner name and click **Edit**.

The Trading Partner Control Panel opens.

- 4 In the Transaction Information or Message Information section, click **Add**.

The Select Documents window opens.



Hint: To select multiple document types, press the **Ctrl** key and select the document types.

- 5 Select one or more document types you plan to send to the trading partner from the list and click **Next**.

The Assign Overlays and Maps window opens.

- 6 Go to step 5 in “Assigning Forms and Maps to Trading Partner Documents” on page 43.

## Assigning Forms and Maps to Trading Partner Documents

After setting up your trading partner, you must assign one or more forms or maps to each document type you plan to exchange with the trading partner. You must complete this process before you can send or receive documents in a production environment.

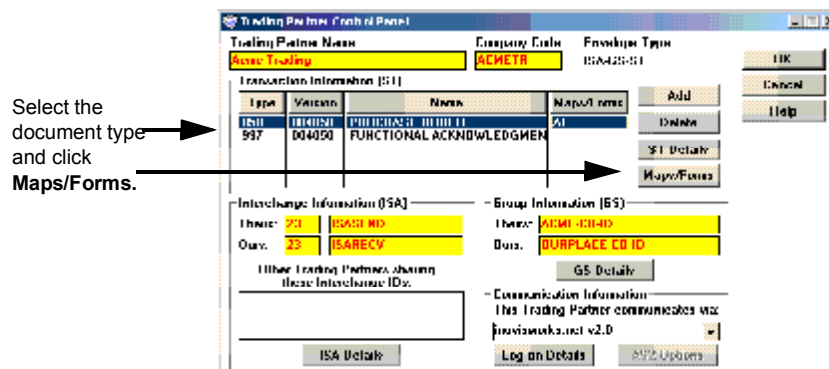
**Note:** If you just completed “Defining Outgoing Document Types for a Trading Partner” on page 42, go to step 5 of this procedure.

### To assign a Forms Overlay or map for a trading partner



- 1 Click **Start > Programs > Invois > TrustedLink > TrustedLink Administration**.
- 2 Click **Trading Partners**.
- 3 Select the trading partner name and click **Edit**.

The Trading Partner Control Panel opens.



- 4 Select the document type and click **Maps/Forms**.

The Map and Forms Assignments or Assign Overlays and Maps window displays.

- 5 Click the down arrow next to the Forms Overlay or map type, and select the form or map you want to assign to the document type.

The name of the document type you selected, such as 997—Functional Acknowledgement.

Type of form, such as data entry or print overlay.

The screenshot shows a window titled 'Map and Forms Assignments'. It has several fields: 'Type: 997 FUNCTIONAL ACKNOWLEDGEMENT', 'Data Entry Overlay', 'Print Overlay', 'Application to EDI File Map', 'EDI to Application File Map', 'Document Turnaround', 'Instruction Listing Format', 'Output Format', and 'Turnaround Map Used'. A dropdown menu is open next to the 'Type' field, showing a list of document types. An arrow points from the text 'Type of form, such as data entry or print overlay.' to the 'Data Entry Overlay' field. Another arrow points from the text 'The name of the document type you selected, such as 997—Functional Acknowledgement.' to the 'Type' field. A third arrow points from the text 'Click a down-arrow and select the form you want to assign to the document type for the trading partner.' to the dropdown menu.

Click a down-arrow and select the form you want to assign to the document type for the trading partner.

**Note:** To cancel a selection, select the blank line at the top of the list.

**Note:** On Forms Overlays and Document Turnaround Maps provided by Inovis, the last six characters of the name indicate the date the item was updated. If you have more than one version of the same item, select the one with the latest date.

- 6 Click **OK**.

The form assignment displays in the Maps/Forms column for each document type.

The screenshot shows a window titled 'Trading Partner Control Panel'. It has fields for 'Trading Partner Name' (Acme Trading), 'Company Code' (00600000), and 'Envelope Type' (ISA 1351). Below these is a table with columns 'Type', 'Version', 'Name', and 'Maps/Forms'. The table contains two rows: one for '000' and '004010' with 'PURCHASE ORDER' and 'AC', and another for '997' and '004010' with 'FUNCTIONAL ACKNOWLEDGEMENT' and 'AC'. An arrow points from the text 'See "Legend for Maps and Forms" on page 45.' to the 'Maps/Forms' column.

See "Legend for Maps and Forms" on page 45.

- 7 To complete the forms assignment, click **OK** on the Trading Partner Control Panel. You can view all forms in the **Forms** folder, which is under the **Support Folder** in TrustedLink Operations.

**Legend for Maps and Forms**

D	Data Entry Overlay
P	Print Overlay
T	Document Turnaround Map
A	Application to EDI File Map
E	EDI to Application File Map



# Managing Trading Partners

# 3

**I**n TrustedLink Windows, the term *trading partner* has two meanings, which are described below:

- An entity, such as a company, plant, store, government agency, or organization, with which you exchange e-Commerce documents. A trading partner can either supply products to your company or purchase products from your company.
- A collection of information, settings, map and form assignments, and other information about a specific trading partner. Called a *trading partner definition*, the information enables TrustedLink Windows to process the documents you exchange with the trading partner. Each entity with which you exchange e-Commerce documents must have a trading partner definition.

**Important:** You perform all trading partner configuration and file merging operations at the main TrustedLink Windows installation. Remote User Interface users cannot manage trading partners.

- “Creating a New Trading Partner Definition” on page 47
- “Working with Document Types” on page 49
- “Copying an Existing Trading Partner” on page 53
- “Editing a Trading Partner” on page 55
- “Setting up AS2 Options for a Trading Partner” on page 61
- “Trading Partner Definition Window Reference” on page 65

## Creating a New Trading Partner Definition

The easiest way to create a trading partner definition is to receive an e-Commerce document from your trading partner. Except for AS2 trading partners, TrustedLink Windows automatically creates the definition based on the received document. The trading partner does the work of ensuring the document complies with their requirements. See “Sending and Receiving Documents”.

**Note:** AS2 trading partners must be defined in TrustedLink Windows before you can exchange documents. If any trading partner cannot send a document for testing, you must add a trading partner definition before you send documents.

- “Multiple Trading Partner Definitions for a Company” on page 48
- “When to Add a Trading Partner Definition” on page 48
- “Creating a Trading Partner” on page 49

### Multiple Trading Partner Definitions for a Company

If you trade with multiple divisions within a company and the divisions have different sender and receiver IDs, then you must create a separate definition for each division.

#### EXAMPLES

- A company uses different IDs for testing e-Commerce documents than it does for production. You must create one trading partner definition for testing and one for production.
- A company's accounts payable department uses different IDs than its purchasing department. One trading partner definition is required for incoming purchase orders, and another for outgoing invoices.
- A manufacturing company has many locations, and each location handles ordering and billing using its own IDs. Because you receive orders from several locations, you must create a separate definition for each location.
- A retail chain has centralized ordering and billing, but you ship to many locations. This company uses the same sender and receiver IDs for all documents, so you only need one trading partner definition. One trading partner definition can include many ship-to addresses.

If you are not sure if your trading partner uses different sender and receiver IDs for different divisions, contact them for assistance. See also "Copying an Existing Trading Partner" on page 53.

### When to Add a Trading Partner Definition

Add a new trading partner definition if you have not received any documents from the trading partner.

#### To see a list of trading partners on your system

Perform the appropriate action, either:



- In TrustedLink Windows Operations, click **Utilities > Trading Partner List**.
- In TrustedLink Windows Administration, click **Trading Partners**.

#### Before You Begin

When you create a trading partner, you must supply the following information:

- Trading partner name
 

The name can be anything you choose. This name is used only within TrustedLink Windows. Your trading partner does not see it. In most cases, the name can be up to 80 characters. If you process documents for this trading partner using EDI-to-flat file or flat file-to-EDI mapping, the name must be 12 characters or less.
- Log-on (network) to use for communicating with this trading partner
- E-Commerce standard (ANSI ASC X12, or UN/EDIFACT) and the envelope structure to be used
- Test or production ("live") mode for e-Commerce documents
- Interchange Qualifiers and IDs, and Functional Group IDs, for both your company and the trading partner



- E-Commerce document types (such as purchase orders, invoices, shipping schedules) you exchange with a trading partner

You can get this information from your trading partner's e-Commerce specifications, your e-Commerce coordinator, or your trading partner. Except for the standard version and envelope structure, you can modify the information later.

### Creating a Trading Partner

#### To create a new trading partner definition

- 1 Click **Start > Programs > Invois > TrustedLink Windows > TrustedLink Windows Administration**.



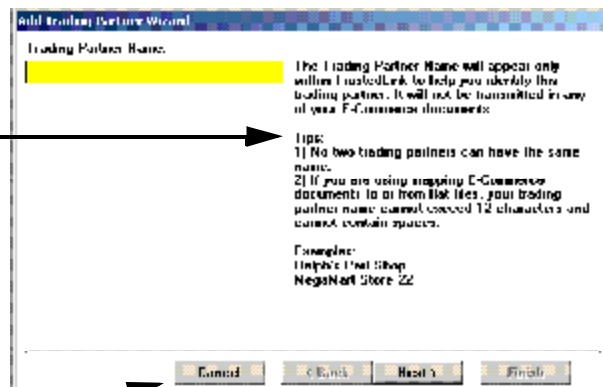
- 2 Click **Trading Partners**.

The Trading Partners window opens.

- 3 Click **Add**.

The Add Trading Partner Wizard opens.

The wizard provides additional tips.



Click **Cancel** to close the wizard without creating or saving a trading partner.

Click **Back** to return to the previous panel.

Click **Next** to go to the next panel.

- 4 Supply the information requested on each panel, and click **Next**.
- 5 To add document types, select the Add Document check box on the Review Trading Partner Information panel, and click **Next**.

The Select Documents window opens. See “Adding Document Types” on page 50.

- 6 Click **Finish** to create the trading partner definition.

The Trading Partners window opens, and the new trading partner is listed.

### Working with Document Types

All e-Commerce document types (such as purchase orders, invoices, or shipping schedules) exchanged with a trading partner, whether incoming or outgoing, must be defined in the trading partner definition.

You can define document types in several ways:

Method	Description
Receive a document from your trading partner.	Applies only to incoming document types. This is the easiest method because TrustedLink Windows automatically adds the document type to the trading partner definition. The trading partner ensures the document complies with its requirements. See "Sending and Receiving Documents" on page 95.
Add document types when creating a trading partner definition.	See "Creating a Trading Partner" on page 49.
Add document types to an existing trading partner definition.	See "Adding Document Types" on page 50.
Copy document types from an existing trading partner.	See "Copying an Existing Trading Partner" on page 53.

- "Before You Begin" on page 50
- "Adding Document Types" on page 50
- "Assigning Forms and Maps to Trading Partner Documents" on page 51

### Before You Begin

Before adding a document type, determine which document types you and your trading partner will exchange.

E-Commerce standards identify document types with a code. The codes are called a **transaction set** in the ANSI ASC X12 standard. They are called **message ID code** in the UN/EDIFACT standard.

#### EXAMPLE

For an ANSI ASC X12 transaction, the document type for a purchase order is 850. For a UN/EDIFACT message., the document type for a purchase order is ORDERS.

### Adding Document Types

The process of adding a document type is the same whether you perform it as you create the trading partner definition, or at a later date.

#### To add a document type

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.

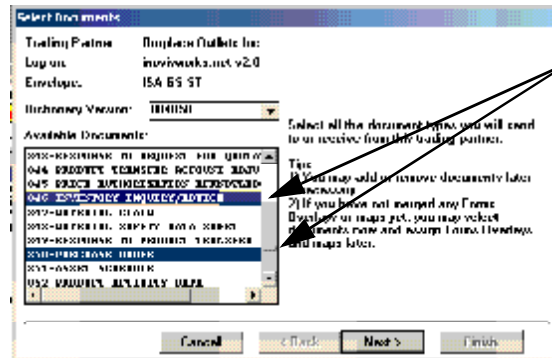
The Trading Partner window opens.

- 3 Select the trading partner and click **Edit**.

The Trading Partner Control Panel for that trading partner opens.

- 4 In the Transaction Information or Message Information area, click **Add**.

The Select Documents window opens.



Hint: To select multiple document types, press the **Ctrl** key and select the document types.

- 5 Select one or more document types you plan to send to the trading partner from the list. Click **Next**.

The Assign Overlays and Maps window opens.

- 6 Click **Finish**, or go to “Assigning Forms and Maps to Trading Partner Documents” on page 51.

### Assigning Forms and Maps to Trading Partner Documents

Before sending or receiving documents in a production environment, you must assign one or more forms or maps to **each document type** you plan to exchange with a trading partner. Forms help you create, print, and transform incoming documents into outgoing documents. Maps allow you to integrate data into your back-end applications.

The type of Forms Overlays or maps you assign to a document depends on:

- Whether the document is incoming or outgoing
- The method you use to process or prepare it.

See Chapter 6, “Processing Incoming Documents,” or Chapter 7, “Preparing Outgoing Documents,” to determine the specific Forms Overlays and maps required for each of your documents.

You can assign forms and maps when you add a document type, or at a later date. See also “Accessing all Forms on Your Computer” on page 53 and “Accessing all Application/EDI Maps on Your Computer” on page 53.

#### To assign a Forms Overlay or map

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.
- 2 Click **Trading Partners**.
- 3 Select the trading partner name and click **Edit**.



The Trading Partner Control Panel opens.

- 4 Select the document type and click **Maps/Forms**.

The Map and Forms Assignments or Assign Overlays and Maps window displays.

**Note:** If the document type is not displayed, see “Adding Document Types” on page 50.

- 5 Click the down arrow next to the Forms Overlay or map type, and select the data entry or print form you want to assign to the document type.

The name of the document type you selected, such as 997-Functional Acknowledgement.

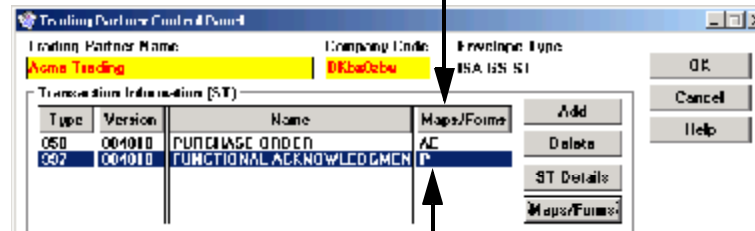
**Note:** To cancel a selection, select the blank line at the top of the list.

Click a down-arrow and select the form you want to assign to the document type for the trading partner.

**Note:** If the forms overlay or map is not displayed in the dropdown, see “Merging Forms, Log-ons, and Maps” on page 31. On Forms Overlays and Document Turnaround Maps provided by Inovis, the last six characters of the name indicate the date the item was updated. If you have more than one version of the same item, select the one with the latest date.

**6 Click OK.**

The form assignment displays in the Maps/Forms column for each document type.



See "Legend for Maps and Forms".

**7 To complete the forms assignment, click OK on the Trading Partner Control Panel.****Legend for Maps and Forms**

- D Data Entry Overlay
- P Print Overlay
- T Document Turnaround Map
- A Application to EDI File Map
- E EDI to Application File Map

**Accessing all Forms on Your Computer****To see a list of all the Forms Overlays on your system**

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Operations**.
- 2 Select **Forms** under **Support Folders** in the left pane.

**Accessing all Application/EDI Maps on Your Computer****To see a list of Application to EDI and EDI to Application File Maps**

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Operations**.
- 2 Select **Maps** under **Support Folders** in the left pane.

**Copying an Existing Trading Partner**

You can copy information from an existing trading partner when you create a new one. This option saves time if you need to create several trading partners that are similar (for example, different divisions of the same company).

You can copy...	In situation where:
Interchange information.	You are creating multiple trading partners with the same interchange IDs.
Document types, with or without Forms Overlay and map assignments.	You want to use the same document types as an existing trading partner.



- The Select Documents window opens. See “Adding Document Types” on page 50.

After you create a trading partner definition, you do not need to change it often.

- “Renaming a Trading Partner” on page 57

When you start exchanging e-Commerce documents, your trading partner might ask you to correct fields in your envelope segments to comply with their requirements.

Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.

- 

To edit fields in the ST or UNH segment, click **Details**.

To edit fields in the ISA or UNB segment, click **ISA Details**.

To edit fields in the GS or UNG segment, click **GS Details**.

For detailed information, see “Trading Partner Definition Window Reference” on page 65.

### Changing Forms Overlay and Map Assignments

You might receive new Forms Overlays or maps or receive updated versions of those you already have. After you merge these items into TrustedLink Windows, they must be assigned to the appropriate trading partners and documents.

**Note:** For merge instructions, see “Merging Forms, Log-ons, and Maps” on page 31.

#### To add or update an assignment

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.

- 3 Select the trading partner and click **Edit**.

The Trading Partner Control Panel opens.

- 4 Select the document type for which you want to change the assignment, and click **Maps/Forms**.

- 5 Use the dropdown to change the form or map assignments.

- 6 Click **OK**.

### Entering Log-on Attributes

Some networks require trading partner-specific or even document-specific information beyond that contained in the envelope segments. Each Detail window in the trading partner definition (Interchange, Group, and Transaction or Message) has an Attributes button for entering trading partner information required during communication. These buttons are only available if attributes are required.

**Note:** See the Log-on instruction booklet to determine which attributes are required and what values to enter.

#### To enter or change a Log-on attribute value

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.

- 3 Select the trading partner and click **Edit**.

The Trading Partner Control Panel opens.

- 4 In the Interchange, Group, or Transaction/Message area, click **Details**.

- 5 Click **Attributes**.

The Trading Partner Profile Attributes window opens.

- 6 Select the attribute.

- 7 In the Value box at the bottom of the window, type the new value.

- 8 Click **Update**.

The new value is shown beside the attribute.



### Renaming a Trading Partner

Trading partner names can be up to 80 characters. If you process documents for a trading partner using EDI-to-flat file or flat file-to-EDI mapping, the trading partner name must be 12 characters or less.

**Note:** If you see the New Trading Partner name in your In box, TrustedLink Windows automatically created a new trading partner when it received the trading partner's first document. You have the option of changing this name to something that helps you identify the trading partner. The name is used only within TrustedLink Windows. Your trading partner does not see it.

#### To change a trading partner name

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.

- 3 Select the trading partner and click **Edit**.

The Trading Partner Control Panel opens.

- 4 Type a new name in the Trading Partner Name field.

- 5 Click **OK**.

**Important:** The name associated with interchanges is different from the trading partner name. The interchange name appears on the Interchange Profile window in the trading partner definition, and on the Interchanges tab of the Properties Sheet on the Operations window. Normally the interchange name is not used in daily operations. If you rename the trading partner, the interchange name does not change.

### Changing the Company Code

If you use either the Part Cross-Reference or Accums features, Inovis recommends you change the Company Code to something recognizable. These two functions use the Company Code instead of the trading partner name to identify trading partners. The Company Code is limited to eight characters.

#### To change the Company Code

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.

- 3 Select the trading partner and click **Edit**.

The Trading Partner Control Panel opens.

- 4 Type the new code in the Company Code field.

**Note:** You can also change the code on the Interchange Profile, which you access by clicking **ISA Details** on the Trading Partner Control Panel.

If any trading partners are listed under "Other trading partners sharing these interchange IDs" on the Trading Partner Control Panel, the Company Code change applies to these trading partners.

Separators are unique characters used to separate elements in an e-Commerce document. They can be any character not used in content of the document, such as a tilde (~) or an asterisk (\*).

Your trading partner might require specific characters for separators, component element separators, and segment terminators.

- “Identifying Separators” on page 58
- “Defining Separators and Terminators” on page 58
- “Changing Separators and Terminators” on page 59

The graphic shows separators in an e-Commerce document.

Tildes (~) are the Segment Terminators

You use hexadecimal codes to define separators for a trading partner. For example, the hexadecimal code for a tilde (~) is 7E; the hexadecimal code for an asterisk (\*) is 2A. An

This column lists the hexadecimal code.

Based on the chart, the hexadecimal code for the tilde (~) is **7E**.

Dec	Hex	Char
112	70	p
113	71	q
114	72	r
115	73	s
116	74	t
117	75	u
118	76	v
119	77	w
120	78	x
121	79	Y
122	7A	z
123	7B	{
124	7C	
125	7D	}
126	7E	~
127	7F	

## To change separators and terminators

- 

The Trading Partner Control Panel opens.



- 4** In the Interchange Information (ISA) section, click **ISA Details**.

The X12 Interchange Profile window opens. Use the EDI Separators portion of the screen to define EDI separators for the trading partner. The values you enter will be in hexadecimal code.

The screenshot shows the 'X12 Interchange Profile' window. It has several sections:
 

- Profile Name:** HCM GPS, HCMC INT
- Company Code:** Streamline Hub
- Interchange IDs:** Includes fields for Name (ZZ), Org (HCH), and Org (HCHC).
- Standard Information:** Includes Interchange Standard ID (U) and Interchange Version (U0000).
- EDI Separators:** This section is highlighted with an arrow. It contains:
  - Element Separator: 0A
  - Component Element Separator: 0F
  - Segment Terminator: 0E

 Buttons for OK, Cancel, Attributes..., Security, and Help are on the right.

Separators are defined in hexadecimal code.

**5 Click ASCII Chart.**

The ASCII Chart opens. Use the Hex and Char columns in this chart to determine the hexadecimal values for the separator you want to use.

The screenshot shows the 'ASCII Chart' window. It displays a grid of hexadecimal values (Hex) and their corresponding characters (Char). The grid is organized into rows and columns, allowing users to find the hexadecimal value for a specific character or vice versa. The '0A' value is visible in the grid.

**6 Click Close.**

**7 In the EDI Separators area, type the code in the appropriate field.**

**8 To save the changes, click OK.**

**Viewing and Printing Trading Partner Reports**

You can view and print trading partner information in a report for reference or hard-copy storage.

**To view or print a report**

**1 Click Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration.**



**2 Click Trading Partners.**

**3 Select the trading partner name.**

**4 Click Reports.**

**Loading Pattern Reports**

**Report Options**

- ☒ List of all Loading Patterns
- ☐ Summary: HMA GPES
- ☐ Summary of all LP
- ☐ Details: HMA GPES
- ☐ Details of all LP

**Buttons:** Close, Print, Help

**Result**

- WLBTEST\_KING
- WTV\_GPES
- WCK\_GPES\_20
- WLR\_INSTR\_7
- WGL\_GPES
- WGL\_INSTR\_7
- WGL\_DIFFER\_75
- WGL\_DIFFER\_9
- WLBTEST\_KING
- WLBTRN\_CONTOUR
- WLBTRN\_DEPTH
- WTV
- WTV\_DEPTH

To see this information...	Select this option:
All trading partners on your system	List of all Trading Partners
Log-on, IDs, and document types for the selected trading partner	Summary
All trading partner definition information for the selected trading partner	Details



PDF created with pdfFactory trial version [www.pdffactory.com](http://www.pdffactory.com)

The Trading Partners list opens.

- 3 Select the AS2 trading partner, and click **Edit**.

The Trading Partner Control Panel opens.

- 4 In the Communication Information area, verify the TLW AS2 v1.0 Log-on is selected.

- 5 Click **AS2 Options**.

The AS2 Options window opens.

- 6 Type or select the information for the AS2 trading partner.

Field	Description
Their Sending AS2 Identifier	AS2 identifier that uniquely identifies the trading partner in AS2 messages. This value is used in the header when a message is sent to the trading partner over AS2.
Signing Certificate	Signing certificate received from your trading partner. When you receive a "signed" message from the trading partner, this certificate verifies the digital signature is from that trading partner. Go to step 7 on page 62.
Their Receiving AS2 Identifier	AS2 identifier that uniquely identifies the trading partner in AS2 messages. This value is used in to look up the trading partner when an AS2 message is received.
Encryption Certificate	Encryption certificate received from your trading partner. When you send a message to your trading partner, this certificate encrypts the message. After it has been encrypted, the message can only be decrypted by that trading partner. Go to step 7 on page 62.
Their AS2 URL	URL to which AS2 messages will be sent. Example: http://mrma:9080/msgsrv/as2 if the server host name of the trading partner is mrma.

- 7 Select or add the signing/encryption certificates.

The certificates must be stored on your local computer.

If you want to...	Do this...
Select a certificate	<ol style="list-style-type: none"> <li>1 Click the <b>Ellipsis (...)</b> button.</li> <li>2 Select the certificate.</li> <li>3 Click <b>OK</b>.</li> </ol>
Add a certificate	<ol style="list-style-type: none"> <li>1 Click the <b>Ellipsis (...)</b> button.</li> <li>2 Click <b>Add Certificate</b>.</li> <li>3 In Certificate Name, type a description of the certificate.</li> <li>4 Click <b>Browse</b> to navigate to the certificate's location.</li> <li>5 Select the certificate and click <b>Open</b>.</li> <li>6 Click <b>OK</b> twice to return to the AS2 Configuration window.</li> </ol>

8 Click **OK**.

### Defining Optional AS2 Settings

Use BizConnect to configure optional AS2 settings for a trading partner. You access BizConnect from TrustedLink Windows.

**Important:** Do not change the administrator user ID and password referenced in this procedure. If you change these values, TrustedLink Windows will not be able to access BizConnect.

### To access BizConnect from TrustedLink Windows

1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



2 Click **Trading Partners**.

The Trading Partners list opens.

3 Select the AS2 trading partner name, and click **Edit**.

The Trading Partner Control Panel opens.

4 In the Communication Information area, click **AS2 Options**.

The AS2 Options window opens.

Click **Advanced** to access trading partner information in BizConnect.

5 Click **Advanced**.

The BizManager/BizConnect logon screen opens.

6 Type the administrator user ID and password (**admin/admin**), and click **Log On**.

7 Click the **Parties** tab.

8 Under the **External Trading Partners** tab, select the trading partner.

9 Click **User's Guide** or **Help** to access the BizConnect documentation.

### Importing an AS2 Trading Partner Profile

If an AS2 trading partner sends a profile created in any BizManager product, you can import the file to create a new trading partner definition in TrustedLink Windows.

**Note:** The file must be stored on your local computer.

#### To import a AS2 trading partner profile into TrustedLink Windows

1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.

2 Click **Tools > Import AS2 Trading Partner**.

The Import AS2 Trading Partner window opens.

3 Perform the appropriate action, either:

- Type the path to the file on your local computer, and click **Import**, or
- Click **Browse**, navigate to the file, select it, click **Open**, and click **Import**.

The Add Trading Partner Wizard opens.

4 Use the wizard to add the trading partner to TrustedLink Windows (see “Creating a New Trading Partner Definition” on page 47).

A message indicates the trading partner was imported and added successfully.

5 Click **Close**.

### Linking and Unlinking AS2 Trading Partners

If you already have trading partners defined in both TrustedLink Windows and BizConnect, you can use TrustedLink Windows to link those definitions. TrustedLink Windows uses the AS2 identifier to associate the trading party in TrustedLink Windows with the corresponding trading party in BizConnect.

■ “Linking AS2 Trading Partners” on page 64

■ “Unlinking AS2 Trading Partners” on page 65

#### Linking AS2 Trading Partners

You can link an existing TrustedLink Windows trading partner to an existing BizConnect trading partner.

#### To link existing AS2 trading partners

1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



2 Click **Trading Partners**.

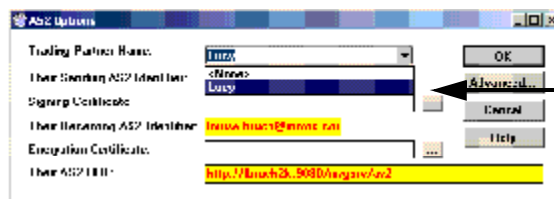
3 Select the AS2 trading partner, and click **Edit**.

4 In the Communication Information area of the Trading Partner Control panel, ensure the TLW AS2 v1.0 Log-on is selected.

5 Click **AS2 Options**.



The AS2 Options window opens.



Use the Trading Partner Name dropdown to select the BizConnect trading partner you want to link to the TrustedLink Windows trading partner.

- 6 In the Trading Partner Name dropdown, select the BizConnect trading partner you want to link to the TrustedLink Windows trading partner.

- 7 Click **OK**.

### Unlinking AS2 Trading Partners

You can unlink TrustedLink Windows and BizConnect trading partners that are currently linked.

#### To unlink AS2 trading partners

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.

- 3 Select the AS2 trading partner, and click **Edit**.

- 4 In the Communication Information area of the Trading Partner Control panel, ensure the TLW AS2 v1.0 Log-on is selected.

- 5 Click **AS2 Options**.

The AS2 Options window opens.



In the Trading Partner Name dropdown, select **<None>** to unlink BizConnect and TrustedLink Windows trading partners.

- 6 In the Trading Partner Name dropdown, select **<None>** to unlink the trading partners.

- 7 Click **OK**.

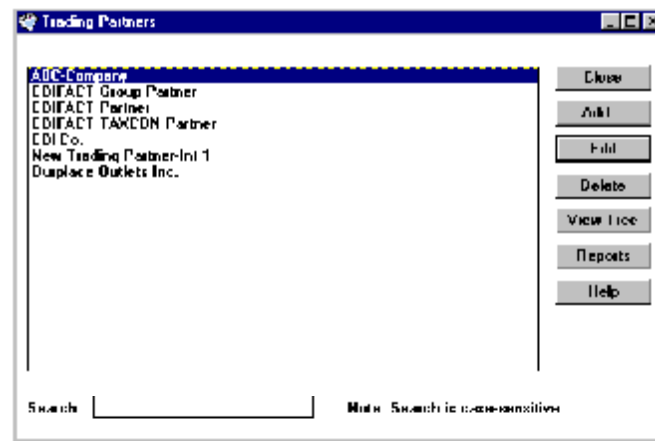
## Trading Partner Definition Window Reference

This section describes all fields and buttons on the trading partner management , including: Trading Partner Control Panel, Transaction or Message Definition, Functional Group Profile, and Interchange Profile

- “Trading Partners Window” on page 66
- “X12 Trading Partner Definitions” on page 66
- “EDIFACT Trading Partner Definition Windows” on page 82

## Trading Partners Window

Your trading partners are listed in the Trading Partners window. You can add, edit, and delete trading partners, as well as see more information about them.



### To open the Trading Partners window

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.

The Trading Partner window opens.

Field or Button	Description
List of trading partners	Trading partner names. These names are also listed on the Trading Partner Control Panel. <b>Note:</b> If you see a New Trading Partner name, it means TrustedLink Windows automatically created the trading partner when it received the first document. See “Renaming a Trading Partner” on page 57.
<b>Add</b> button	Starts the Add Trading Partner Wizard for creating a new trading partner definition.
<b>Edit</b> button	Opens the Trading Partner Control Panel for the selected trading partner.
<b>Delete</b> button	Deletes the selected trading partner.
<b>View Tree</b> button	Shows the selected trading partner definition in hierarchical view (Log-on, Interchange, Functional Group, and Document levels).
<b>Reports</b> button	Opens the Trading Partner Reports window for viewing and printing trading partner definition details.
Search	Type characters in this field to find a trading partner name in a long list. As you type, the highlight moves to the matching name. <b>Note:</b> Search is case-sensitive.

## X12 Trading Partner Definitions

The Trading Partner Control Panel displays the information most often needed in the trading partner definition. The Details buttons provide access to the entire trading partner definition.

**Note:** Yellow fields with red text indicate mandatory fields, which you cannot leave blank.

### To display the Trading Partner Control Panel

- 1 Click **Start > Programs > Invois > TrustedLink Windows > TrustedLink Windows Administration**.
- 2 Click **Trading Partners**.
- 3 Select a trading partner and click **Edit**.
- 4 The Trading Partner Control Panel opens.



The Trading Partner Control Panel shows high-level information for the trading partner.

Trading Partner Control Panel

Trading Partner Name: **Barclays Bank PLC** Company Code: **000001** Envelope Type: **ISA GS ST**

Transaction Information (ST)

Type	Version	Name	Name/Format	Action
001	000000	000000	001	Detail
002	000000	000000	002	Detail
003	000000	000000	003	Detail
004	000000	000000	004	Detail
005	000000	000000	005	Detail
006	000000	000000	006	Detail
007	000000	000000	007	Detail
008	000000	000000	008	Detail
009	000000	000000	009	Detail
010	000000	000000	010	Detail

Interchange Information (ISA)

Index: **00** Value: **5576543210**

Unit: **00** Value: **0000000000**

Group Information (GS)

Index: **00** Value: **5576543210**

Unit: **00** Value: **0000000000**

Communication Information

This Trading Partner communicates via:

www.barclays.co.uk v2.0

Buttons: **Detail** **Cancel** **Help**

Click the Detail buttons to access transaction, interchange, group, and communications information.

- “X12 Trading Partner Control Panel Fields” on page 68
- “X12 Transaction Information (ST) Area” on page 68
  - “X12 Transaction Definition (ST)” on page 69
- “X12 Group Information (GS) Area” on page 72
  - “X12 Functional Group Profile (GS)” on page 72
  - “X12 Interchange Profile (GS-ST)” on page 75
- “X12 Interchange Information (ISA) Area” on page 77
  - “X12 Interchange Profile (ISA)” on page 77
- “X12 Communication Information Area” on page 81

### X12 Trading Partner Control Panel Fields

The top row of the Trading Partner Control Panel has three fields: Trading Partner Name, Company Code, and Envelope Type.

Use these fields to specify the Trading Partner Name and Company Code. The Envelope Type is listed for reference only.

Field	Description
Trading Partner Name	The name used throughout TrustedLink Windows to identify this trading partner. It is not sent with your e-Commerce documents.
Company Code	Created automatically when a new trading partner is added. You can change the code to something recognizable, up to eight characters. Used to identify the trading partner in the Part Cross-Reference and Accums tables.
Envelope Type	The envelope structure this trading partner uses. Shown for reference only; you cannot change it.

### X12 Transaction Information (ST) Area

On the Trading Partner Control Panel, all document types either sent to or received from a trading partner must be listed in the Transaction Information (ST) area.

The Transaction Information (ST) area lists all document types sent to or received from the trading partner.

Field or Button	Description
Type, Version, Name	Standard dictionary identification of this document.
Maps/Forms column	Types of Forms Overlays and maps assigned to this document: <ul style="list-style-type: none"> <li>■ D—Data Entry Overlay</li> <li>■ P—Print Overlay</li> <li>■ T—Document Turnaround Map</li> <li>■ A—Application to EDI File Map</li> <li>■ E—EDI to Application File Map</li> </ul>
Add button	Click to define a new document type for this trading partner. Starts the Add Transaction Wizard.
Delete button	Click to delete the document from this trading partner.
ST Details button	Opens the Transaction Definition for the selected document.
Maps/Forms button	Opens the Map and Forms Assignments for the selected document.

### X12 Transaction Definition (ST)

You define transaction wrap (ST) segment information for a document type in the X12 Transaction Definition window, together with document-level TrustedLink Windows control options.

#### To display the X12 Transaction Definition

- 1 Click **Start > Programs > Invois > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.

- 3 Select a trading partner and click **Edit**.

The Trading Partner Control Panel opens.

- 4 Click **ST Details**.

Click **ST Details** to access X12 transaction definitions for a document type.

The X12 Transaction Definition window opens.

Field or Button	Segment/ Element ID	Description
Transaction Code	ST01	The dictionary-defined transaction code for this document type.
<b>Standards Information</b>		
Version/ Release	GS08	Version/Release Indicator Code. Default: 003050
Functional ID	GS01	Functional ID Code.
Responsible Agency	GS07	Responsible Agency Code. Default: X
<b>ISA Overrides</b>		
Authorization Qualifier	ISA01	If present, replaces the value shown on the Interchange Profile for this transaction only.
Authorization Information	ISA02	If present, replaces the value shown on the Interchange Profile for this transaction only.
Security Qualifier	ISA03	If present, replaces the value shown on the Interchange Profile for this transaction only.
Security Information	ISA04	If present, replaces the value shown on the Interchange Profile for this transaction only.
Agency	ISA11	If present, replaces the Interchange Standards ID value shown on the Interchange Profile for this transaction only.
Version ID	ISA12	If present, replaces the value shown on the Interchange Profile for this transaction only.
<b>Acknowledgments</b>		

Field or Button	Segment/ Element ID	Description
Acknowledgments	Not Applicable	Applicable to <i>incoming</i> documents only. Determines whether acknowledgments (997s) are sent when you receive this document. Set according to your trading partner's requirements: <ul style="list-style-type: none"> <li>■ Always Send—Send for each document received.</li> <li>■ Never Send—Do not send for this document.</li> <li>■ Only Send on Error —Send only if a document contains an error.</li> </ul> Default: Always Send
Use STSECURITY	Not Applicable	Turns on encryption, decryption, and authentication of this document. Applicable only if TrustedLink Windows STSECURITY is installed, and security options are set for this trading partner and document.
<b>Transaction Set Control Numbers</b>		
Incoming	ST02	The last Transaction Set Control Number received; taken from the incoming data.
Verify (Incoming Control Numbers)	Not Applicable	If this box is checked, any break in the numerical sequence of incoming control numbers is reported in the Communications Report.
Outgoing	ST02	The last Transaction Set Control Number sent. This value increases each time a document is transmitted. It can be edited; for example, to correct a break in the sequence caused by a transmission error. To carry over control numbers from another system to TrustedLink Windows, type the last control number used in this field. Default: Starts at 0000
Format	Not Applicable	Determines how the outgoing Transaction Set Control Number is calculated: <ul style="list-style-type: none"> <li>■ Sequential—The next control number is the last control number plus one.</li> <li>■ TDCC—The control number is the last five digits of the Functional Group Control Number, plus a four-digit sequential number. This is the TDCC convention.</li> <li>■ Group —The control number is a continuous sequential number for each transaction in a group.</li> </ul> Default: Sequential
<b>Data Encoding</b>		
Source and Target	Not Applicable	Define a data encoding format for Source and Target documents used in Mapper mapping.
<b>Mapper Settings</b>		
Target Filename	Not Applicable	Define a target filename used in EDI to application file mapping with Mapper.





4 Click GS Details.

The screenshot shows the 'Trading Partner Control Panel' window. The 'Transaction Information (51)' table lists various transaction types and their versions. The 'Group Information (55)' section is highlighted, and an arrow points to the 'GS Details' button. The 'Interchange Information (ISA)' section is also visible, showing fields for 'Thems' and 'Yours'.

Click GS Details to define functional group (GS) wrap segments.

The X12 Functional Group window profile opens.

The screenshot shows the 'X12 Functional Group Profile' window. The 'Group Profile Name (i.e., document type)' field is highlighted. The 'Functional Group IDs' section shows 'Thems' and 'Yours' fields. The 'Groups Control Numbers' section shows 'Incoming' and 'Outgoing' fields.

Field or Button	Segment/ Element ID	Description
Group Profile Name	Not Applicable	This is the trading partner name used on the Trading Partner Control Panel, the Trading Partners list, and throughout TrustedLink Windows.
Use STSECURITY	Not Applicable	Turns on encryption, decryption, and authentication of functional groups to or from this trading partner. Applicable only if TrustedLink Windows STSECURITY is installed, and security options are set for this trading partner.
Supports Scanning	Not Applicable	Applicable if you use TrustedLink Windows Scan. Indicates bar code data is scanned for this trading partner.
<b>Functional Acknowledgments</b>		

Field or Button	Segment/ Element ID	Description
Send options	Not Applicable	<p>Applicable to <i>incoming</i> functional groups only. Determines whether functional acknowledgments (997s) are sent when you receive documents from this trading partner. Set according to your trading partner's requirements:</p> <ul style="list-style-type: none"> <li>■ Always Send—Send an acknowledgment for each functional group received.</li> <li>■ Never Send—Do not send functional acknowledgments to this trading partner.</li> <li>■ Only Send on Error—Send only if a functional group contains an error.</li> </ul> <p>Default: Always Send</p>
Receive options	Not Applicable	<p>Determines how functional acknowledgments of your outgoing documents are reported:</p> <ul style="list-style-type: none"> <li>■ Do Not Expect To Receive—If selected, acknowledged interchanges are reported on the Acknowledgment Reconciliation Report.</li> <li>■ Expect to Receive—If selected, unacknowledged interchanges are reported on the Acknowledgment Reconciliation Report.</li> </ul> <p>Default: Expect to Receive</p>
Agency	Not Applicable	<p>Use if your trading partner requires functional acknowledgments of a specific agency and version. Overrides the agency of the incoming document. If blank, the agency is the same as that of the incoming document.</p>
Version	Not Applicable	<p>Use if your trading partner requires functional acknowledgments of a specific agency and version. Overrides the version of the incoming document. If blank, the version is the same as that of the incoming document.</p>
<b>Functional Group IDs</b>		
Theirs	GS02 (incoming) GS03 (outgoing)	The unique Functional Group ID for this trading partner.
Ours	GS03 (incoming) )GS02 (outgoing)	The Functional Group ID that identifies you to this trading partner.
<b>Group Control Numbers</b>		
Incoming	GS06	The most recent Functional Group Control Number received; taken from the incoming data.
Verify (Incoming Group Control Numbers)	Not Applicable	If this box is checked, any break in the numerical sequence of incoming control numbers is reported in the Communications Report.

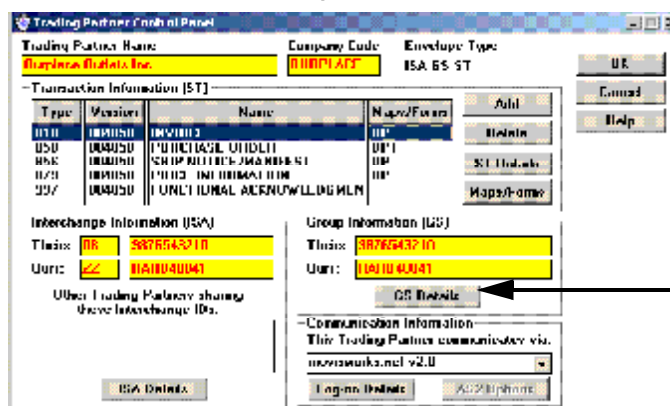
Field or Button	Segment/ Element ID	Description
Outgoing	GS06	<p>The last Functional Group Control Number sent.</p> <p>This value increases each time a functional group is transmitted.</p> <p>It can be edited; for example, to correct a break in the sequence caused by a transmission error.</p> <p>Default: Starts at 000000000</p>
<b>Attributes</b> button	Not Applicable	<p>Opens a dialog box for entering trading partner-specific information required during communications.</p> <p>If <b>Attributes</b> is unavailable, it means no attributes are required here.</p> <p>To determine what values to enter, refer to the instruction booklet for the Log-on assigned to this trading partner.</p>
<b>Security</b> button	Not Applicable	<p>Starts the Encryption Server so you can set up or change your security options (such as encryption keys and passwords) for this trading partner.</p> <p>If the optional TrustedLink Windows STSECURITY module is not installed on your system, this button is unavailable.</p>

## XI2 Interchange Profile (GS-ST)

This information applies only to trading partners whose envelope structure is defined as a group without interchange (GS-ST).

### To display the XI2 Interchange Profile

Click **GS Details** on the Trading Partner Control Panel.



Click **GS Details** to display the X12 interchange profile.

The X12 Interchange Profile opens.

**Note:** If this is not a GS-ST trading partner, this window is not available.

If the envelope structure of a trading partner is GS-ST, the Functional Group and Interchange Profiles are combined. See “X12 Functional Group Profile (GS)” on page 72 for the standard fields. These additional fields are included for GS-ST trading partners:

Field or Button	Segment/Element ID	Description
Company Code	Not Applicable	Created automatically when a new trading partner is added. Change the code to something recognizable, up to eight characters.  Used to identify the trading partner in the Part Cross-Reference and the Accums tables. Also shown on the Trading Partner Control Panel.
Scanning Hub	Not Applicable	Applicable if you use TrustedLink Windows Scan. Identifies the hub company for this trading partner.
Element Separator	Not Applicable	The hexadecimal code for the character used to separate elements.
Segment Terminator	Not Applicable	The hexadecimal code for the character used to indicate the end of a segment.
ASCII Chart	Not Applicable	Click to display a reference chart of ASCII characters and their decimal and hexadecimal codes.

### X12 Interchange Information (ISA) Area

On the Trading Partner Control Panel, the Interchange Information (ISA) area contains interchange information about you and your trading partner.

**Note:** If this is a GS-ST trading partner, the Interchange Information area is not available.

The Interchange Information (ISA) area contains interchange information about you and your trading partner.

Field or Button	Description
Theirs	Your trading partner's Interchange Qualifier and ID. Edit this field here or by clicking <b>ISA Details</b> to access the Interchange Profile. See "X12 Interchange Profile (ISA)" on page 77.
Ours	Your Interchange Qualifier and ID. Edit this field here or by clicking <b>ISA Details</b> to access the Interchange Profile. See "X12 Interchange Profile (ISA)" on page 77.
Other Trading Partners sharing these Interchange IDs	Lists any other trading partners on your system whose interchange IDs are the same as this one. Some large companies with multiple divisions use the same Interchange IDs for all divisions, although the Group IDs are different. <b>Important:</b> If you make any changes here or in the Interchange Profile, your changes apply to all trading partners listed.
ISA Details button	Opens the Interchange Profile for this trading partner.

### X12 Interchange Profile (ISA)

You define Interchange (ISA) wrap segment information on the X12 Interchange Profile window, together with interchange-level TrustedLink Windows control options.

#### To display the X12 Interchange Profile

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.
- 3 Select a trading partner and click **Edit**.

The Trading Partner Control Panel opens.

4 Click ISA Details.

Click ISA Details to define interchange wrap segment information.

**Important:** If any trading partners are listed in the “Other Trading Partners sharing these Interchange IDs” section, any changes you make in the Interchange Profile apply to these trading partners as well.

The X12 Interchange Profile window opens.

Field or Button	Segment/ Element ID	Description
Profile Name	Not Applicable	The trading partner name associated with interchanges for this trading partner. This might be different from the trading partner name. You can change this name if necessary.
Company Code	Not Applicable	Created automatically when a new trading partner is added. Change the code to something recognizable, up to eight characters. Used to identify the trading partner in the Part Cross-Reference and the Accums tables. Also shown on the Trading Partner Control Panel.
Scanning Hub	Not Applicable	Applicable if you use TrustedLink Windows Scan. Identifies the hub company for this trading partner.
<b>Interchange IDs</b>		

Field or Button	Segment/ Element ID	Description
Theirs Qualifier	ISA05 (incoming) ISA07 (outgoing)	Your trading partner's Interchange ID Qualifier.
Theirs ID	ISA06 (incoming) ISA08 (outgoing)	Your trading partner's Interchange ID.
Ours Qualifier	ISA07 (incoming) ISA05 (outgoing)	Your Interchange ID Qualifier.
Ours ID	ISA08 (incoming) ISA06 (outgoing)	The Interchange ID that identifies you to this trading partner.
<b>Standards Information</b>		
Interchange Standards ID	ISA11	Interchange Standards ID. Default: U
Interchange Version	ISA12	Usually the first five digits of the Functional Group Version. For example, if the Functional Group Version is 3020 (which is entered as 003020), the Interchange Version is usually 00302. Default: 00200
<b>Interchange Control Numbers</b>		
Incoming	ISA13	The most recent Interchange Control Number received; taken from the incoming data.
Verify (Incoming Interchange Control Numbers)	Not Applicable	If this box is checked, any break in the numerical sequence of incoming control numbers is reported in the Communications Report.
Outgoing	ISA13	The last Interchange Control Number sent. This value increases each time an interchange is transmitted. It can be edited; for example, to correct a break in the sequence caused by a transmission error. Default: Starts at 000000000
Use STSECURITY	Not Applicable	Turns on encryption, decryption, and authentication of interchanges to or from this trading partner. Applicable only if TrustedLink Windows STSECURITY is installed, and security options are set for this trading partner.
Test/Production	ISA15	Select Test or Production mode. Default: Test
<b>Interchange Acknowledgments</b>		

Field or Button	Segment/ Element ID	Description
Send options	Not Applicable	<p>Applicable to <i>incoming</i> interchanges only. Determines whether acknowledgments (TAIs) are sent when you receive interchanges from this trading partner. Set according to your trading partner's requirements:</p> <ul style="list-style-type: none"> <li>■ Only Send if Requested—Send only if the interchange contained a request for acknowledgment.</li> <li>■ Always Send— Send for each interchange received.</li> <li>■ Never Send—Do not send interchange acknowledgments to this trading partner.</li> <li>■ Only Send on Error—Send only if an interchange contains an error.</li> <li>■ Only Send on Error or if Requested—Combines these options.</li> </ul> <p>Default: Only Send if Requested</p>
Receive options	ISA14	<p>Determines how acknowledgments of your outgoing interchanges are reported:</p> <ul style="list-style-type: none"> <li>■ Do Not Expect To Receive—If selected, acknowledged interchanges are reported on the Acknowledgment Reconciliation Report.</li> <li>■ Expect to Receive—If selected, unacknowledged interchanges are reported on the Acknowledgment Reconciliation Report.</li> </ul> <p>Default: Do Not Expect to Receive</p>
<b>Authorization and Security</b>		
Authorization Qualifier	ISA01	Authorization Information Qualifier. Default: 00
Authorization Information	ISA02	Authorization Information.
Security Qualifier	ISA03	Security Information Qualifier. Default: 00
Security Information	ISA04	Security Information.
<b>EDI Separators</b>		
Element Separator	Third to last char. in ISA segment; position 104	The hexadecimal code for the character used to indicate the end of an element. Default: 7E (~)
Component Element Separator	ISA16	The hexadecimal code for the character used to indicate the end of a component (used with component elements only). Default: 3C (<)
Segment Terminator	Last char. in ISA segment; position 106	The hexadecimal code for the character used to indicate the end of a segment. Default: 27 (!)



Field or Button	Segment/ Element ID	Description
Repetition Separator	Not Applicable	The hexadecimal code for the character used to separate repeated occurrences of a simple data element or composite data structure.  Important: This character must be different from the data element separator, component element separator, and segment terminator.
ASCII Chart button	Not Applicable	Click to display a reference chart of ASCII characters and their decimal and hexadecimal codes.
Attributes button	Not Applicable	Opens a dialog box for entering trading partner-specific information required during communications.  If the <b>Attributes</b> button is unavailable, it means no attributes are required here.  To determine what values to enter, refer to the instruction booklet for the Log-on assigned to this trading partner.
Security button	Not Applicable	Starts the TrustedLink Windows Encryption Server so you can set up or change your security options (such as encryption keys and passwords) for this trading partner.  If the optional TrustedLink Windows STSECURITY module is not installed on your system, this button is unavailable.

## X12 Communication Information Area

On the Trading Partner Control Panel, use the Communication Information area to select and modify Log-on information and, if applicable, define AS2 options for a trading partner.

Use the Communication Information area to select and modify Log-on information and define AS2 options.

Field or Button	Description
This Trading Partner communicates via:	Shows the Log-on (network) used to communicate with this trading partner.  <b>Important:</b> You can click the down arrow and select a different Log-on, but this is rarely necessary. You can seriously disrupt your communications if done in error.
Log-on Details button	Opens the Edit Log-on Variables window for this Log-on.
AS2 Options button	If the TLW AS2 v1.0 Log-on is selected for the trading partner, opens the AS2 Options window.

## EDIFACT Trading Partner Definition Windows

The Trading Partner Control Panel displays the information most often needed in the trading partner definition. The Details buttons provide access to the entire trading partner definition.

**Note:** Yellow fields with red text indicate mandatory fields, which you cannot leave blank.

### To display the Trading Partner Control Panel

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.
- 3 Select a trading partner and click **Edit**.

The Trading Partner Control Panel opens.

The Trading Partner Control Panel shows high-level information for the trading partner.

The screenshot shows the 'Trading Partner Control Panel' window. It contains several sections: 'Trading Partner Name' (with a red 'Details' button), 'Company Code' (with a red 'Details' button), and 'Envelope Type' (set to UNB UNH). Below these are three main sections: 'Message Information (UNH)', 'Interchange Information (UNB)', and 'Group Information (UNG)'. Each section has a 'Details' button. Arrows from the text below point to these 'Details' buttons.

Click the **Detail** buttons to access the complete trading partner definition.

- “EDIFACT Trading Partner Control Panel Fields” on page 83
- “EDIFACT Message Information (UNH) Area” on page 84
  - “EDIFACT Message Definition (UNH)” on page 84
- “EDIFACT Group Information (UNG) Area” on page 87
  - “EDIFACT Group Profile (UNG)” on page 87
- “EDIFACT Interchange Information (UNB) Area” on page 90
  - “EDIFACT Interchange Profile (UNB)” on page 90
- “EDIFACT Communication Information Area” on page 94

### EDIFACT Trading Partner Control Panel Fields

The top row of the Trading Partner Control Panel has three fields: Trading Partner Name, Company Code, and Envelope Type.

Use these fields to specify the Trading Partner Name and Company Code. The Envelope Type is listed for reference only.

Field	Description
Trading Partner Name	The name used throughout TrustedLink Windows to identify this trading partner. It is not sent with your e-Commerce documents.
Company Code	Created automatically when a new trading partner is added. You can change the code to something recognizable, up to eight characters. Used to identify the trading partner in the Part Cross-Reference and Accum tables.
Envelope Type	The envelope structure this trading partner uses. Shown for reference only; you cannot change it.

## EDIFACT Message Information (UNH) Area

On the Trading Partner Control Panel, use the Message Information (UNH) area to list all document types either sent to or received from this trading partner.

The Message Information (UNH) area lists all document types sent or received from the trading partner.

Field or Button	Description
Type, Version, Name	Standard dictionary identification of this document.
Maps/Forms column	Lists the types of Forms Overlays and maps assigned to this document: <ul style="list-style-type: none"> <li>■ D—Data Entry Overlay</li> <li>■ P—Print Overlay</li> <li>■ T—Document Turnaround Map</li> <li>■ A—Application to EDI File Map</li> <li>■ E—EDI to Application File Map</li> </ul>
Add	Click to define a new document type for this trading partner. Starts the Add Transaction Wizard.
Delete	Click to delete the document from this trading partner definition.
UNH Details button	Opens the Message Definition for the selected document.
Maps/Forms button	Opens the Map and Forms Assignments for the selected document.

## EDIFACT Message Definition (UNH)

You define Message (UNH) wrap segment information on the EDIFACT Message Definition window, together with document-level TrustedLink Windows control options.

### To display the trading partner Message Definition

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.
- 3 Select a trading partner and click **Edit**.  
The Trading Partner Control Panel opens.

4 Click UNH Details.

Click UNH Details to define information about the message (UNH) wrap segment.

The EDIFACT Message Definition window opens.

Field or Button	Segment/ Element ID	Description
Message Type	UNH02:01	The dictionary-defined message code for this document type.
<b>Standards Information</b>		
Version	UNH02:02	Message version number. Default: D
Release	UNH02:03	Message release number. Default: 97A
Assoc. Assigned Code	UNH02:05	Association Assigned Code.
Controlling Agency	UNH02:04	Controlling Agency. Default: UN
<b>Interchange Overrides</b>		
Security Qualifier	UNB06:02	If present, replaces the value shown on the Interchange Profile for this message only.
Password	UNB06:01	If present, replaces the value shown on the Interchange Profile for this message only.

Field or Button	Segment/ Element ID	Description
Comms. Agreement ID	UNB10	If present, replaces the value shown on the Interchange Profile for this message only.
Application Reference	UNB07	If present, replaces the value shown on the Interchange Profile for this message only.
Processing Priority Code	UNB08	If present, replaces the value shown on the Interchange Profile for this message only.
<b>Acknowledgments</b>		
Acknowledg- ments	Not Applicable	<p>Applicable to <i>incoming</i> documents only. Determines whether acknowledgments (CONTRLs) are sent when you receive this document.</p> <p>Set according to your trading partner's requirements:</p> <ul style="list-style-type: none"> <li>■ Always Send—Send for each document received.</li> <li>■ Never Send—Do not send for this document.</li> <li>■ Only Send on Error—Send only if a document contains an error.</li> </ul> <p>Default: Always Send</p>
Use STSECURITY	Not Applicable	<p>Turns on encryption, decryption, and authentication of this document.</p> <p>Applicable only if TrustedLink Windows STSECURITY is installed, and security options are set for this trading partner and document.</p>
<b>Message Reference Numbers</b>		
Incoming	UNH01	The last Message Reference Number received; taken from the incoming data.
Verify (Incoming Message Reference Numbers)	Not Applicable	If this box is checked, any break in the numerical sequence of incoming reference numbers is reported in the Communications Report.
Outgoing	UNH01	<p>The last Message Reference Number sent.</p> <p>This value increases each time a document is transmitted. It can be edited; for example, to correct a break in the sequence caused by a transmission error.</p> <p>To carry over reference numbers from another system to TrustedLink Windows, type the last reference number in this field.</p> <p>Default: Starts at 00000000000000</p>
<b>Data Encoding</b>		
Source and Target	Not Applicable	Define a data encoding format for Source and Target documents used in Mapper mapping.
<b>Mapper Settings</b>		
Target filename	Not Applicable	Define a target filename used in EDI to application file mapping with Mapper.

### EDIFACT Group Information (UNG) Area

On the Trading Partner Control Panel, use the Group Information area to define group information for this trading partner

**Note:** If this is a UNB-UNH trading partner, this area is not available.

Use the Group Information area to define group information for the trading partner.

Field or Button	Description
Theirs	Your trading partner's Group ID. Edit this field here or by clicking <b>Details</b> to access the Group Profile.
Ours	Your Group ID. Edit this field here or by clicking <b>Details</b> to access the Group Profile.
<b>UNG Details</b> button	Opens the Group Profile for this trading partner.

### EDIFACT Group Profile (UNG)

You define Group (UNG) segment information on the EDIFACT Group Profile window, together with group-level TrustedLink Windows control options.

#### To display the EDIFACT Group Profile

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.

- 3 Select a trading partner and click **Edit**.

The Trading Partner Control Panel opens.

4 Click UNG Details.

Click UNG Details to define information about the group (UNG) wrap segment.

The EDIFACT Group Profile window opens.

**Note:** If this is a UNB-UNH trading partner, this window is not available.

Field or Button	Segment/ Element ID	Description
Profile Name	Not Applicable	This is the trading partner name used on the Trading Partner Control Panel, the Trading Partners list, and throughout TrustedLink Windows.
Use STSECURITY	Not Applicable	Turns on encryption, decryption, and authentication of functional groups to or from this trading partner. Applicable only if TrustedLink Windows STSECURITY is installed, and security options are set for this trading partner.
<b>Group Acknowledgments</b>		
Group Acknowledg- ments	Not Applicable	Applicable to <i>incoming</i> groups only. Determines whether group acknowledgments are sent when you receive documents from this trading partner. Set according to your trading partner's requirements: <ul style="list-style-type: none"> <li>Always Send—Send an acknowledgment for each group received.</li> <li>Never Send—Do not send group acknowledgments to this trading partner.</li> <li>Only Send on Error—Send only if a group contains an error.</li> </ul> Default: Always Send
<b>Security</b>		



Field or Button	Segment/ Element ID	Description
Application Password	UNG08	Application Password.
<b>Group IDs</b>		
Ours Qualifier	UNG03:02 (incoming) UNG02:02 (outgoing)	Your Group ID qualifier.
Ours ID	UNG03:01 (incoming) UNG02:01 (outgoing)	The Group ID that identifies you to this trading partner.
Theirs Qualifier	UNG02:02 (incoming) UNG03:02 (outgoing)	Your trading partner's Group ID qualifier.
Theirs ID	UNG02:01 (incoming) UNG03:01 (outgoing)	Your trading partner's Group ID.
<b>Group Reference Numbers</b>		
Incoming	UNG05	The most recent Group Reference Number received; taken from the incoming data.
Verify (Incoming Group Reference Numbers)	Not Applicable	If this box is checked, any break in the numerical sequence of incoming reference numbers is reported in the Communications Report.
Outgoing	UNG05	The last Group Reference Number sent. This value increases each time a group is transmitted. It can be edited; for example, to correct a break in the sequence caused by a transmission error. Default: Starts at 00000000000000

### EDIFACT Interchange Information (UNB) Area

On the Trading Partner Control Panel, use the Interchange Information (UNB) area to define interchange information.

Use the Interchange Information (UNB) area to define interchange information for you and your trading partner.

Field or Button	Description
Theirs	Your trading partner's Interchange Qualifier and ID. Edit this field here or by clicking <b>UNB Details</b> to access the Interchange Profile. See "EDIFACT Interchange Profile (UNB)" on page 90.
Ours	Your Interchange Qualifier and ID. Edit this field here or by clicking <b>UNB Details</b> to access the Interchange Profile. See "EDIFACT Interchange Profile (UNB)" on page 90.
Other Trading Partners sharing these Interchange IDs	Lists any other trading partners on your system whose interchange IDs are the same as this one. Some large companies with multiple divisions use the same Interchange IDs for all divisions, although the Group IDs are different. <b>Note:</b> If you make any changes here or in the Interchange Profile, your changes apply to all trading partners listed.
UNB Details button	Opens the Interchange Profile for this trading partner.

### EDIFACT Interchange Profile (UNB)

You define Interchange (UNB) wrap segment information on the EDIFACT Interchange Profile window, together with interchange-level TrustedLink Windows control options.

#### To display the EDIFACT Interchange Profile

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Trading Partners**.
- 3 Select a trading partner and click **Edit**.  
The Trading Partner Control Panel opens.

4 Click UNB Details.

Trading Partner Control Panel

Trading Partner Name: DeMar Ltd. Company Code: DCMAN Forwarding Type: UNB UNH

Message Information (UNH)

Type	Version	Message Name	Maps/Forms
DELFOI	D.99D	DELIVERY SCHEDULE MESSAGE	DP
INVOIC	D.99D	INVOICE MESSAGE	DP
ORDER	D.99B	PURCHASE ORDER MESSAGE	DP

Interchange Information (UNB)

Thru: A12F0041210  
From: TARI

Other Trading Partners sharing these Interchange IDs:

UNB Details

Group Information

Thru:   
From:   
Details

Communication Information

This Trading Partner communicates via:   
interlinka net v2.11   
Language Details   
AS2 Options

**Important:** If any trading partners are listed in the “Other Trading Partners sharing these Interchange IDs” section, any changes you make in the Interchange Profile apply to these trading partners as well.

The EDIFACT Interchange Profile window opens.

EDIFACT Interchange Profile

Profile Name: TEST Trading Partner... Company Code: TTMNTRG

Use S1 Security: ☐ Test / Production: ☒ Test ☐ Production

Interchange IDs

Thru: TARI ID:   
From: 122418-20   
Thru Routing ID:   
From Routing ID:   
Special Characters

Element Sequence: 20   
Component Element Sequence: 1A   
Segment Terminator: 7/   
Release Character: 3-   
Universal Mark: 2C   
☐ Force UNA Creation   
AS2 ID Card

Interchange Control Numbers

Incoming: 00000000000000 ☐ Verify   
Outgoing: 00000000000000

Outgoing Detail

Security Qualifier:   
Security Protocol:   
Application Reference:   
Priority Code:   
Comm. Agreement ID:   
Syntax ID: UNQA Version: 3

OK   
Cancel   
Attributes...   
Security   
Help

Field or Button	Segment/Element ID	Description
Profile Name	Not Applicable	The trading partner name, also used on the Trading Partner Control Panel, the Trading Partners list, and throughout TrustedLink Windows.  Exception: If this is a UNB-UNG-UNH trading partner, the Group Profile name is used.
Company Code	Not Applicable	Created automatically when a new trading partner is added. Change the code to something recognizable, up to eight characters.  Used to identify the trading partner in the Part Cross-Reference and the Accums tables. Also shown on the Trading Partner Control Panel.

Field or Button	Segment/ Element ID	Description
Use STSECURITY	Not Applicable	Turns on encryption, decryption, and authentication of interchanges to or from this trading partner.  Applicable only if TrustedLink Windows STSECURITY is installed, and security options are set for this trading partner.
<b>Interchange IDs</b>		
Ours Qualifier	UNB03:02 (incoming) UNB02:02 (outgoing)	Your Identification Code Qualifier.
Ours ID	UNB03:01 (incoming) UNB02:01 (outgoing)	The Interchange ID that identifies you to this trading partner.
Theirs Qualifier	UNB02:02 (incoming) UNB03:02 (outgoing)	Your trading partner's identification Code Qualifier.
Theirs ID	UNB02:01 (incoming) UNB03:01 (outgoing)	The trading partner's Interchange ID code.
Their Routing ID	UNB03:03	The trading partner's routing address.
Our Routing ID	UNB02:03	Address for reverse routing.
<b>Test/Production</b>		
Test/Production	UNB11	Select Test or Production mode.  Default: Test
<b>Interchange Acknowledgments</b>		
Send options	Not Applicable	Applicable to <i>incoming</i> interchanges only. Determines whether acknowledgments (CONTRLs) are sent when you receive interchanges from this trading partner. Set according to your trading partner's requirements: <ul style="list-style-type: none"> <li>■ Only Send if Requested—Send only if the interchange contained a request for acknowledgment.</li> <li>■ Always Send—Send for each interchange received.</li> <li>■ Never Send—Do not send interchange acknowledgments to this trading partner.</li> <li>■ Only Send on Error—Send only if an interchange contains an error.</li> <li>■ Only Send on Error or if Requested—Combines these options.</li> </ul> Default: Only Send if Requested

Field or Button	Segment/ Element ID	Description
Receive options	UNB09	<p>Determines how acknowledgments of your outgoing interchanges are reported:</p> <ul style="list-style-type: none"> <li>■ Do Not Expect To Receive—If selected, acknowledged interchanges are reported on the Acknowledgment Reconciliation Report.</li> <li>■ Expect to Receive—If selected, unacknowledged interchanges are reported on the Acknowledgment Reconciliation Report.</li> </ul> <p>Default: Do Not Expect to Receive</p>
<b>Interchange Control Numbers</b>		
Incoming	UNB05	The most recent Interchange Control Number received; taken from the incoming data.
Verify Incoming Interchange Control Numbers	Not Applicable	If this box is checked, any break in the numerical sequence of incoming reference numbers is reported in the Communications Report.
Outgoing	UNB05	<p>The last Group Control Number sent.</p> <p>This value increases each time an interchange is transmitted.</p> <p>It can be edited; for example, to correct a break in the sequence caused by a transmission error.</p> <p>Default: Starts at 00000000000000</p>
<b>Special Characters</b>		
Element Separator	UNA02	<p>The hexadecimal code for the character used to indicate the end of an element.</p> <p>Default: 2B (+)</p>
Component Element Separator	UNA01	<p>The hexadecimal code for the character used to indicate the end of a component (used with component elements only).</p> <p>Default: 3A (:)</p>
Segment Terminator	UNA06	<p>The hexadecimal code for the character used to indicate the end of a segment.</p> <p>Default: 27 (')</p>
Release Character	UNA04	<p>The hexadecimal code for the character used to indicate the next character is literal and not a separator.</p> <p>Default: 3F (?)</p>
Decimal Mark	UNA03	<p>Use 2E for a period (.) or 2C for a comma (,).</p> <p>Default: 2E</p>
Force UNA Creation	Not Applicable	If checked, a UNA segment is always sent before a UNB segment.
ASCII Chart button	Not Applicable	Click to display a reference chart of ASCII characters and their decimal and hexadecimal codes.
<b>Outgoing Detail</b>		
Security Qualifier	UNB06:02	Recipient's Reference/Password Qualifier.
Security Password	UNB06:01	Recipient's Reference/Password.
Application Reference	UNB07	Application Reference.

Field or Button	Segment/ Element ID	Description
Priority Code	UNB08	Processing Priority Code.
Comm. Agreement ID	UNB10	Communications Agreement ID.
<b>Syntax</b>		
Syntax ID	UNB01:01	Syntax ID. Default: UNOA
Syntax Version	UNB01:02	Syntax Version. Default: 3

### EDIFACT Communication Information Area

On the Trading Partner Control Panel, use the Communication Information area to select and modify Log-on and AS2 information.

Use the Communication Information area to select and modify Log-On information and define AS2 options for a trading partner.

Field or Button	Description
This Trading Partner communicates via:	Shows the Log-on (network) used to communicate with this trading partner. <b>Important:</b> You can click the down arrow and select a different Log-on, but this is rarely necessary. You can seriously disrupt your communications if done in error.
Log-on Details button	Opens the Edit Log-on Variables window for this Log-on.
AS2 Options button	If the TLW AS2 v1.0 Log-on is selected, opens the AS2 Options window for the trading partner.

**T**his chapter covers the following topics:

- “Communications” on page 95
- “Sending and Receiving Documents” on page 95
- “Resending Interchanges” on page 97
- “Resending Documents” on page 97
- “Resolving Failed AS2 Documents” on page 98
- “Verifying and Changing Network Passwords” on page 98
- “Communications Session Reports” on page 99
- “Configuring Log-on Information” on page 101

## Communications

*Communications* refers to the actual transmission (sending and receiving) of e-Commerce documents and other information. TrustedLink Windows must be running when you perform communications from the Remote User Interface.

To perform communications in TrustedLink Windows, you established the following during installation:

- Account with a network (Inovisworks, Get2Connect.net, direct connect, or ISP)
- Internet connection
- Log-on merged and configured

If you exchange documents with your trading partners directly through a trading network, you have set up a modem and phone line for the direct connection.

**Note:** When multiple TrustedLink Windows or Remote User Interface users send or receive documents at the same time, only one communications session starts. An alert dialog box advises other users a problem has been encountered. Users can refer to the Communications Result window to see communications are in progress.

## Sending and Receiving Documents

Sending and receiving e-Commerce documents are the most common communications operations.

### **Sending**

When you select a Send operation, TrustedLink Windows sends all documents that:

- Are located in the Out folder
- Are addressed to trading partners using the active Log-on
- Have a status of Queued or Re-queued

Documents in other folders (including any subfolders you created in the Out folder) are not sent. Documents in the Out folder addressed to other trading partners are not sent. Selecting documents in the document list has no effect on whether or not those documents are sent.

Documents that are sent successfully are moved to the Sent folder.

### **Receiving**

When you select a Receive operation, all documents in your mailbox on the network are downloaded to TrustedLink Windows. Exception: on some networks you can specify which documents to receive; for example, by trading partner or by batch ID. Check your Log-on instructions for details.

### **Sending and Receiving Electronic Documents**

- 1 To send or receive electronic documents

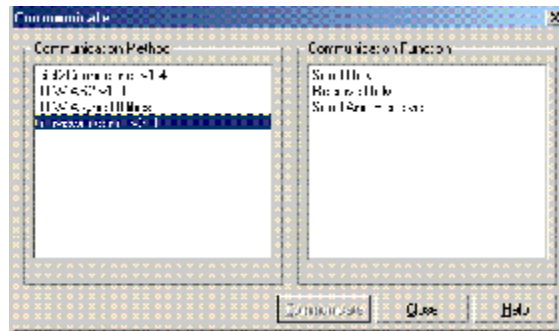


- 2 On the Operations window, click **Communicate**.

The Communicate window opens.

- 3 In the Communication Method pane, select the Log-on to use.

The available communication functions for the selected Log-on are listed in the Communication Function pane.



- 4 Select a Communications Function and click **Communicate**.

The following process occurs:

- The Results window displays the progress of the communications session.
- If you are using Inoivisworks, the Inoivisworks window is also displayed.
- E-Commerce documents that were sent are placed in the Sent folder.
- E-Commerce documents that were received are placed in the In folder.
- Text documents and network messages that were received are placed in the Text Documents folder.



- A new Trading Partner Definition is created if one does not exist.

**Important:** After you send e-Commerce documents, they remain in your Sent folder until you remove them. See Chapter 9, “Advanced Document Management,” for information about deleting and archiving documents.

#### To troubleshoot a failed communications session

If the communications session failed, check the following:

- Log-on ID, password, and phone number (if applicable) are correct
- Modem or Internet connection is set up correctly

#### Results Window

Full details of each communications session, including the number of documents sent or received and the associated trading partner(s), are displayed in the Results window during and immediately after the communications session.

While the Results window is displayed, you can view, save, or print the information.

#### To save or print the report

Click the **Results** menu and select an option.

## Resending Interchanges

#### To resend an interchange because of a transmission errors (or any reason)

- 1 On the Operations window, select the **Sent** folder.

The documents you sent in previous sessions are shown in the document list.

- 2 Select any document in the interchange to resend. (See “Interchanges” on page 195 for information about interchanges.)



- 3 If the Properties Sheet is not visible, click **Properties Sheet** to display it.

- 4 Click the Hierarchy tab in the Properties sheet.

- 5 Right-click anywhere in the hierarchy and select **Re-queue**.

The interchange is moved to the Out folder and requeued for transmission.

- 6 Perform another communications session to resend the interchange. See “Sending and Receiving Documents” on page 95.

## Resending Documents

#### To resend documents because of a transmission error (or any reason)

- 1 On the Operations window, select the **Sent** folder.

The documents you have sent in previous sessions display in the document list.

- 2 Right-click any documents in the interchange you want to resend, then select **Send to**.

**Note:** For information about interchanges, see “Interchanges” on page 195.

- 3 Select the **Out** folder.

- 4 Select either **Copy** or **Move** to move the documents to the **Out** folder.

- 5 Click **OK**, select **Yes** to perform the operation, then click **OK**.
- 6 Perform another communications session to resend the documents. See “Sending and Receiving Documents” on page 95.

## Resolving Failed AS2 Documents

### To resolve AS2 document transmission errors (Failed MDN Processing)

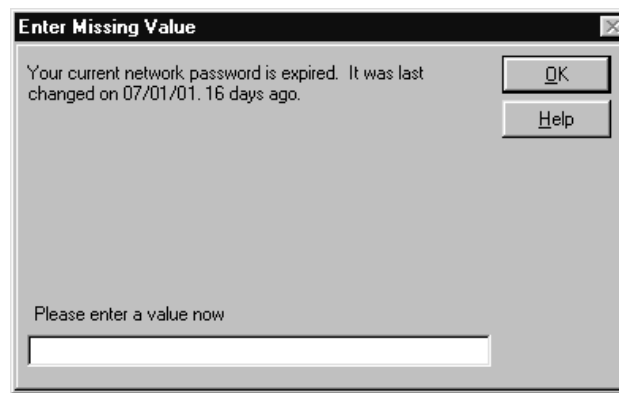
- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Operations**.

**Note:** On the Remote User Interface computer, click **Start > Programs > Inovis > TrustedLink WindowsRUI > TrustedLink Windows Operations**.

- 2 Click **View > Log Files** to access the TrustedLink Windows Log Files.
- 3 Find the failed AS2 document and view the log file details to determine the cause of the failure (see “Viewing a Log File” on page 229 and “AS2 Error Messages in Log Files” on page 229).
- 4 After determining the cause of the failure, either:
  - Resend the document to the trading partner (see “Resending Documents” on page 97).
  - Contact your trading partner and request they resolve the issue and resend the document to you.

## Verifying and Changing Network Passwords

Some networks require you change your password regularly. If you use a network with this requirement and attempt communication with an expired password, the following message alerts you:



Type a new password and click **OK** to continue the communications session.

### Verifying Network Password Requirements

If a network requires a password change, the change interval (the number of days a password is valid) is automatically set in the Log-on. When you change the password, the change date is automatically recorded.

Follow this procedure to:

- Determine if your network requires a regular password change,
- Check the change interval, or
- Verify the date the password was last changed.

#### To verify network password requirements

- 1 Click **Start > Programs > Inovis > TrustedLink Windows Administration**, or in **Operations** click **Go > Administration**.



- 2 Click **Log-ons**.

The Log-ons window opens.

- 3 Select the Log-on and click **Variables**.

The window opens.

If the network requires a regular password change, the Password Change Required box is checked. The date the password was last changed and the change interval are shown.

### Changing your Password

#### To change your network password or be reminded before it expires

- 1 Click **Start > Programs > Inovis > TrustedLink Windows Administration**, or select **Administration** from the **Go** menu in **Operations**.



- 2 Click **Log-ons**.

The Log-ons window opens.

- 3 Select the Log-on and click **Variables**.

The window opens.

- 4 In the Script Variable column, select the New Password variable and click **Edit**.

The window opens.

- 5 Type a new password in the Value box and click **OK**.

The window displays the new password. Your password is changed on the network during your next communications session.

- 6 Check the Password Change Required box and set an interval. This is optional unless your Log-on requires it.

TrustedLink Windows reminds you to change your password before it expires.

## Communications Session Reports

In addition to the Results window report displayed during a communications session, the results of each communications session are logged and reported in four other ways:

- Comms Log tab on the Operations window
- Log file, accessible by using the Log File Viewer
- Communications Report
- Individual session documents

### Comms Log Tab

Communications sessions are reported on the Comms Log tab of the Properties Sheet. This log lists your most-recent communications activity, including the following details:

- Date
- Time
- Log-on used
- Communication function performed

#### To view the properties sheet on the Comms Log tab



- 1 If the Properties Sheet is not visible, click **Properties Sheet** to display it.
- 2 Click the Comms Log tab.

#### To clear the Comms Log list when it gets too long

Right-click an item in the list and select **Purge Comms Log**

The log information is deleted.

### Log File Viewer

After you close the Results window, you can access the same information through the Log File Viewer. For instructions, see “Reviewing Log Files” on page 228.

### Communications Report

The report contains the following information about each communications session:

- Date an event occurred
- Time the event occurred
- I/O indicates whether documents were sent (In) or received (Out)
- Trading partner name
- Level—envelope level (ISA, UNB, GS, UNG, ST, or UNH) of e-Commerce data sent or received
- Trans Code—document type code (such as 850 or ORDERS) of documents sent or received
- Ack Requested indicates whether an acknowledgment is expected (Yes) or not expected (No)
- Reference/Message:
  - Control/reference numbers of documents sent or received
  - Communication commands attempted
  - Communication status messages
  - Error messages

#### To view or print the Communications Report

- 1 Click **Start > Programs > Inovis > TrustedLink Windows Administration**, or in **Operations**, click **Go > Administration**.
- 2 Select **Communications** from the **Reports** menu.

The Report Criteria Selection window opens.

- 3 To specify a time period for the events to report, enter the starting and ending dates in YYYYMMDD format.

If the date fields are blank, all communications data is reported.

- 4 Click **Report**.

The report is displayed in the Unattended Operations Report window.

- 5 Click **Print** to print the report.

- 6 Close the Report window.

The message, "Delete report data?" opens.

- 7 Select **No** or **Yes**:

- Items reported are retained, and are included again the next time you view the report.
- The displayed items are permanently removed from the report. This option is recommended because it keeps the report from becoming too large and helps reduce the time needed to display the report.

### Session Documents

The message information displayed in the Communications Report is also recorded in individual session documents.

#### To view and print individual session documents

- 1 On the Operations window, click **View > Session Documents**.

The Session Document Viewer lists session documents by date.

- 2 To view the contents of a session document, select the document.

The session document contents display in the right pane of the viewer.

- 3 To print a session document, select the document and click **Print**.

## Configuring Log-on Information

Before using a Log-on for the first time, you must enter basic information such as the phone number to call, and the user ID and password assigned to you by the network. Log-on instructions provide details about the information to enter for a network. Other than the password, you usually do not need to change this information again.

**Note:** If you plan to use the Inovisworks or Get2Connect.net log-ons provided with TrustedLink Windows, you do not need to edit the log-on.

- "Editing a Log-on" on page 101
- "Editing Advanced Log-on Properties" on page 102

### Editing a Log-on

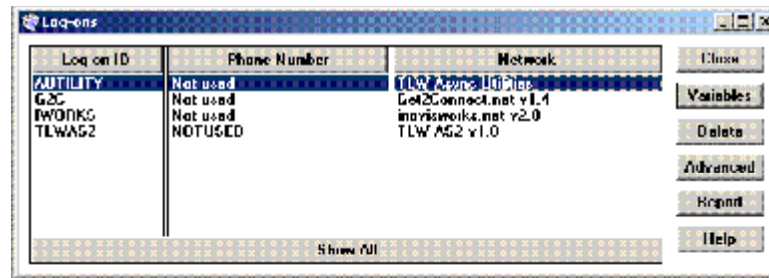
#### To edit a Log-on

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.



- 2 Click **Log-ons**.

The Log-ons window opens.



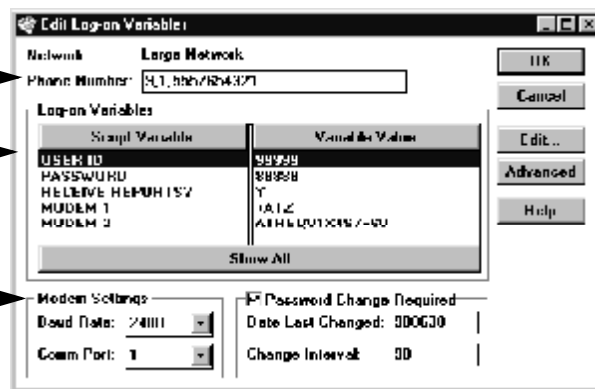
- 3 Select the Log-on and click **Variables**.

The window opens.

Edit the phone number here. See step 4.

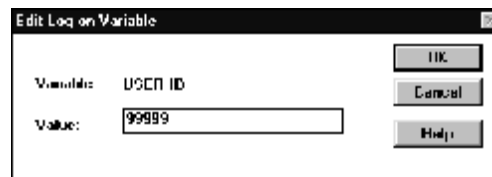
Edit variables here. See step 5.

Edit modem settings here. See step 7.



- 4 To change the phone number, type the new number in the Phone Number field. If a pause is needed to wait for an outside line dial tone, type a comma for the pause.
- 5 To change a Script Variable, select the variable and click **Edit**.

The Edit Log-on Variable dialog box displays the current value in the Value box.



- 6 Type the new value in the Value box and click **OK**.

The new value is shown in the Value column in the window.

- 7 To change the Baud Rate or Comm Port, select a new value from the dropdown.
- 8 Check the Password Change Required box and set an interval. This is optional unless your Log-on requires it.

TrustedLink Windows reminds you to change your password before it expires.

### Editing Advanced Log-on Properties

Additional communication information is available in the Edit Log-on Advanced Properties window. This information is pre-set for each Log-on, and usually does not change.

### To view the information

1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.

2 Click **Log-ons**.

The Log-ons window opens.

3 Click **Advanced**.

The Edit Log-on Advanced Properties window opens.

4 Modify the information as appropriate. See “Edit Log-on Advanced Properties Field Descriptions” on page 103.

### Edit Log-on Advanced Properties Field Descriptions

Field	Description
Data Bits	Either <b>7</b> or <b>8</b> , according to the network’s specifications.
Parity	<b>Odd</b> , <b>Even</b> , or <b>None</b> , according to the network’s specifications.
Stop Bits	<b>1</b> , <b>1.5</b> , or <b>2</b> , according to the network’s specifications.
Retransmit After Bad Session	Specifies what to do if a send operation fails due to a communications error: <ul style="list-style-type: none"> <li>■ <b>All</b>—Retransmit all interchanges in the failed session.</li> <li>■ <b>Failed</b>—Retransmit only the interchanges that were not transmitted during the failed session.</li> <li>■ <b>None</b>—Do not retransmit any interchanges in the failed session.</li> </ul>
Full Blocking Required	This box is checked if the network requires records of a specified length; shorter records are padded to the length specified in the Transmission Record Size field.
Blocking Character	If Full Blocking Required is checked, the character specified here is used to pad records.
Carriage Return/Line Feed Required	This box is checked if the network requires a carriage return/line feed character at the end of each line.
Override Segment Terminator	If the network specifies a character to be used as the segment terminator, that character is entered here. This character overrides the segment terminator character specified in the trading partner record for all trading partners that use this Log-on.

Field	Description
ASCII Chart	Click to display a reference chart of ASCII characters, including their decimal and hexadecimal codes.
Dial Time Out	The number of seconds the modem waits for a successful connection.
Default Time Out	Not used.
Repeat Limit	Bisync communications only. The number of times the modem resends a block of data if it receives no response from the other system.
Retransmit Limit	Bisync communications only. The number of times the modem retransmits the same bytes of data. During communications, if data is not received properly by the other system, a code is returned that tells the sending modem to "send that batch again." Ten to fifteen successive failures, for example, implies the data is bad or that the modem connection is unstable. Try again later.
Transmission Block Size	Bisync communications only. The maximum data block size. It must be a multiple of the Transmission Record Size.
Transmission Record Size	Bisync communications only. The maximum size of a record in the data, usually 80 characters.
Terminal Type	Bisync communications only. The interval between bids for the phone line. Primary terminals bid once per second, and secondary terminals bid once per three seconds. 1—Primary terminal 2—Secondary terminal



**U**se the TrustedLink® Operations window to perform most of your daily e-Commerce tasks.

- “Starting TrustedLink Windows or Remote User Interface Operations” on page 105  
Includes an overview of the main features of TrustedLink Windows Operations.
- “Finding Specific Documents” on page 107  
How to find documents stored in TrustedLink Windows.
- “Setting Preferences” on page 109  
Customizing TrustedLink Windows.
- “Customizing the Document List” on page 113  
How to control the information shown in your list of documents.
- “Operations Window Reference” on page 115  
Provides descriptions of all menu commands, toolbar buttons, folders, Properties Sheet displays, and keyboard shortcuts in TrustedLink Windows Operations.

**Note:** The Remote User Interface uses a subset of the TrustedLink Windows Operations window.

## Starting TrustedLink Windows or Remote User Interface Operations

This section is organized as follows:

- “Starting TrustedLink Windows Operations” on page 105
- “Starting TrustedLink Windows Remote User Interface Operations” on page 106
- “TrustedLink Windows Operations Window” on page 106
- “TrustedLink Windows Remote User Interface Operations Window” on page 106

### Starting TrustedLink Windows Operations

#### To start TrustedLink Windows Operations



Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Operations**.

The Operations window opens.

## Starting TrustedLink Windows Remote User Interface Operations

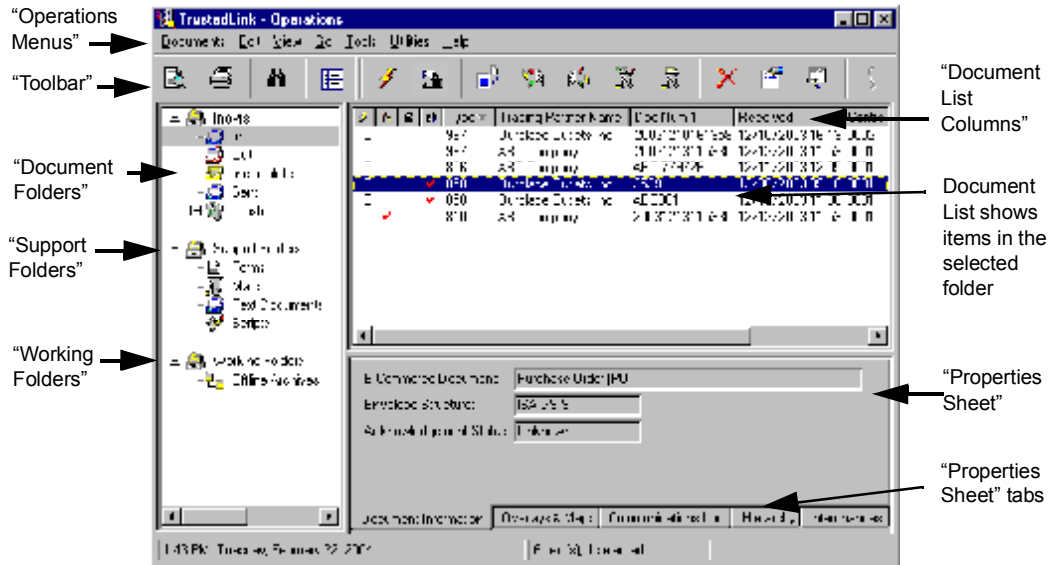
### To start TrustedLink Windows Remote User Interface Operations

Click **Start > Programs > Inovis > TrustedLink Windows RUI > TrustedLink Windows RUI Operations**.

The TrustedLink Windows Remote User Interface Operations window opens.

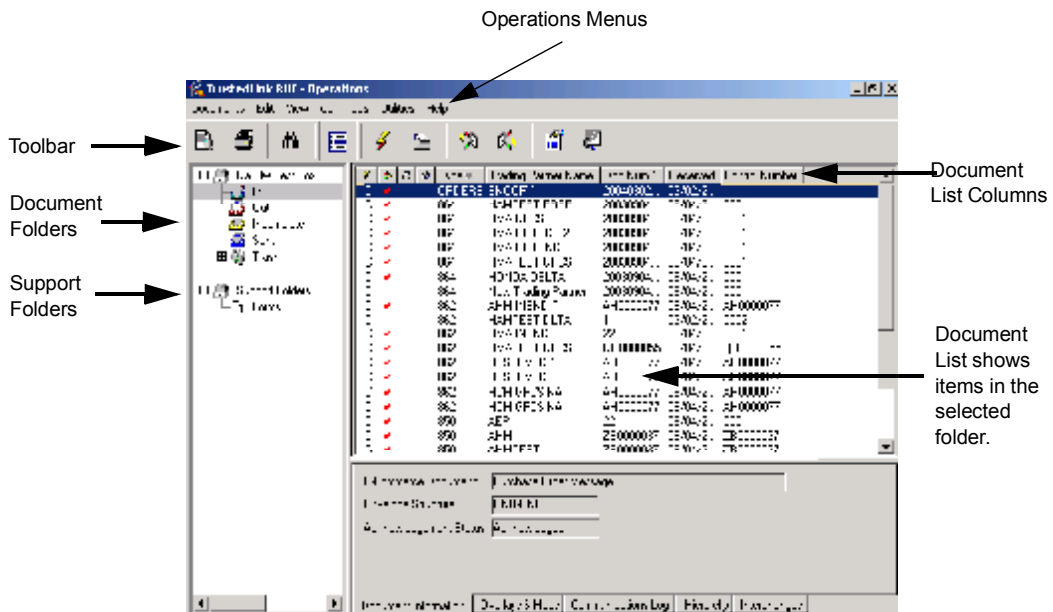
### TrustedLink Windows Operations Window

The individual items are detailed in "Operations Menu" on page 116.



### TrustedLink Windows Remote User Interface Operations Window

The individual items are detailed in "Operations Menu" on page 116.



## Finding Specific Documents

For both TrustedLink Windows and the optional Remote User Interface, TrustedLink Windows provides a way to create a list containing the specific documents you need and then perform a task, such as printing.

To create the list, you can find documents based on trading partner, document type, date, processing status, or unique document numbers. These criteria can be combined to make the search as precise as necessary.

### EXAMPLE

You can complete these tasks after finding documents:

- Open an incomplete document in Data Entry to finish entering data
- Print all the invoices you received from a particular trading partner
- Delete all outgoing documents that were sent prior to a given date

### Finding Documents



- 1 To find all documents on your system that meet certain criteria

- 2 Click **Find**, or click **Edit > Find**.

The Find E-Commerce Document window opens.

- 3 On the Type & Location tab, select the Folder Name containing the documents. For example, select the **Incomplete** folder to find incomplete documents.

- 4 Select from the following options:

To find documents based on...	Go to:
Document type	step 1
Trading partner	step 1
Processing status (mapped, printed, or turned around)	step 3
Date created or transmitted	step 1
Document number or control number	step a

### Type & Location Tab

#### To find documents based on type, trading partner, or processing status




- 1 Make a selection from either one or both of the dropdown:

- Document Type
- Trading Partner

The default is **<All>** for both options. The following table shows possible selection combinations and their results:

Document Type	Trading Partner	Find Now displays:
<All>	A specific trading partner	All documents from that trading partner
A specific document type	<All>	That document type only, from all trading partners
A specific document type	A specific trading partner	That document type only, from the specified trading partner.

- 2 Click **Find Now** to start the search, or continue with step 3.
- 3 To find documents by processing status, check the Specify box.  
The Mapped, Printed, and Turned Around check boxes become active.
- 4 Indicate the document processing status by checking, disabling, or clearing each check box. Click a check box to cycle it through the following states:

Check Box	Description
	Checked—The operation has taken place. For example, check the Printed box to find documents that have been printed.
	Disabled—Find documents regardless of the status. Select this option to ignore any operation in your search.
	Blank—The operation has not taken place. For example, the documents have not been printed.

- 5 Click **Find Now** to start the search, or continue with “Date Tab” on page 108.

#### Date Tab

If you do not want to restrict your search based on the dates when documents were transmitted or created, leave the All E-Commerce Documents option selected on the Date tab and skip to step a on page 108.

#### To find documents based on transmission or creation dates

- 1 Click the Date tab.
- 2 Select the Find all E-Commerce Documents option.
- 3 Select either **Transmitted** or **Created** from the dropdown beside Find all E-Commerce Documents.
- 4 Select the date range using one of the following options:

To search...	Do this:
Between any two dates	<ol style="list-style-type: none"> <li>1 Select <b>between</b>.</li> <li>2 For both the starting and ending dates, either type the date, or click the ellipsis button (...) and select a date from the calendar.</li> </ol>
Within one or more months before today	<ol style="list-style-type: none"> <li>1 Select <b>during the previous ... month(s)</b>.</li> <li>2 Type the number of months.</li> </ol>
Within one or more days before today.	<ol style="list-style-type: none"> <li>1 Select <b>during the previous ... day(s)</b>.</li> <li>2 Type the number of days.</li> </ol>

- 5 Click **Find Now** to start the search.  
The Find E-Commerce Document window lists the found documents.
- 6 (Optional) If you want to find documents by their document or control numbers:
  - a Click the Unique Numbers tab.

- b** Type the number to find in the appropriate field. Only one number can be entered in each field. Wildcard characters are not allowed.
- 7** Were the correct documents found?
  - Continue with “Processing Found Documents” on page 109.
  - Click **New Search**. The document list and search options are cleared. Enter new search options, starting with step 3 on page 107.

### Processing Found Documents

To process or perform a task on a group of documents, use the menus on the Find E-Commerce Documents window.

#### To process found documents

- 1** Select the documents. To select the entire list, click **Edit > Select All**.
- 2** The following table describes the actions you can perform:

To do this...	Select:
View onscreen	<b>Documents menu &gt; Print Preview</b>
Print	<b>Documents menu &gt; Print</b>
Delete	<b>Documents menu &gt; Delete</b>
Open incomplete document in Data Entry	<b>Tools menu &gt; Complete Document</b>
Map to application file(s)	<b>Tools menu &gt; Map EDI to Application File</b>
Map to flat file(s)	<b>Tools menu &gt; Map EDI to Flat File</b>
Turn around	<b>Tools menu &gt; Turnaround EDI</b>

## Setting Preferences

The Preferences window offers a number of ways to customize TrustedLink Windows and Remote User Interface.

#### To select Preferences options

- 1** From the **Documents** menu, select **Preferences**.  
The Preferences window opens.
- 2** Click a tab and select an option.

#### General Options

The General tab contains these options.

**Note:** For Remote User Interface users, not all options are available.

Select this option:	To do this:
Auto Delete Trash After ... Days	Automatically delete documents from the <b>Trash</b> folder on a regular basis. Select this check box and type the number of days for documents to remain in the trash before deletion.  If you do not check this box, documents remain in the <b>Trash</b> folder until you delete them manually.
Trash Last Emptied	See the date the trash was last emptied.

Select this option:	To do this:
Do not move E-Commerce Documents to the Trash Folder...	Bypass the Trash folder. If this box is checked, selected documents are permanently removed from your system when you select Delete on the Operations window.
Minimize Status Window	Minimize the Communication Status window during a communication.
Communications Port	Change the default communications port assigned to any Log-ons merged into TrustedLink Windows in the future (existing Log-ons are not affected). The current communications port used by a Log-on is shown in its window (see “Configuring Log-on Information” on page 101).
Default Logon	Select a default logon profile from the drop-down menu that lists available logons. This makes it easier to find the logon you might use most often. TLW will highlight the default logon in the Communicate dialog when you start a communications process or the Select Logon dialog when you create a new trading partner.
Do Not Automatically Create for Addition of a New Trading Partner	Do not create an acknowledgement for a new trading partner.
Acknowledgment reconciliation report entries expire in...days	Specify the number of days an outgoing document waits for an acknowledgment. After the specified number of days, the document is no longer included on the Acknowledgment Reconciliation Report (see “Tracking Acknowledgments of Outgoing Documents” on page 222).
Part Cross-References	Automatically store part information from incoming documents during e-Commerce data audits. Clearing this check box can speed up processing of incoming documents. <b>Important:</b> Do not clear this check box if any of your Data Entry or Print Overlays, maps, or flat file requirements use Part Cross-Reference data.
Name and Addresses	Automatically store trading partner name and address information from incoming documents during e-Commerce data audits. Clearing this check box can speed up processing of incoming documents. <b>Important:</b> Do not clear this check box if any of your Data Entry or Print Overlays, maps, or flat file requirements use Names and Addresses table data.
Run Script Scheduler when Windows starts	Place the Script Scheduler in your Windows Startup group so it is always running.

### Setup Options

The Setup tab contains these options.

**Note:** For Remote User Interface users, not all options are available

Select this option:	To do this:
Temp Directory	Specify the default location for temporary files.
Flat File Directory	Specify the default location for flat files.
Command Line Log	Specify the full path and name of the Command Line log file. The default is: C:\Program Files\Inovis\TrustedLink windows\LOGS\SR.LOG

Select this option:	To do this:
Default Archive	Specify the default location and filename for archive files. If this is blank, you are prompted for a file name each time you archive.
Automatically Append Archive	Automatically append new data to an existing archive file. If this is blank, a confirmation dialog appears before overwriting an archive file.
Application File Dir	Path to the location of application files in TLW. Generally, this refers to data about to be mapped to an EDI format to prepare it for transmission. See also <i>TrustedLink Windows Mapper User Guide</i> . For example, C:\Program Files\Inovis\TrustedLink\mapdata.
Exported XML Dir	Specify path to the location where you wish XML files to be created when you export EC data to XML, then click <b>OK</b> . If you do not specify a path, XML files will be created in the Work directory.
Backup Database	Use this option to: <ul style="list-style-type: none"> <li>■ Auto backup database in days of your choice</li> <li>■ Set up backup directory</li> <li>■ Choose if want to show a pop up message box on backup</li> </ul>
E-Mail Notification for Inbound Documents	Use this option to set up e-mail notifications for inbound documents that are audited by the Audit Raw EC feature: <ul style="list-style-type: none"> <li>■ Active—Click the check box to place a check mark in it. Otherwise, no notifications will be sent. You must select this check box to use the following fields.</li> <li>■ SMTP Host Name—Type your SMTP host name.</li> <li>■ SMTP Port Number—Type your SMTP Port Number, or leave the default (25).</li> <li>■ From Email Address—Type your e-mail address that uses the server specified in SMTP Host Name above.</li> <li>■ To Email Addresses—Type the e-mail addresses of people who should receive notifications from you of inbound documents audited by the Audit Raw EC feature. The e-mail addresses should use the server specified in SMTP Host Name above. Use commas to separate multiple e-mail addresses.</li> </ul> <p><b>Important:</b> All e-mail addresses in the list must be valid for any e-mail notifications to be sent.</p>

### Miscellaneous Options

The Miscellaneous options help you manage the life cycle of your documents by specifying when and how they are removed from your system. The Miscellaneous tab contains these options.

**Note:** For Remote User Interface users, not all options are available.

Select this option:	To do this:
Display confirmation dialog boxes	Display messages that report system actions, such as the number of documents just printed, or to request confirmation of user actions, such as deleting a group of documents. Clear this check box to suppress these confirmation messages.
Default button for confirmation dialog is YES	Select the Yes button by default on confirmation message boxes. If this option is not checked, the No button is selected.
Use Data Entry Form for Print	Print documents using Data Entry Overlays. Normally, Print Overlays supplied by Inovis are used to print documents.
Use Data Entry Form for Preview	Preview documents using Data Entry Overlays. Normally, Print Overlays are used to view documents onscreen.
Allow different Forms Overlay document types to be assigned	Assign Print Overlays or Data Entry Overlays of any document type to a document. If this option is not selected, you can only assign Print Overlays or Data Entry Overlays of the same document type. For example, if the document type is 810, you can only assign an 810 Print Overlay or 810 Data Entry Overlay to it.
Append Application File	Add newly mapped documents to the existing application file. If this option is not selected, the existing application file is overwritten each time you use the Map EDI to Application File command. See "Mapping EDI Documents to Application Files" on page 132.
Append Application File for Current Session Only	Add newly mapped documents to the existing application file for the current session. If this option is selected, the existing application file is overwritten each time you use the Map EDI to Application File command. See "Mapping EDI Documents to Application Files" on page 132.
Append Flat File	Add newly mapped documents to the existing flat file. If this option is not selected, the existing flat file is overwritten each time you use the Map EDI to Flat File command. See "Mapping EDI Documents to Flat Files" on page 131.
ToolTips	Display a caption when the mouse pointer rests over a button on the TrustedLink Windows Operations window.
Advanced ToolTips	Display a caption when the mouse pointer rests over one of the first four column headings in the document list, and show truncated folder names in their entirety when the mouse pointer rests over the name.
Show Tip of the Day at startup	Show a different hint about using TrustedLink Windows each time you start Operations.
Raw EC Viewer shows wraps by default	Show the envelope segments on documents you open in the Raw EC Data Viewer.



### EC Document View Option

The EC Document View tab contains these options:

Select this option:	To do this:
Viewable E-Commerce Document Attributes	Display or exclude a column in the document list on the Operations window. Checked columns are displayed.

### Startup Options

You can run a script when starting TrustedLink Windows Operations, or automatically view a specific folder when starting. The Startup tab contains these options.

**Note:** For Remote User Interface Users, not all options are available.

Select this option:	To do this:
Run a Script at startup	Automatically run a script each time you start TrustedLink Windows Operations. Select the check box, then select a script from the list.
Start in a specific folder	Designate the folder to open each time you start TrustedLink Windows Operations. Select the check box, then select a folder from the list.

### Shutdown Option

You can run a script when you exit TrustedLink Windows Operations. The Shutdown tab contains this option.

Select this option:	To do this:
Run a Script at shutdown	Automatically run a script when you exit TrustedLink Windows Operations. Select the check box, then select a script from the list. If you use this option, the TrustedLink Windows Function Server continues to run after you exit TrustedLink Windows Operations.

## Customizing the Document List

By default, the most commonly needed information about your documents is displayed in the document list. Additional options for displaying information are available.

- “Adding or Removing Columns” on page 113
- “Resizing Columns” on page 114
- “Moving Columns” on page 114
- “Sorting the Document List” on page 114

### Adding or Removing Columns

#### To add or remove columns in the document list

- 1 Go to the **Documents** menu and select **Preferences**.  
The Preferences window opens.
- 2 Click the EC Document View tab.

The Viewable E-Commerce Document Attributes list contains all the columns that can be displayed.

- 3 Select the check boxes beside columns to display, and clear the check boxes beside columns you do not want to display.

These choices are saved when you exit, and remain in effect for future sessions.

**Note:** The first four columns—Transmission Status, Mapped, Printed, and Turned Around—cannot be removed.

### Resizing Columns

By resizing, you can make a column wider to avoid cutting off its contents, or narrower to fit more columns on the window.

#### To resize a column

- 1 Move the pointer to the line between two column headings.
- 2 Click and drag to widen or narrow the column.

To automatically size a column to display its longest value, right-click the column heading.

### Moving Columns

You can change the order of the columns across the window to put the most important ones first.

#### To move a column:

Click the column heading and drag it to the new position.

The column order is saved when you exit and remains in effect for future sessions.

### Sorting the Document List

By default, documents are listed by document type. However, any column can be used to sort (order) the document list.

The column that currently determines the sort order of the list is indicated by a triangle symbol. A triangle pointing up indicates the list is sorted in ascending order. A triangle pointing down indicates descending sort order.

Trading Partner Name ▲

#### EXAMPLE 1

Click the **Trading Partner Name** column to sort the documents alphabetically by trading partner.

Received ▼

#### EXAMPLE 2

The triangle indicates the documents are sorted in descending order by date received, with the most recent first.

### To change the way the document list is sorted

Perform the appropriate action:

To change the...	Do this:
Column that sorts the list	Click the column.
Order in which the column is sorted (ascending or descending)	Click the column containing the triangle symbol to reverse the sort order.

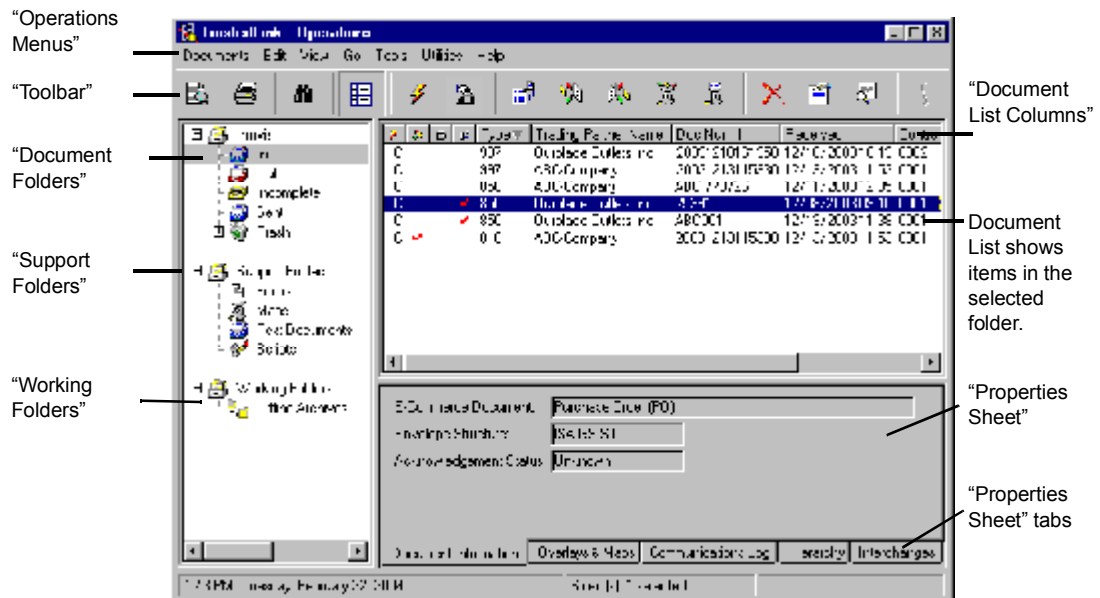
## Operations Window Reference

The following sections describe the options on the TrustedLink Windows Operations window:

- “Operations Menu” on page 116
- “Toolbar” on page 117
- “Document List Columns” on page 118
- “Document Folders” on page 119
- “Support Folders” on page 120
- “Working Folders” on page 120
- “Quick Launch Options” on page 120
- “Properties Sheet” on page 120
- “Keyboard Shortcuts” on page 123

### Operations Window

The individual items are detailed in “Operations Menu” on page 116.



## Operations Menus

This table describes the menus on the Operations window.





**Note:** For Remote User Interface users, not all options are available.












Menu	Command	Function
<b>Documents</b>	<b>New &gt; EDI from Data Entry</b>	Start Data Entry
	<b>New &gt; EDI from Application File</b>	Start an application-file-to-EDI mapping operation
	<b>New &gt; EDI from Flat File</b>	Start a flat-file-to-EDI mapping operation
	<b>New &gt; Script</b>	Create a new script
	<b>New &gt; Script from Existing UOP script</b>	Locate an existing UOP script
	<b>Print Setup</b>	Choose printer options
	<b>Print Preview</b>	View a document
	<b>Print</b>	Print selected documents
	<b>Delete</b>	Delete selected documents or send to Trash
	<b>Send To...</b>	Copy or move selected documents
	<b>Preferences</b>	Set user preferences
	<b>Exit</b>	Exit TrustedLink Windows Operations
	<b>Exit and Log Off</b>	Requires password for next start-up (if User Security is turned on)
<b>Edit</b>	<b>Find</b>	Display the Find E-Commerce Documents window
	<b>Select All</b>	Select all documents currently displayed
<b>View</b>	<b>Properties Sheet</b>	Show or hide the Properties Sheet
	<b>Events</b>	Open the Event Viewer
	<b>Log Files</b>	Open the Log File Viewer
	<b>Session Documents</b>	Open the Session Document Viewer
	<b>Refresh</b>	Update the document list
<b>Go</b>	<b>Administration Data Entry Forms Builder Report Generator Document Turnaround Editor Custom (options vary depending on which custom modules you purchased)</b>	Start or switch to other TrustedLink Windows modules

Menu	Command	Function
<b>Tools</b>	<b>Communicate</b>	Initiate a communications session
	<b>Map EDI to Application File</b>	Translate selected documents to application files
	<b>Map Application File to EDI</b>	Translate application files to EDI documents as specified by the map
	<b>Map EDI to Flat File</b>	Translate selected documents to flat files
	<b>Map Flat File to EDI</b>	Translate flat files in the flat file directory to EDI documents
	<b>Turnaround EDI</b>	Turn around selected documents
<b>Utilities</b>	<b>Trading Partner List</b>	Display names of all trading partners on your system and rename trading partners
	<b>Module Administration</b>	Display TrustedLink Windows, Remote User Interface, and AS2 information.
	<b>Audit Raw EC Data</b>	Audit data from a file as incoming documents
	<b>Bundle EC Data</b>	Bundle selected documents into outgoing electronic documents
	<b>Start Script Scheduler</b>	Run all scheduled script commands at appropriate times
<b>Help</b>	<b>Tip of the Day</b>	Show the next tip
	<b>Online Help</b>	Open online help
	<b>On the Web</b>	World Wide Web links to: <ul style="list-style-type: none"> <li>■ Online Support Customer Self-Service</li> <li>■ Inovisworks</li> <li>■ Inovis Home Page</li> </ul> Information about TrustedLink Windows, e-Commerce, and Inovis
	<b>Online Manuals</b>	Reference manuals and guides for printing or online viewing
	<b>ReadMe Files (if provided)</b>	Reference file for printing or online viewing
	<b>About TrustedLink Windows...</b>	Display the version number and account codes for technical support

### Toolbar

The following table describes the toolbar buttons on the Operations window:



Button	Function	Button	Function
	<b>Print Preview</b>		<b>Show/Hide Properties Sheet</b>
	<b>Print</b>		<b>Communicate</b>



Button	Function	Button	Function
	<b>Find Documents</b>		<b>Start Data Entry</b>
	<b>Document Turnaround</b>		<b>Delete</b>
	<b>Map EDI to Flat File</b>		<b>View Document Attributes</b>
	<b>Map Flat File to EDI</b>		<b>View Raw E-Commerce Data</b>
	<b>Map EDI to Application File</b>		<b>Execute Script</b>
	<b>Map Application File to EDI</b>		

### Document List Columns

The column titles in the document list change depending on the type of folder selected. When any of the document folders is selected, you can choose which columns to display. See “Adding or Removing Columns” on page 113.

The first four columns are always present, and indicate the status of your documents.

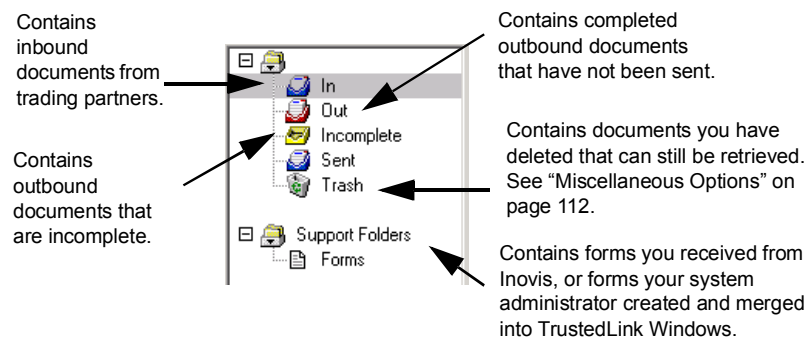
Icon	Name	Status Indicated
	<b>Transmission Status</b>	<p>Transmission status codes include:</p> <ul style="list-style-type: none"> <li>■ C—Received successfully</li> <li>■ F—Failed MDN Processing</li> <li>■ Q—Queued</li> <li>■ R—Re-queued</li> <li>■ S—Sent successfully</li> <li>■ T—Transmitting</li> </ul>
	<b>Mapped</b>	If a check mark is in this column, the document has been mapped to either a flat file or an application file.

Icon	Name	Status Indicated
	<b>Printed</b>	If a check mark is in this column, the document has been
	<b>Turned Around</b>	If a check mark is in this column, the document has been turned around (the data was used to create another document).

### Document Folders

All incoming, outgoing, and incomplete documents are stored in folders.

**Note:** An *incoming* document is a document you receive from a trading partner. An *outgoing* document is a document you send to a trading partner.






You can also create your own folders to organize your documents as described in "Creating a Folder" on page 194:

**Note:** Users of the optional Remote User Interface cannot create their own folders.

### Folder Colors

A folder's color changes to indicate whether it contains documents:

Folder Color	Description
	Yellow—No documents are in the folder.
	Blue—A folder contains documents.
	Red—Documents are queued to send in the Out folder.

### Support Folders

Custom and trading partner-specific components, as well as text documents, are stored in the support folders.

Support Folder	Contents
Forms <b>Note:</b> Also available in Remote User Interface.	Data Entry and Print Overlays you received from Inovis or created using TrustedLink Windows Forms, and merged into TrustedLink Windows.
Maps	EDI to Application and Application to EDI File Maps from Inovis or maps you created using TrustedLink Windows Map or STMAP®.
Text Documents	Contains reports and messages from your network or text (not e-Commerce) documents from your trading partners.
Scripts	Scripts you created.

### Working Folders

For TrustedLink Windows, these folders provide access to archived documents.

#### To select an archive file

Click **Offline Archives**.

The archive files are displayed as subfolders under the **Offline Archives** folder, and the contents are shown in the document list.

See “Archiving and Restoring Documents” on page 200 for more information.

### Quick Launch Options

You can open Forms Overlays, Document Turnaround Maps, scanning maps, and scripts from the TrustedLink Windows Operations document list by double-clicking them.

Double-click a...	To open it in...
Data Entry Overlay	TrustedLink Windows Forms Builder
Print Overlay	TrustedLink Windows Report Generator
Document Turnaround Map	TrustedLink Windows Forms Turnaround Editor
Scanning map	TrustedLink Windows Forms Turnaround Editor
Script	TrustedLink Windows Script Editor

### Properties Sheet

The Properties area of the Operations window (called the Properties Sheet) displays additional information about the item selected in the document list above it. With certain exceptions, this information is provided for reference and cannot be edited.

#### To display the Properties Sheet

Click **Properties Sheet**.



The following sections describe the information shown on the Properties Sheet tabs when an e-Commerce document is selected:

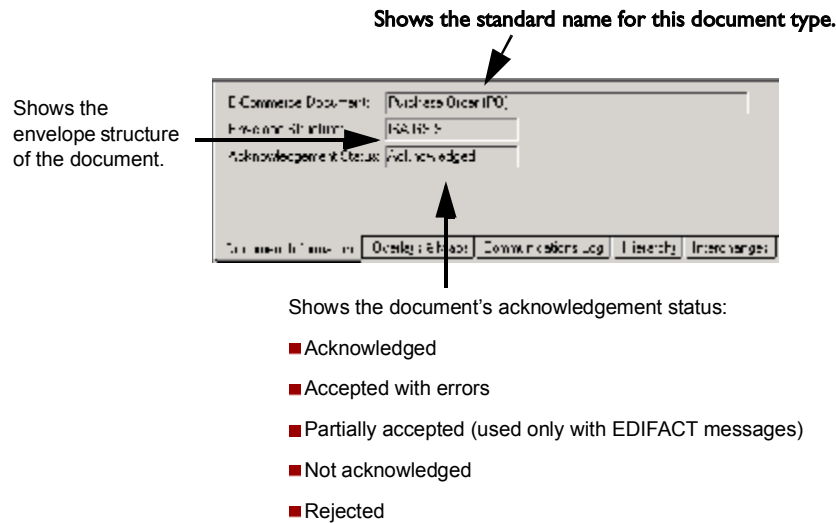
- “Document Information Tab”
- “Overlays and Maps Tab” on page 121
- “Communications Log Tab” on page 122



- “Hierarchy Tab” on page 122
- “Interchanges Tab” on page 122

### Document Information Tab

The Document Information tab on the Properties sheet displays information about the selected document:



### Overlays and Maps Tab

The Overlays and Maps tab on the Properties sheet shows which Forms Overlays and File Maps are used to process a document. These assignments are part of the trading partner definition.

Data Entry Overlay:	Not Assigned
Print Overlay:	HD8_850_P_v4010_HONDA^GPCS DELTA_020415
AE File Map:	Not Assigned
EA File Map:	EA850B

Document Information   Overlays & Maps   Communications Log   Hierarchy   Interchanges

### To make or change an overlay or map assignment

Click the down arrow and select a Forms Overlay or File Map.

Changes made here are applied to the trading partner definition (see Chapter 3, “Managing Trading Partners,” on page 47).

### Communications Log Tab

The Communications Log tab on the Properties sheet shows a summary of your most recent communications activity.

Date	Log-on Name	Function	Result
02/25/2004 10:15	inoworks.net v2.0	Send And Receive	Failure
02/25/2004 08:16	inoworks.net v2.0	Receive Only	Success

To prevent the log from becoming too large, right-click an item and, select **Purge Comm Log**.

### Hierarchy Tab

The Hierarchy tab on the Properties sheet shows the interchange in which the document was received or sent.

Structure	Date	Control Number	Log-on Name	DocID
ISA	02/25/2004 08:15	000000001	New Trading Partner-Int	AAA340
GS		1	New Trading Partner	AAA342
ST Invoice(810)	2515425	0001		AAA343
ST Invoice(810)	2515425	0002		AAA344
ST Invoice(810)	2515425	0003		AAA345
ST Invoice(810)	2515425	0004		AAA346

To re-queue or delete a document, select it and right-click.

**Note:** If a document is incomplete or outgoing but not sent, only the document is shown, not the interchange. For more information about interchanges, see “Viewing Interchanges” on page 195.

### Interchanges Tab

The Interchanges tab on the Properties sheet shows all interchanges in the selected folder.

Interchange Trading Partner	Date	Control Number	Log-on Name	DocID
New Trading Partner-Int	02/25/2004 08:15	000000001	inoworks.net v2.0	AAA326
New Trading Partner-Int	02/25/2004 08:15	000000001	inoworks.net v2.0	AAA340

Right-click an interchange to:

- Archive, delete, move, or copy it
- View its contents

- | Structure               | Date            | Contract Number | Interchange Trading Partner | DocID  |
|-------------------------|-----------------|-----------------|-----------------------------|--------|
| ISA                     | 12/29/2010 8:00 | 00000001        | New Trading Partner         | 623391 |
| ISA                     |                 |                 | New Trading Partner         | 623392 |
| 37 Invoice(81C) 25 F43F |                 | 0001            |                             | 623393 |
| 37 Invoice(81C) 25 F43F |                 | 0002            |                             | 623394 |
| 37 Invoice(81C) 25 F43F |                 | 0003            |                             | 623395 |
| 37 Invoice(81C) 25 F43F |                 | 0004            |                             | 623396 |
| 37 Invoice(81C) 25 F43F |                 | 0005            |                             | 623397 |
| 37 Invoice(81C) 25 F43F |                 | 0006            |                             | 623398 |
| 37 Invoice(81C) 25 F43F |                 | 0007            |                             | 623399 |
| 37 Invoice(81C) 25 F43F |                 | 0008            |                             | 623400 |
| 37 Invoice(81C) 25 F43F |                 | 0009            |                             | 623401 |
| 37 Invoice(81C) 25 F43F |                 | 0010            |                             | 623402 |

The following menu options on the Operations window can also be selected by pressing combinations of keys:



# Processing Incoming Documents

# 6

**A**n incoming document is a document you receive from a trading partner. This chapter first describes two situations you are likely to encounter regardless of how you process your incoming documents.

**Note:** You can only use the optional Remote User Interface to view and print e-Commerce documents, or copy or move the documents from one document folder to another.

This chapter is organized as follows:

- “Documents from New Trading Partners” on page 125  
Describes how TrustedLink Windows handles documents received from trading partners that have not yet been defined in TrustedLink Windows.
- “Acknowledgments” on page 127  
Describes a special category of document created automatically to acknowledge receipt of an e-Commerce document. Other types of acknowledgements are TA1, 997, or CONTRL message, depending on the e-Commerce standard used.

The most common ways to process incoming documents:

- “Previewing and Printing Documents” on page 128
- “Mapping EDI Documents to Flat Files” on page 131
- “Mapping EDI Documents to Application Files” on page 132

Other tasks you might perform less frequently:

- “Viewing Raw E-Commerce Data” on page 134
- “Viewing, Printing, and Saving Attached Files” on page 135
- “Creating XML Documents” on page 136

## Documents from New Trading Partners

After a communications session in which you received documents, you might see a message you have received a document from a New Trading Partner. This means TrustedLink Windows did not recognize the sender, and created a new trading partner definition for it.

You can rename this trading partner to something easy to identify, and then process the document as described in this chapter. See “Renaming a Trading Partner” on page 126.

Every document stored in TrustedLink Windows, whether incoming or outgoing, must be associated with a trading partner. In TrustedLink Windows, the term trading partner has two meanings:

- An entity, such as a company, plant, store, government agency, or organization, with which you exchange e-Commerce documents.
- A collection of identification information, settings, map and form assignments, and other information, which enables TrustedLink Windows to process the documents you exchange with a particular entity. This is called the *trading partner definition*.

See Chapter 3, “Managing Trading Partners” on page 47.

TrustedLink Windows creates a trading partner definition for you automatically whenever you receive a document from a trading partner that does not already have a definition.

The trading partner is named New Trading Partner (or if you already have a trading partner with that name, New Trading Partner 1, and so on). The definition is stored in TrustedLink Windows Administration.

### Identifying the Sender

In some instances you might not know who sent you the document. To help identify an unknown sender:

- Look at the full trading partner definition in TrustedLink Windows Administration. Items that might provide clues about the sender include:
  - Network (through which network did you receive it?)
  - Their IDs (for example, a name, DUNS number or phone number)

See Chapter 3, “Managing Trading Partners” on page 47.

- Look at the document data itself. The wrap or N1–N4 segments might contain recognizable IDs or addresses. See “Viewing Raw E-Commerce Data” on page 134.

### Renaming a Trading Partner

To make processing your documents easier, you can change the generic name New Trading Partner to something easy to identify. The name can be anything you choose (up to 80 characters). This name is used only within TrustedLink Windows, and your trading partner does not see it.

#### EXAMPLE

A company name (such as Ourplace Outlets) or a specific division, plant, or location (such as Ourplace–Store 257 or Ourplace–Accounting).

**Important:** If you process documents for this trading partner using EDI-to-flat file or flat file-to-EDI mapping, the trading partner name must be 12 characters or less.

#### To rename a trading partner

- 1 On the Operations window, go to the **Utilities** menu and select **Trading Partner List**.  
The Trading Partner List window opens.
- 2 Clear the Read Only check box.  
A message asks you to confirm editing trading partner names.
- 3 Click **Yes** to dismiss the message.
- 4 Click once to select the New Trading Partner name, then click the name again to edit it.
- 5 Type the new name and press **Enter**.
- 6 To rename another trading partner, repeat steps 4 through 5.

**7** Close the Trading Partner List window.

The new trading partner name is shown in the document list in TrustedLink Windows Operations.

## Acknowledgments

Your trading partners might send you *acknowledgments* of documents they receive from you. Acknowledgments are a special type of e-Commerce document (also known as TA1s, 997s, or CONTRL messages) that track the receipt of other documents. TrustedLink Windows generates them automatically, without the need for action on your part other than to set the options for each of your trading partners.

Do not confuse acknowledgments with other documents that acknowledge document contents, such as a Purchase Order Acknowledgment. Acknowledgments only confirm a document was received, not necessarily that it was read, acted upon, or accepted.

**Note:** Some trading partners, however, may use the 997 Acknowledgment Status code to communicate problems in the originating document. TLW displays these 997s in red in the In folder, as described in “Acknowledgment Codes in 997s” on page 127.

You and your trading partner must agree on whether or not you will send acknowledgments, and under what circumstances.

If you use the Receive Only function to communicate, the acknowledgments are not sent. In this case you must perform a separate Send function, or use Send and Receive, to send the acknowledgments. See “Sending and Receiving Documents” on page 95 for more information.

See “Managing Acknowledgments” on page 220 for more details on setting acknowledgment options, including how to track them and using them to alert you if errors occur.

### TA1, 997, or CONTRL Documents in the In Folder

If you receive TA1 or 997 (ANSI ASC X12 standard) or CONTRL (UN/EDIFACT standard) documents in the In folder, this means your trading partner received a document from you.

You can view or print the acknowledgments, or you can delete or archive them. TrustedLink Windows includes pre-installed Print Overlays for printing 997 and CONTRL documents. Follow the procedures for “Previewing and Printing Documents” on page 128 to view or print these documents.

### Acknowledgment Codes in 997s

TLW supports the following Acknowledgment Codes in 997 documents:

- A—Accepted
- E—Accepted, But Errors Were Noted.
- M—Rejected, Message Authentication Code (MAC) Failed
- P—Partially Accepted, At Least One Transaction Set Was Rejected
- R—Rejected
- W—Rejected, Assurance Failed Validity Tests
- X—Rejected, Content After Decryption Could Not Be Analyzed

If an inbound 997 indicates that the originating document (for example, an ASN) contains a problem, the **In** folder in TrustedLink Operations will display the 997's transmission status (C) and document type (997) in red. This will occur if the Acknowledgment Status (AckStatus) for the inbound 997 is anything other than A (Accepted) or E (Accepted with Error).

### INTACKs in the Out Folder

Each time you receive a document, TrustedLink Windows creates an acknowledgment document called INTACK (internally-formatted acknowledgment) in the **Out** folder.

INTACKs are temporary holding files for acknowledgment information. The trading partner definition specifies how they are processed, as shown in the following table:

If the trading partner definition specifies:	Then the INTACKs are automatically...
Do not send acknowledgments	Deleted from the <b>Out</b> folder without sending a 997 or CONTRL document.
Send acknowledgments	Converted to outgoing documents (997 or CONTRL) and sent. The INTACKs are removed from the <b>Out</b> folder, and the acknowledgment documents are moved to the <b>Sent</b> folder.
New Trading Partner name	Created in the <b>Out</b> folder with a blank trading partner name in the list. Rename and edit the trading partner definition to specify acknowledgment processing. See "Managing Acknowledgments" on page 220.

The outgoing acknowledgments are sent automatically the next time you send data to the trading partner.

## Previewing and Printing Documents

You can preview and print your e-Commerce documents using either Print Overlays or Dictionary format.

### Print Overlays

A Print Overlay is a form (similar to a paper form) for displaying e-Commerce data. Print Overlays are designed for a specific trading partner and document type, and are available from Inovisworks.

A Print Overlay is a type of Forms Overlay. Forms Overlay is a generic term that describes both Print Overlays and Data Entry Overlays.

#### EXAMPLE

You receive purchase orders from Ourplace Outlets. To print them, you must use the Ourplace purchase order Print Overlay. You cannot use either a purchase order Print Overlay for another company, or an Ourplace Print Overlay for another kind of document, because neither one contains the right fields to display the Ourplace purchase order data. You need one Print Overlay for each document type that you preview or print, for each of your trading partners.

A few possible exceptions are:

- If you have several trading partners that represent divisions or locations of the same large company, in many cases you can use the same Print Overlays for all of them.



- You can preview or print using Data Entry Overlays, but this use is not recommended. To do so, change the default setting in User Preferences (see “EC Document View Option” on page 113 for instructions).

Before you can use a Print Overlay, it must be both:

- Installed (merged) on your system
- Assigned to the trading partner associated with the document

### Assigning a Forms Overlay to a Trading Partner

To assign a Data Entry Overlay, use this procedure and substitute **Data Entry** for **Print**.

#### To assign a Print Overlay to a trading partner:

- 1 On the Operations window, select the folder containing the document(s) to preview or print (usually the **In** folder).
- 2 Select a document.
- 3 If the Properties Sheet is not visible, click **Properties Sheet** to display it.
- 4 In the Properties Sheet, select the Overlays & Maps tab.
- 5 Click the down arrow to see the list of all Print Overlays on your system for the selected document type.



For example:

If the selected document is an 850 (X12 Purchase Order), only purchase order Print Overlays are shown in this list. If the Print Overlay was provided by Inovis, its name resembles the following: OPO\_850\_P\_v3010\_OURPLACE\_980310

The document type (850) is in the name, as well as the company for which it was created (Ourplace). The last six characters of the name indicate the date the Print Overlay was created. If you have more than one version, use the one with the latest date.

- 6 Select the Print Overlay.

If the Print Overlay you must use is not listed, check whether you selected the correct document. If you did, then the Print Overlay is not merged into your system. Follow the instructions for “Downloading Forms and Log-ons” on page 29.

- 7 To clear an assignment, click **<Not Assigned>**.

When you assign a Print Overlay to a document, TrustedLink Windows compares the e-Commerce standard versions of the document and the Print Overlay. If they do not match, a warning message opens. You can still assign the Print Overlay, but the resulting printouts might be incorrect.

The assignment made in these steps covers all documents of this type for this trading partner. You do not need to repeat these steps to print such documents in the future. To print documents of this type for other trading partners, or to print other types of documents, repeat the assignment steps.

### Dictionary View/Print Format

You can also preview or print X12 or EDIFACT documents in Dictionary format. If no Print Overlay is assigned to a trading partner for a document type, the Dictionary format is automatically used.

**To use the Dictionary format if have already assigned a Print Overlay**

Deselect the **Use Data Entry Form for Print** and **Use Data Entry Form for Preview** options in the Preferences dialog box.

See “Miscellaneous Options” on page 112 for details.

**DICTIONARY FORMAT PRINTOUT EXAMPLE (PARTIAL DOCUMENT)**

```

TO: Your Company Name                      FROM: New Trading Partner
Received: 01/15/2004 2:07 pm                SHIPPING SCHEDULE(862)
BEGINNING SEGMENT FOR SHIPPING SCHEDULE:
TRANSACTION SET PURPOSE CODE                Original
REFERENCE IDENTIFICATION                    OVER00013
DATE                                        12/01/2003
SCHEDULE TYPE QUALIFIER                     Delivery Based
DATE                                        01/01/2004
REFERENCE IDENTIFICATION                    000000407
SCHEDULE QUANTITY QUALIFIER                Actual Discrete Quantities
Transaction Creation 12/01/2003 02:46 PM
Shipping Schedule Issuer:
NA TBI-M
D-U-N-S Number, Dun & Bradstreet 12345C
ANN ARBOR, MI 48105
Supplier/Manufacturer:
NOVA SUPPLIERS
D-U-N-S Number, Dun & Bradstreet 987654321
123456
TOWN, IOWA 50000
Ship From:
ELECTRONIC SUPPLIER
D-U-N-S Number, Dun & Bradstreet 001002003
CITY, TEXAS 70000
ITEM                                     DESCRIPTION
Buyer's Part Number                     12052180
Purchase Order Number                   00047633
Part Number Description                 ELECTRONIC PART XX
Engineering Change Level                A
Release Number                         S00000013
UNIT DETAIL:

```

**Printing Documents**

**To print documents**

- 1 Select one or more documents in either the Operations window or the Find E-Commerce Documents window (see “Finding Specific Documents” on page 107).



- 2 Click **Print**.

The Print Setup window opens.

- 3 Click **OK** to print the document(s) on the Windows default printer.

To select another printer, change the default printer setting in Windows, not TrustedLink Windows. Changing the selection shown in the Print Setup window does not change the printer.

**Previewing Documents**

**To preview documents before printing**



- 1 Select one or more documents on either the Operations window or the Find E-Commerce Documents window (see “Finding Specific Documents” on page 107).

- 2 Click **Print Preview**.

The TrustedLink Windows View Report window opens and your documents are displayed.

If you selected more than one document to preview, click the **Window** menu to switch to another document.

The following options are available when previewing a document:



## Mapping EDI Documents to Flat Files

Flat filing is a simple way to integrate EDI data between TrustedLink Windows and other applications. All that is required to perform flat filing is a Data Entry or Print Overlay.

A flat file is a record-oriented, sequential text file formatted to be used by more than one software package. TrustedLink Windows can create flat files from EDI documents, and create EDI documents from flat files.

Mapping is the process of converting the documents from one format to the other. A flat file can contain multiple documents, of different types and associated with different trading partners.

For detailed information about the TrustedLink Windows flat file structure, naming convention, and terminology, see Appendix A "TrustedLink Windows Flat File Layout," on page 245.

### Prerequisites

To map an EDI document to a flat file, you must first have either the correct Data Entry or Print Overlay. If you have both types of Forms Overlays assigned, the Data Entry Overlay is used.

The Data Entry Overlay (or Print Overlay) must be both:

- Installed (merged) on your system
- Assigned to the incoming document in the trading partner definition. See "Assigning a Forms Overlay to a Trading Partner" on page 129.

For instructions on merging a Forms Overlay, see "Downloading Forms and Log-ons" on page 29.

For instructions on how to assign a Forms Overlay, see "Assigning a Forms Overlay to a Trading Partner" on page 129.

## Mapping EDI Documents to Flat Files

### To map EDI documents to flat files

- 1 Select one or more documents on either the Operations window or the Find E-Commerce Documents window (see "Finding Specific Documents" on page 107).

The Mapped column on the document list contains a check mark if the document has been mapped to either an application file or a flat file.

Click the Mapped column heading to sort documents that have been mapped from those that have not.

**2 From the **Tools** menu, select **Map EDI to Flat File**.**

The flat files are placed in the MAPDATA directory within the main TrustedLink Windows directory. The default path is:

C:\Program Files\Inovis\TrustedLink Windows\MAPDATA

All the selected documents with the same parameters are placed in one flat file. If the Forms Overlays for the selected documents contain different flat file parameters, a separate flat file is created for each combination of parameters.

**Important:** The new flat file overwrites any existing file of the same name in the same directory. To append (add) the new documents to an existing file, you must specify this in Preferences. See “Miscellaneous Options” on page 112 for instructions.

## Mapping EDI Documents to Application Files

An application file is a file that can be processed by another software application. You can map e-Commerce documents to files for processing by a mainframe system, spreadsheet, accounting package, or other business application.

Application file mapping is more sophisticated and powerful than flat file mapping because the translated file is specifically formatted for the application, whereas the flat file is a more generic format.

This section includes the following instructions:

- “Assigning a File Map to a Trading Partner” on page 132
- “Viewing Application File Names” on page 133
- “Mapping EDI Documents to Application Files” on page 133

### Prerequisites

Mapping documents to an application file requires a *File Map* developed specifically for the document type, trading partner, and application. The File Map defines the relationship between each field in the document type and the application, including rules for processing and special calculations.

Before you can use a File Map, it must be both:

- Installed (merged) on your system
- Assigned to the incoming document type in the trading partner definition.

For instructions on merging a File Map, see “TrustedLink Components” on page 29.

### Assigning a File Map to a Trading Partner

#### To assign a File Map to a trading partner

- 1 On the Operations window, select the folder containing the document(s) to map to application files (usually the **In** folder).
- 2 Select a document.
- 3 If the Properties Sheet is not visible, click **Properties Sheet** to display it.
- 4 On the Properties Sheet, select the Overlays & Maps tab.
- 5 Are the words “Not Assigned” displayed beside EA File Map?



- If Yes, continue with step 6.
  - If No, the map is already assigned.
- 6** Click the down arrow to see the list of all EDI to Application File Maps for the selected document type on your system, and select a map.
- For example, if the selected document is a purchase order, only purchase order File Maps are shown in this list.
- If the File Map you must use is not listed, check to make sure you selected the correct document. If you did, then the File Map is not merged into your system. Locate the disk containing the File Map, and follow the directions for “Merging Forms, Log-ons, and Maps” on page 31.
- 7** To clear an assignment, click **<Not Assigned>**.

### Viewing Application File Names

For STMAP, the application file name is determined by the File Map.

#### To look up the name on the Properties Sheet on the Operations window



- 1** If the Properties Sheet is not visible, click **Properties Sheet**.
- 2** Select the **Maps** folder located under **Support Folders**.  
All File Maps on your system are shown in the document list.
- 3** Select the map.  
The output file(s) are listed in the File Names box on the File Map Information tab.

### Defining Mapper Application File Names

For Mapper (formerly Catalyst:Map), you can define the application file name in TrustedLink Windows Administration.



#### To set up the application file name for Mapper

- 1** Open TrustedLink Windows Administration, and click **Trading Partners**.
- 2** Select a trading partner, and click **Edit**.  
The Trading Partner Control Panel opens.
- 3** Click **ST Details** (or **UNH Details**).  
The Transaction Definition dialog box opens.
- 4** Define the application file name in the Mapper Settings area.
- 5** Click **OK** twice, then click **Close**.

### Mapping EDI Documents to Application Files

#### To map e-Commerce documents to application files

- 1** Select one or more documents on either the Operations window or the Find E-Commerce Documents window (see “Finding Specific Documents” on page 107).  
The Mapped column on the document list contains a check mark if the document has been mapped to either an application file or a flat file.  
Click the Mapped column heading to sort documents that have been mapped from those that have not.
- 2** From the **Tools** menu, select **Map EDI to Application File**.

The application files are placed in the MAPDATA directory within the main TrustedLink Windows directory. The default path is:

C:\Program Files\Inovis\TrustedLink Windows\MAPDATA

The application file overwrites any existing file of the same name in the same directory. To append (add) the new documents to an existing file, you must specify this in Preferences. See “Miscellaneous Options” on page 112 for instructions.

## Viewing Raw E-Commerce Data

Ordinarily, you process e-Commerce documents without looking at them in their raw state—the e-Commerce data in machine-readable form. On occasion you might need to see the raw data of a document to resolve an error, identify an unknown trading partner, or save the data to a text file.

This section is organized as follows:

- “Viewing a Document as Raw Data” on page 134
- “Printing Multiple Documents as Raw Data” on page 135

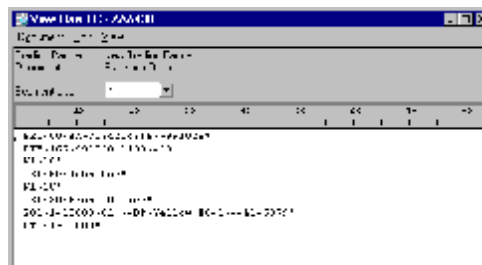
### Viewing a Document as Raw Data

#### To view raw e-Commerce data

- 1 On the Operations window, select one or more documents.
- 2 Click **View Raw EC**.



The View Raw EC window opens, displaying the document data with each segment on a single line. If you selected more than one document, a separate View Raw EC window opens for each document so you can compare documents, if necessary.



The following table shows how to perform tasks in the View Raw EC window:

To do this:	Use this command...
Save the document to a text file (specify name and location)	Document - Save As
Print a single document	Document - Print
Search for specific text	Search – Find and Find Next
Show/hide the envelope segments associated with the document	View – EDI Wraps When EDI Wraps are shown, a line containing three dots (...) indicates the presence of another document in the same group or interchange.
Show/hide the ruler	View – Ruler

To do this:	Use this command...
Show/hide the trading partner name and document type	View – Document Info
Display only occurrences of a specific segment	Select the segment from the down Segment List

### Printing Multiple Documents as Raw Data

Use the following procedure to print multiple documents as raw EDI data.

#### To print multiple documents as raw EDI data

- 1 On the Operations window, select one or more documents.
- 2 Hold down the **Ctrl** key and select the documents you wish to print.
- 3 Right-click on a selected area in the list to display a menu.
- 4 In the menu, click **Print Raw EDI**.  
The Print dialog opens.
- 5 In the dialog, click **OK** to print the documents in raw EDI format to your printer.

## Viewing, Printing, and Saving Attached Files

E-commerce documents can also have the following two types of files attached to them:

- Text documents
- Binary files

This section discusses these types of files and how to handle them.

### Text Documents

Some networks provide various reports and messages to their subscribers. These reports and messages are stored in TrustedLink Windows as text documents. They typically include error messages that are useful for troubleshooting communication problems, such as:

- Expired password notices
- Mailbox status information, such as batch ID numbers of recent transmissions

To determine what reports, if any, are available from your network, refer to your Log-on documentation or contact the network.

Internet e-mail messages are also stored as text documents.

### Viewing and Printing Text Documents



#### To view or print a text document from the Operations window

- 1 If the Properties Sheet is not visible, click **Properties Sheet** to display it.
- 2 Click the **Text Documents** folder located under **Support Folders**.  
Text documents are shown in the document list.
- 3 Select a document.  
The text is displayed on the Text Document Contents tab below the document list.
- 4 To wrap lines of text on the tab, right-click a line and select **Wrap Text**.

- 5 To print the document, click **Print**.

## Creating XML Documents

TrustedLink Windows can convert X12 and EDIFACT documents to eXtensible Markup Language (XML) format. XML provides a standard way to define the data structures and content of a document.

### Converting Documents to XML

#### To convert documents to XML from the Operations window

- 1 In any folder that contains X12 or EDIFACT documents, select all the documents to convert to XML format.
- 2 Right-click one of the selected documents. From the menu, click **Custom > Export EC Data To XML Files**.

Each selected document is converted to a separate XML file. TrustedLink Windows automatically assigns a name to each XML file, such as E2X00001.xml.

The XML files are saved in the WORK subfolder of your main TrustedLink Windows folder (C:\Program Files\Inovis\TrustedLink windows\WORK), unless to specified a different location in the Setup tab under Preferences.

TrustedLink Windows then launches Internet Explorer and displays an index of the XML documents created.

- 3 Click the links to display the individual documents in Internet Explorer.

### Viewing XML Documents

XML files are named with an .xml extension.

#### To view an XML document

- 1 From the Windows desktop or Windows Explorer, navigate to the folder containing the XML document.  
  
This is usually C:\Program Files\Inovis\TrustedLink windows\WORK. You may have created a different location in the Setup tab under Preferences.
- 2 Double-click the XML document.

The selected document opens in Internet Explorer.

### E-mailing or Copying XML Documents

#### To e-mail or copy a document converted to XML

You must include the XML style sheet as described in this procedure.

- 1 Using Windows Explorer, navigate to this directory:  
C:\Program Files\Inovis\TrustedLink windows\WORK
- 2 Select the document(s) with an .xml extension.
- 3 Ctrl-click the E2x.xml file to select it with the XML document(s).
- 4 Right-click and select **Copy**, or point to **Send To** and select an option.  
**Important:** Do not delete or remove the E2x.xml file from the WORK folder.



# Preparing Outgoing Documents

# 7

**T**his chapter describes the tasks required to prepare documents to send to a trading partner.

- “Methods of Preparing Electronic Documents” on page 137
- “Defining Outgoing Documents” on page 138
- “Assigning Forms Overlays and Maps” on page 139
- “Specifying Acknowledgment Options” on page 141
- “Data Entry” on page 141
- “Mapping and Document Turnaround” on page 153

## Methods of Preparing Electronic Documents

There are several ways to prepare electronic documents to send to your trading partners.

Method	Description
“Data Entry”	Creating documents by typing data from a keyboard.
“Mapping Flat Files to EDI Documents”	Creating documents from standard-format flat files generated by another application.
“Mapping Application Files to EDI Documents”	Creating documents from files generated by another application, using a custom File Map.
“Document Turnaround”	Creating outgoing documents by using data from incoming documents.

**Note:** Users of the optional Remote User Interface can create outbound documents from only the Data Entry function.

- “Before You Begin” on page 137
- “Trading Partner Definitions” on page 138

### Before You Begin

Before you prepare a document and send it to a trading partner, ensure these requirements have been met:

- A trading partner definition exists for the receiving trading partner. See Chapter 3, “Managing Trading Partners” on page 47, which describes how to create a new trading partner.

### To see the list of your trading partner definitions

Perform the appropriate action, either:



- In Administration, click **Trading Partners**.
- In Operations, click **Utilities > Trading Partner List**.

The trading partner definition includes a definition for the outgoing document. For instructions on how to check or create definitions for outgoing documents, see “Defining Outgoing Documents” on page 138.

The appropriate Forms Overlay, File Map, or Document Turnaround Map has been installed (merged) on your computer (see “Merging Forms, Log-ons, and Maps” on page 31) and assigned to the trading partner definition.

You can assign the above items as follows:

- While creating a new trading partner definition (see “Creating a New Trading Partner Definition” on page 47)
- After a trading partner definition has been created (see “Assigning Forms Overlays and Maps” on page 139).

Acknowledgment options for the outgoing document in the trading partner definition have been specified. See “Managing Acknowledgments” on page 220.

### Trading Partner Definitions

In TrustedLink Windows, the term *trading partner* has two meanings:

- An entity, such as a company, plant, store, government agency, or organization, with which you exchange e-Commerce documents.
- A collection of information, settings, map and form assignments, and other information about a specific trading partner. Called a *trading partner definition*, the information enables TrustedLink Windows to process the documents you exchange with the trading partner. Each entity with which you exchange e-Commerce documents must have a trading partner definition.

## Defining Outgoing Documents

The trading partner definition must include definitions for all documents you send to that trading partner. Unlike definitions for incoming documents, which TrustedLink Windows creates automatically, you must create definitions for *outgoing* documents manually.

**Note:** You can also define outgoing documents (and assign Forms Overlays and maps to them) at the same time you create a new trading partner definition. See “Creating a New Trading Partner Definition” on page 47.

### To define outgoing documents, or check for existing definitions

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.

**Note:** From the TrustedLink Windows Operations window, click **Go > Administration** (or press **F2**).



- 2 Click **Trading Partners** to display the trading partner list.
- 3 Select the trading partner, and click **Edit**.

The Trading Partner Control Panel opens.

- 4 In the Transaction Information or Message Information section, check the Maps/Forms column for outgoing document types.

If outgoing document types...	Do this:
Exist	<ol style="list-style-type: none"> <li>1 Select the document type.</li> <li>2 Click <b>Maps/Forms</b> to open the Map and Forms Assignments window.</li> <li>3 Go to “Assigning Forms Overlays and Maps” on page 139.</li> </ol>
Do not exist	Go to step 5.

- 5 Click **Add** in the Transaction Information or Message Information section.

The Select Documents window opens.

- 6 Select one or more document types from the list and click **Next**.

The Assign Overlays and Maps window opens.

- 7 Go to “Assigning Forms Overlays and Maps” on page 139.

## Assigning Forms Overlays and Maps

The Forms Overlays and maps on your system are listed in the Map and Forms Assignments window, or the Assign Overlays and Maps window.

- “Assigning Data Entry Overlays” on page 139
- “Assigning File Maps” on page 140
- “Assigning Document Turnaround Maps to Trading Partners” on page 140

### Assigning Data Entry Overlays

#### To assign Data Entry Overlays for data entry or flat-file-to-EDI mapping

- 1 Access either the Map and Forms Assignment or Assign Overlays and Maps window as described in “Defining Outgoing Documents” on page 138.

The appropriate window opens. The Map and Forms Assignment is shown here.

**2 Click the down arrow next to **Data Entry Overlay**.**

All Data Entry Overlays on your system for the selected document type are listed.

Example:

If the document type is 810 (X12 Invoice), only invoice Data Entry Overlays are shown in the list. If the Data Entry Overlay was provided by Inovis, its name resembles the following: OPO\_810\_D\_v3010\_OURPLACE\_980310.

The document type (810) is in the name, as well as the company for which it was created (Ourplace). The last six characters of the name indicate the date the Forms Overlay was created. If you have more than one version, you probably use the one with the latest date.

**3 Select a **Data Entry Overlay** from the list.**

If the Data Entry Overlay you need is not listed, be sure you selected the correct document type. If you did, the Data Entry Overlay has not been merged into your system. See “Merging Forms, Log-ons, and Maps” on page 31.

**4 If you plan to print documents, select a **Print Overlay** from the list.**

To cancel an assignment, click the blank line at the top of the dropdown.

### Assigning File Maps

**To assign an application file to EDI File Map**

- 1** Access either the Map and Forms Assignment or Assign Overlays and Maps window as described in “Defining Outgoing Documents” on page 138.

The appropriate window opens.

**2 Click the down arrow beside **Application to EDI File Map** and select a map.**

**3 Click **OK**.**

### Assigning Document Turnaround Maps to Trading Partners

**To assign forms overlays and maps for Document Turnaround**

- 1** Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.

**Note:** From the TrustedLink Windows Operations window, click **Go > Administration** (or press **F2**).



**2 Click **Trading Partners** to display the trading partner list.**

**3 Select the trading partner, and click **Edit**.**

The Trading Partner Control Panel opens.

**4 In the Transaction Information or Message Information section, select the *incoming* document type that will be used to generate the outbound document. Click **Maps/Forms**.**

The Map and Forms Assignments window opens.

**5 From the **Destination Trading Partner** dropdown in the Document Turnaround area, select the trading partner to which you are sending the turned-around document.**

**6 From the **Output EC Data** dropdown, select the *outgoing* document type.**

**7 From the **Turnaround Map Used** dropdown, click the down arrow.**

Even if you are assigning the map to the incoming document, its name contains only the code for the outgoing document.

Example:

If you are turning around a purchase order to create an invoice, and are using a Document Turnaround Map from Inovis, the map name resembles the following:

OPO\_INVOIC\_T\_v2.2\_OURPLACE\_980310.

The document type (EDIFACT message INVOIC) is in the name, as well as the company for which it was created (Ourplace). The last six characters of the name indicate the date the map was created. If you have more than one version you probably will use the one with the latest date.

- 8 From the Turnaround Map Used dropdown, select a Document Turnaround Map.

**Note:** If the Document Turnaround Map you need is not listed, be sure you selected the correct document type. If you did, then the Document Turnaround Map has not been merged into your system. See “Merging Forms, Log-ons, and Maps” on page 31.

- 9 Click **Add Assignment**.

The trading partner, destination document, and Document Turnaround Map you selected are shown at the bottom of the window. For example: Ourplace Outlets(INVOIC) - OPO\_INVOIC\_T\_v2.2\_OURPLACE\_980210.

- 10 Click **OK**.

On the Trading Partner Control Panel, the Maps/Forms columns lists a T (turnaround) next to the document type.

- 11 Perform the appropriate action:

If you want to...	Do this:
To turn around this incoming document to more than one: <ul style="list-style-type: none"> <li>■ Outgoing document (for example, turn a purchase order around to both an invoice and a purchase order acknowledgment), or</li> <li>■ Receiver (trading partner)</li> </ul>	Repeat steps 2 through 9 for each additional outgoing document.
Undo an assignment	Select the assignment and click <b>Remove Assignment</b> .

## Specifying Acknowledgment Options

You can decide to keep track of whether your outgoing documents are acknowledged by your trading partners. You specify that you want to track acknowledgments of outgoing documents in the trading partner definition.

See “Managing Acknowledgments” on page 220.

## Data Entry

Before you start Data Entry, complete the tasks in “Before You Begin” on page 137.

- “Understanding Data Entry Overlays” on page 142

- “Starting Data Entry” on page 142
- “Opening a Blank Data Entry Overlay” on page 143
- “Opening a Data Entry Overlay that is Not Assigned” on page 144
- “Completing Incomplete Documents” on page 144
- “Opening a Partially Filled Form” on page 145
- “Entering Data” on page 145
- “Finding Data” on page 148
- “Saving Data” on page 149
- “Data Entry Menu Commands”

### Understanding Data Entry Overlays

A Data Entry Overlay is a form (similar to a paper form) for typing data from the keyboard to create an e-Commerce document.

You must have a Data Entry Overlay for each document type you create for each trading partner. If you have several trading partners that represent divisions or locations of the same large company, you probably use the same Data Entry Overlays for all of them.

#### EXAMPLE

To send X12 invoices (810 document type) to Acme Corporation, you must use Acme Corporation’s Data Entry and Print Overlays for an 810 Invoice.

**Important:** A form for another company or a different type of document does not contain the right fields to create the invoice in the format Acme Corporation requires.

Before you can use a Data Entry Overlay, it must be:

- Installed (merged) on your system (see “Merging Forms, Log-ons, and Maps” on page 31).
- Assigned to the outgoing document type in the trading partner definition (see “Defining Outgoing Documents” on page 138)

You can download Data Entry Overlays for most trading partners from the Inovis Customer Portal at <https://customer.inovis.com>. See “Downloading Forms and Log-ons” on page 29.

### Starting Data Entry

#### To start Data Entry

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Operations**.

**Note:** From the TrustedLink Windows Administration window, click **Tools > TrustedLink Windows Operations** (or press F2).



- 2 Click **Data Entry**, or click **Go > Data Entry**.

The Data Entry window opens.

**3** Perform the appropriate action:

If you want to...	Select this option...	Go to this procedure...
Open a blank Data Entry Overlay	Blank Forms Overlay	"Opening a Blank Data Entry Overlay" on page 143
Enter data to complete an existing document	Incomplete EC Documents	"Completing Incomplete Documents" on page 144
Enter data into a form saved as a template	Open a Partially Filled Form	"Opening a Partially Filled Form" on page 145

To open a Data Entry Overlay that is not assigned to a trading partner, see "Opening a Data Entry Overlay that is Not Assigned" on page 144.

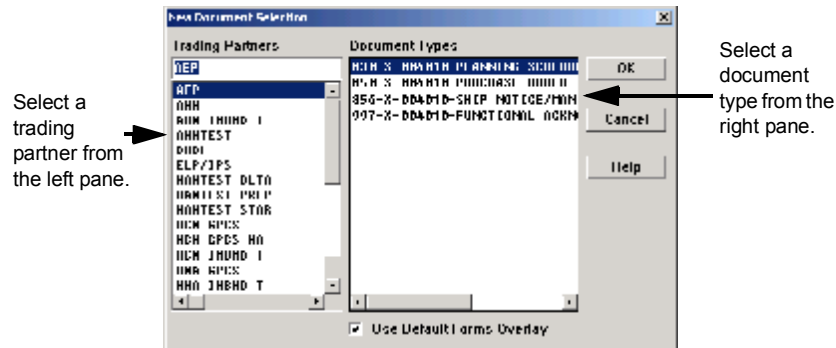
### Opening a Blank Data Entry Overlay

#### To open a blank Data Entry Overlay

**1** After starting Data Entry as described in "Starting Data Entry" on page 142, either:

- Select **Blank Forms Overlay**.
- Click **File > New**.

The New Document Selection window opens.



**2** Select the trading partner to receive the document, select the document type, and click **OK**.

If...	Do this:
A Data Entry Overlay is assigned to the trading partner	The Overlay opens and is ready for data entry. See "Entering Data" on page 145.
A Data Entry Overlay is not assigned	<p>The Overlay Selection window lists the installed Data Entry Overlays for the selected document type.</p> <p>Select the Data Entry Overlay.</p> <p><b>Note:</b> To permanently assign this Data Entry Overlay to a trading partner, click <b>Set Default</b>, then click <b>OK</b>.</p> <p>The Data Entry Overlay opens and is ready for data entry. See "Entering Data" on page 145.</p>

**3** After you fill out the form, go to "Saving Data" on page 149.

## Opening a Data Entry Overlay that is Not Assigned

### To open a Data Entry Overlay that is not assigned to the trading partner

- 1 After starting Data Entry as described in “Starting Data Entry” on page 142, click **File > New**.

The New Document Selection window opens.

- 2 Clear the **Use Default Overlay** check box, and click **OK**.

The Overlay Selection window opens. It shows all Data Entry Overlays for the selected document type that are installed on your system.

- 3 Select the **Data Entry Overlay**.

- 4 To assign this Data Entry Overlay as the new default, click **Set Default**.

- 5 Click **OK**.

The Data Entry Overlay opens and is ready for data entry (see “Entering Data” on page 145).

- 6 After you fill out the form, go to “Saving Data” on page 149.

## Completing Incomplete Documents

An *incomplete document* is an outgoing document that is not ready to send to a trading partner. These documents are stored in the *Incomplete* folder so they are not sent accidentally.

Incomplete documents can be caused by...	Description
Document Turnaround	After creating outgoing documents from incoming documents, you might need to complete some fields manually using Data Entry.
Flat File to EDI mapping Application File to EDI mapping	In some cases, the application that creates the input file cannot fill in all fields required for the outgoing document. Use Data Entry to add the missing data.
Miscellaneous sources	You might use the <i>Incomplete</i> folder as a temporary holding area for any document you do not want to send.  Example: You might discover an error in a document that was completed and placed in the <i>Out</i> folder. You can move the document to the <i>Incomplete</i> folder while you send the rest of your documents, then correct and resubmit the document later.

### To complete data entry for incomplete documents

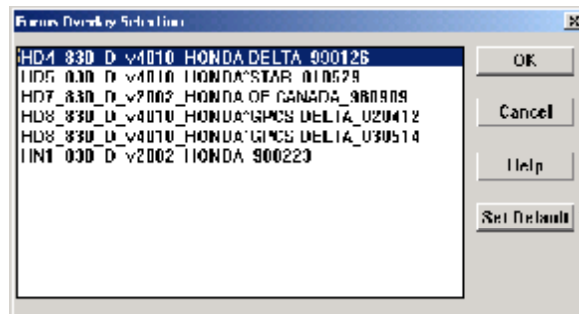
- 1 Find the incomplete document by performing the appropriate action. Either:



- Click Data Entry from the Operations menu, select **Open Incomplete Document**, select a document, and click **Edit**.
- In Data Entry, click **File > Incomplete Documents**, select a document, and click **Edit**.
- On the Operations window, either:
  - Select the **Incomplete** folder, right-click a document in the Documents List, and select **Complete Document**.
  - Click the **Find** icon (see “Finding Documents” on page 107).



- 2 If the Overlay Selection window opens, select a Data Entry Overlay, and click **OK**.



1 Click **Set Default** to use this Overlay every time you enter data for this trading partner and document type.

- 2 Click **OK**.

- 3 Enter the remaining data.
- 4 Go to “Saving Data” on page 149.

### Opening a Partially Filled Form

A partially filled form is a copy of a Data Entry Overlay you save along with its data (see “Saving as a Partially Filled Form”).

There are two reasons to save a partially filled form:

- You can stop entering data before you finish filling in the form, save the data you entered, and finish it later.
- If you always enter the same data in some fields, you can save time by saving a copy of the form as a template with those fields filled. Each time you open the copy, fill in the remaining data, and generate a document, the saved version of the form is unaffected.

#### To open a partially filled form

- 1 In Data Entry, click **File > Open**.

The partially filled forms in your Forms folder are listed.

- 2 Select the form and click **OK**.
- 3 Go to “Saving Data” on page 149.

### Entering Data

This section describes the process of entering data after you open a Data Entry Overlay:

- “Navigating a Data Entry Form” on page 145
- “Types of Fields” on page 146
- “Automatically Filled Fields” on page 146
- “Tables and Loops” on page 147
- “Entering Data in a Table” on page 147
- “Entering Data in a Loop Subform” on page 147

### Navigating a Data Entry Form

#### To move between fields on a Data Entry Form

Do any of the following:

- Click in any field.

- Press **Tab** after each field to move through the fields in order.
- Press **Shift-Tab** to move back one field.

**Note:** For each field, you can see the field's data element name in the status bar at the bottom of the form.

### Types of Fields

A Data Entry form can include the following types of fields:

**Mandatory fields** are yellow. You must enter information in mandatory fields.

**Optional fields** are green. You can either type information in them or leave them blank.

**Protected fields** are gray. You cannot type in these fields.

**Automatically filled fields** are light blue. TrustedLink Windows automatically enters information in these fields. See "Automatically Filled Fields" on page 146.

Use **Loop buttons** to open a loop subform. See "Entering Data in a Loop Subform" on page 147.

A Data Entry form might also include these fields:

Type of Field	Indicated By	What to Do
Valid values list	<p>A down arrow when the cursor is in the field.</p> <p>Example:</p>	<ol style="list-style-type: none"> <li>1 Click the down arrow or press the up or down arrows on the keyboard.</li> <li>2 Select one of the values in the list.</li> </ol>
Table	An area with heavy outlines, column headings, and scroll bars	Enter data as you do in non-table fields. See "Entering Data in a Table" on page 147.

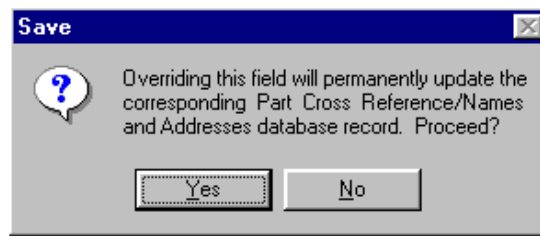
### Automatically Filled Fields

To save you from typing information each time you use a form, some fields might be automatically filled with data as soon as a related field has been filled.

#### EXAMPLE:

A form might automatically fill in a street address when you select a Ship To code from a dropdown. Depending on the form, this data can come from the Part Cross-Reference table or the Names and Addresses table in TrustedLink Windows Administration.

If necessary, you can add or change information in the Names and Addresses or Part Cross-Reference table while you are in Data Entry.



If you click **Yes**, the information is saved. If you click **No**, the information is discarded.

See “Part Cross-Reference Table” on page 205 and “Names and Addresses Table” on page 208.

### Tables and Loops

A **loop** is a segment, or a group of related segments, that can repeat multiple times in the document. One repetition of a loop is called an **iteration**.

A **table** is a loop in which an iteration can be entered on a single line.

#### EXAMPLE

Name and address loops are commonly found on forms. Every name and address contains the same fields (such as Name, Address 1, Address 2, City, State, Zip). If a document requires three addresses (such as Bill To, Ship To, and Contact), the name and address loop has three iterations.

### Entering Data in a Table

#### To enter data in a table

- 1 Tab or click in each field and type the information.

**Note:** In tables, you can see only one line at a time. Use the up and down scroll arrows to see other lines.

- 2 When you reach the last field, press **Enter** to start a new line, or **Tab** to exit the table.

If you have entered the maximum number of lines, pressing **Enter** takes you out of the table.

### Entering Data in a Loop Subform

More complex loops can contain individual fields, tables, and even other loops. Such loops require a **loop subform**.

#### To enter data in a loop subform

- 1 Click the loop graphic on the main form.

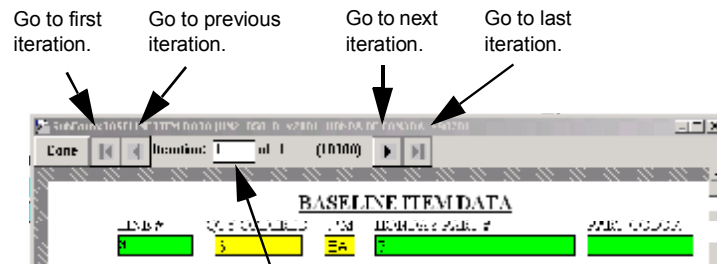


A loop subform opens in a new window.

- 2 Fill in the fields on the subform, including any tables and loops.
- 3 When the iteration is complete, click the right arrow button to go to the next iteration.

The iteration is saved, the subform is cleared, and the count increases by one.

- 4 Repeat steps 2 and 3 for as many additional iterations as needed.  
Use the loop navigation buttons to view the iterations you have already entered.



Shows the current iteration number, the total number of iterations entered, and the maximum number of iterations allowed.

**Note:** To delete the current iteration, go to the **Loop** menu on the main form and select **Delete**.

- 5 When all iterations are complete, click **Done** to close the subform and return to the main form.

### Finding Data

The Find options in Data Entry allow you to search the currently active form for:

- Element data
- EC item names
- Field aliases

Searches are case-sensitive. You can use wildcards, such as asterisk (\*), in any search, then press **F3** to find the next occurrence of the search criteria.

### Searching a Data Entry Form

#### To initiate a search in a data entry form



- 1 Open the data entry form.
- 2 Click **Find**, or select **Edit > Find First**.

The Search dialog box opens.

- 3 Type the information you want to find. For example, **AK101**.
- 4 Click **Find**.

The program searches your form and, if it finds your search criteria, highlights the information.

### Using Wildcards in a Search

#### To use wildcards in a search



- 1 Open the data entry form.
- 2 Click **Find**, or select **Edit > Find First**.

The Search dialog box opens.

- 3 Type the information you want to find, including the wildcard; for example, **BIG\***.
- 4 Click **Find**.  
The program searches your form and, if it finds your search criteria, highlights the information.
- 5 To find the next occurrence of the search criteria, press **F3**.

### Saving Data

You can save the information on a Data Entry form in two ways.

If...	Save the data as...
The information is complete and ready to send to your trading partner	A completed e-Commerce document. See "Saving as E-Commerce Data" on page 149.
You want to: <ul style="list-style-type: none"> <li>■ Save the document and complete the information later</li> <li>■ Create a template</li> </ul>	A partially filled form. See "Saving as a Partially Filled Form" on page 150.

**Note:** If more than one Remote User Interface user tries to save information on the same Data Entry form, only the first user can save the form. Other users must save the information using a different name.

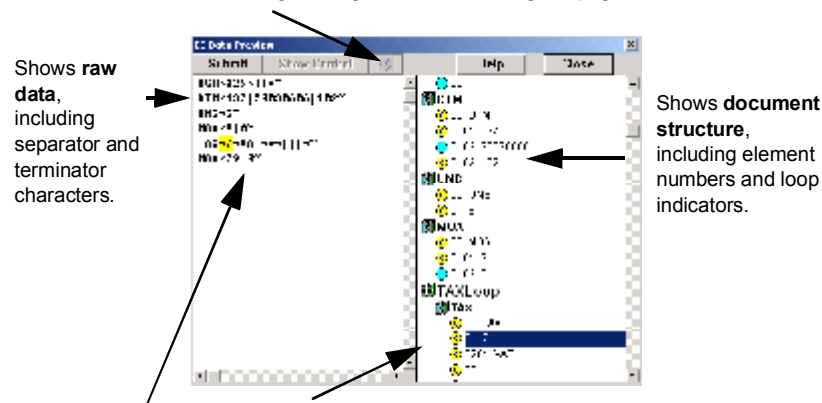
### Saving as E-Commerce Data

**To create an e-Commerce document from the data you entered**

- 1 In Data Entry, open a document.
- 2 Go to the **EC** menu > **Generate EC Data**.

The EC Data Preview window opens the document.

If mandatory fields are blank, a red exclamation mark displays. See "Resolving Missing Data When Saving" on page 150.



Click an item in one pane, and TrustedLink Windows highlights the corresponding item in the other pane.

- 3 From the **EC** menu, select **Generate and Submit EC Data**.
  - If all mandatory fields are filled, the document is placed in the out folder for transmission.

- If errors are found, the EC Data Preview window opens the document. Go to “Resolving Missing Data When Saving” on page 150.

### Resolving Missing Data When Saving

If mandatory fields are blank on the document, a red exclamation mark displays at the top of the EC Data Preview window. You must resolve the missing data before you submit the document.

### To locate and complete missing data in the EC Data Preview window



- 1 In Data Entry, open a document.
- 2 Go to the **EC** menu > **Generate EC Data**.
- 3 Click **Exclamation Mark** at the top of the EC Data Preview window.  
The first blank mandatory field is highlighted.
- 4 Click **Show Control**.  
The Data Entry form displays with a flashing cursor in the blank field.
- 5 Enter the required information.
- 6 From the **EC** menu, select **Generate EC Data**. If necessary, repeat the error resolution process.  
When all the missing data is completed, the red exclamation mark is no longer shown on the EC Data Preview window.
- 7 Click **Submit**.  
The document is placed in the Out folder for transmission.

### Saving as a Partially Filled Form

For examples of using partially filled forms, see “Opening a Partially Filled Form” on page 145.

### To save a partially filled form

- 1 When all the data to save is entered, click **File** > **Save As**.
- 2 Type a new name for the form (for example, Ourplace Partial Invoice, or Ourplace Invoice #20041). Select a folder if necessary.
- 3 Click **OK** to save the form and data together.

### Data Entry Menu Commands

This section describes the menu commands available in Data Entry:

- “File Menu” on page 151
- “Edit Menu” on page 151
- “EC Menu” on page 152
- “Loop Menu” on page 152
- “Configure Menu” on page 152
- “Tools Menu” on page 153

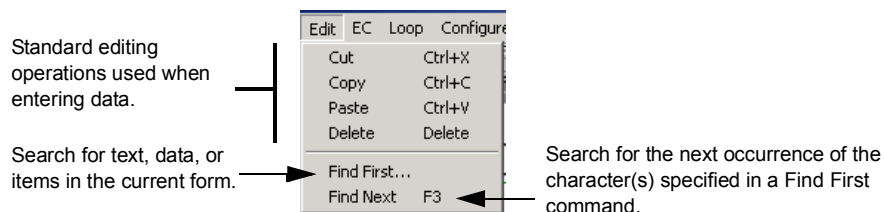
## File Menu

Use the **File** menu commands in Data Entry to perform these functions:

Command	Function
<b>New</b>	Open the New Document Selection window to select a trading partner and a Data Entry Overlay. Only Data Entry Overlays associated with the selected trading partner are listed.
<b>Open</b>	Open a partially filled form.
<b>Close</b>	Close the current form.
<b>Save</b>	Save the current form.
<b>Save As...</b>	Save the current form with a new name or location.
<b>Incomplete Documents</b>	Open a list of all documents in your Incomplete folder. If a Data Entry Overlay is associated with the trading partner and document type, it can be opened automatically from this window.
<b>Dump EC Data</b>	Write the data entered into the current form to an external file. The external file contains sequential, comma-delimited data.
<b>Delete</b>	Open a window for deleting a partially filled form.
<b>Merge</b>	Open a dialog box to select an extracted Forms Overlay file and merge its contents into TrustedLink Windows.  If a Forms Overlay currently exists with the same name as one being merged, you are prompted to rename the form or overwrite the existing form.
<b>Extract</b>	Select one or more Forms Overlays and extract them to an external file.
<b>Exit</b>	Exit Data Entry.

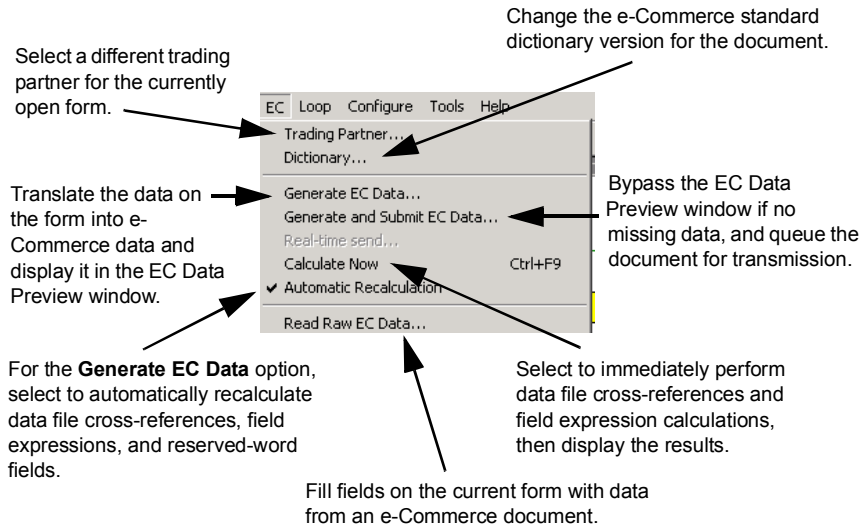
## Edit Menu

Use the **Edit** menu in Data Entry to perform these functions:



### EC Menu

Use the **EC** menu in Data Entry to perform these functions:

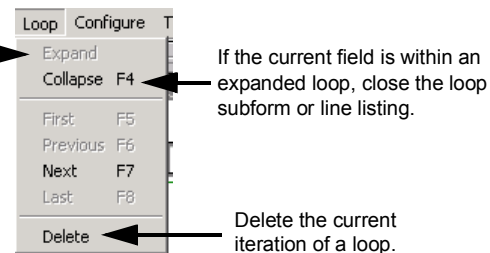


### Loop Menu

Use the **Loop** menu in Data Entry to perform these functions:

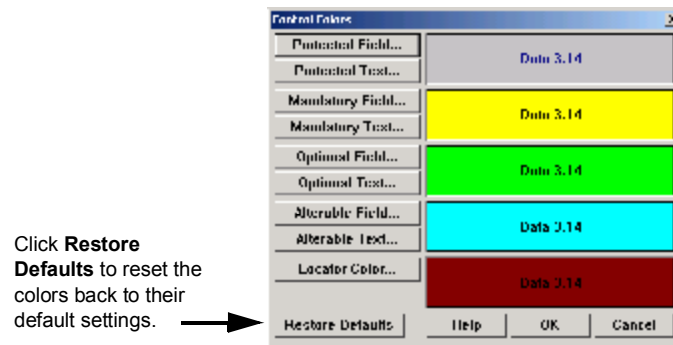
If the current field is within a loop, display the loop in expanded form, either a loop subform or line listing of loop entries.

Move the cursor to the first, next, previous, or last iteration of the current loop.



### Configure Menu

The **Configure** menu in Data Entry contains the **Colors** command, which opens the Configure Colors window.





Use this window to define default colors and background text for field types.

Field Type	Description	Default Color
Protected	No data can be entered.	Gray
Mandatory	Must be filled in to create a valid document.	Yellow
Optional	Can be left blank.	Green
Alterable	Linked to the Part Cross-Reference or Names and Addresses database.	Light Blue
Locator Color	Used with the Show Control command on the EC Data Preview window to highlight a field that contains an error.	Brown

### Changing Default Colors

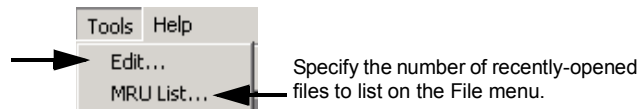
#### To change the default color of the field or the field text

- 1 In Data Entry, select **Configure > Colors**.
- 2 Click the appropriate button and select a new color.
- 3 Click **OK** twice.

### Tools Menu

Use the **Tools** menu in Data Entry to perform these functions:

Add commands to the Tools menu that launch other applications while you are in Data Entry: See "Adding Commands to the Tools Menu" on page 153.



### Adding Commands to the Tools Menu

#### To add commands to the Tools menu

- 1 In Data Entry, select **Tools > Edit**.  
The Tool Options window opens.
- 2 Select or enter options to add, remove, and arrange **Tools** menu commands.
- 3 Click **OK**.

## Mapping and Document Turnaround

This section contains instructions for creating outgoing documents using mapping or document turnaround.

- "Mapping Flat Files to EDI Documents" on page 153
- "Mapping Application Files to EDI Documents" on page 155
- "Document Turnaround" on page 159

### Mapping Flat Files to EDI Documents

Flat filing is a way to integrate EDI data between TrustedLink Windows and other applications. All you need to perform flat filing is a Data Entry or Print Overlay.

A flat file is a record-oriented, sequential text file formatted to be used by more than one software package. TrustedLink Windows can create flat files from EDI documents, and create EDI documents from flat files.

The process of converting documents from one format to the other is called *mapping*. A flat file can contain multiple documents of different types and associated with different trading partners.

For detailed information about the TrustedLink Windows flat file structure, naming convention, and terminology, see Appendix A "TrustedLink Windows Flat File Layout," on page 245.

- "Before You Begin" on page 154
- "Mapping Flat Files to EDI Documents" on page 154
- "Resolving Flat File Mapping Errors" on page 155

### Before You Begin

To map a flat file to EDI documents, you must first have the correct Data Entry or Print Overlay. If you have both types of Forms Overlays assigned, TrustedLink Windows uses the Data Entry Overlay.

Before you can use the Data Entry or Print overlays, you must:

- Install (merge) them on your computer (see "Merging Forms, Log-ons, and Maps" on page 31).
- Assign them to the outgoing document in the trading partner definition. See "Assigning Data Entry Overlays" on page 139.

**Important:** The trading partner name cannot be more than 12 characters long. See "Renaming a Trading Partner" on page 57.

### Mapping Flat Files to EDI Documents

#### To map flat files to EDI documents

- 1 Place the flat file in the directory specified in the Preferences options for the Flat File Directory (see "Setup Options" on page 110).

**Note:** The default path is C:\Program Files\Inovis\TrustedLink Windows\MAPDATA. The flat file must be named according to the naming convention described in Appendix A "TrustedLink Windows Flat File Layout," on page 245.

- 2 On the Operations window, click **Tools > Map Flat Files to EDI**.

TrustedLink Windows maps all flat files with the appropriate names in the MAPDATA directory. The flat files are renamed so they are not translated again.

Example:

If a flat file is named DX-FX-VF.080, TrustedLink Windows replaces the FX in the file name with ##. In this case, TrustedLink Windows renames the DX-FX-VF.080 file to mapped file DX-##-VF.080.

TrustedLink Windows places the mapped documents in the Out folder unless the flat file header record specifies partially complete flat files.

If the header record specifies partially complete flat files, TrustedLink Windows places the mapped documents in the `Incomplete` folder. See “Starting Data Entry” on page 142 for information on how to complete partial documents.

### Resolving Flat File Mapping Errors

If TrustedLink Windows encounters a header record with an error when performing flat file to EDI translation, it extracts that document to a Flat File Extract file. Only documents with errors are extracted; all others are mapped.

Extract files are named `EX-rfnnn.FTX`, where *rfnnn* are the same characters as in the original flat file name.

#### EXAMPLE

If the original flat file was named `DX-FX-VF.080` and an error occurs, TrustedLink Windows names the extract file `EXVF080.FTX`. The extract file is in the same format as the original file so you can correct the errors, then copy or rename the file so TrustedLink Windows can process it again. TrustedLink Windows appends (adds) any files containing incorrect flat file data to the existing extract files each time you perform flat file to EDI mapping.

### To view mapping errors

Click **View > Events**.

## Mapping Application Files to EDI Documents

An application file is a data file generated by an application, such as a mainframe system, spreadsheet, accounting package, or other business application. Application file mapping is more sophisticated and powerful than flat file mapping because the map is designed for the application file format, whereas the flat file is a more generic format.

- “Before You Begin” on page 155
- “Mapping Application Files to EDI Documents” on page 156
- “Verifying the Application File Name” on page 156
- “Exporting and Importing Header Layout Properties” on page 157

### Before You Begin

To map EDI documents to application files, you must first have a file map developed specifically for the document type, trading partner, and application. The File Map defines the relationship between each field in the document type and the application, including rules for processing and special calculations.

Before you can use a File Map, it must be:

- Installed (merged) on your computer (see “Merging Forms, Log-ons, and Maps” on page 31).
- Assigned to the outgoing document in the trading partner definition (see “Assigning File Maps” on page 140).

## Mapping Application Files to EDI Documents

### To map application files to EDI documents

- 1 Place the application file in the location specified in the map.

**Note:** The application file must be named as specified in the map. If you are not sure of the name, you can check it on the Operations window (see “Verifying the Application File Name” on page 156).

- 2 Click **Tools > Map Application File to EDI**.

The Map Application File to EDI window opens.

- 3 Select the map and click **OK**.

TrustedLink Windows creates EDI documents from the application file and places them in the out folder.

### Verifying the Application File Name

#### To verify the application file name required by a File Map



- 1 If the Properties Sheet is not visible on the Operations window, click **Properties Sheet** to display it.

- 2 Under **Support Folders**, select **Maps**.

All File Maps on your system are displayed in the document list area.

- 3 Select the map.

The application file name(s) are listed in the File Names box on the File Map Info tab.

### Exporting and Importing Header Layout Properties

Use the following procedures to export and import header layout properties. Export header layout properties as a text file. If your TLW database later becomes corrupted, you can import the header layout properties into the new database instead of manually recreating it.

#### To export Header Layout Properties

- 1 In Operations, click **Tools > Map Application File to EDI**.

The Map Application File to EDI dialog opens.

- 2 Select the application file you wish to work with to export header layout data.

- 3 Click **Header**.

The Header Layout Properties dialog opens.

- 4 Enter data. (All fields are required.)

- 5 Click **Export**.

A dialog opens.

Type a name and select a location for the text file that will contain the data in the Header Layout Properties dialog.

- 6 Click **Save**.

The data is exported in the text file.

The following example shows the file format:

```
RecIdPos=32, RecIdLen=4, RecIdVal=newval
TpPos=555, TpLen=55
TpHead=value2, TpName=Acme
TpHead=value2, TpName=ACME_CORP
TransPos=6666, TransLen=666
TransHead=value3, TranType=810
TransHead=value4, TranType=850
```

#### To import Header Layout Properties

- 1 In Operations, click **Tools > Map Application File to EDI**.

The Map Application File to EDI dialog opens.

- 2 Select the application file you wish to work with to import header layout data.

- 3 Click **Header**.

The Header Layout Properties dialog opens.

- 4 Click **Import**.

The Open dialog displays.

Browse to the location of the text file containing the header layout data you wish to import.

- 5 In the Open dialog, select the file and click **Open**.

TLW imports the data into the Header Layout Properties dialog.

When you click **OK** in the Header Layout Properties dialog, TLW saves the data to your database.

**Note:** The format of the file must be the same as described in the “To export Header Layout Properties” on page 157.

### Mapping Application Files to EDI Using Multiple Maps

You can map an application file that uses more than one map for processing. The application file can use maps created by either TrustedLink Windows Mapper (STMAP) or Mapper (formerly Catalyst:Map).

The application file must include the header record for each document type:

- For an STMAP mapping, add only one line containing the header identifier, trading partner header value, and transaction header value to the application file.
- For a Mapper mapping, add a complete source file to the application file.

The first header record must be the first record in the application file.

Before mapping an application file, assign the outgoing document to the trading partner definition. see “Assigning File Maps” on page 140.

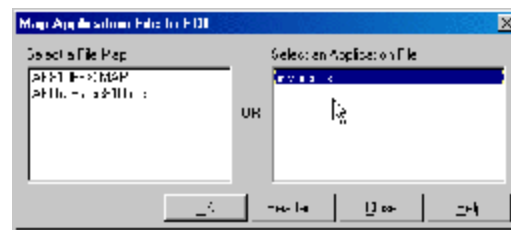
### To map an application file that uses multiple maps

- 1 In TrustedLink Windows Operations, click the **Tools** menu and select **Map Application File to EDI**.

The Map Application File to EDI dialog box opens.

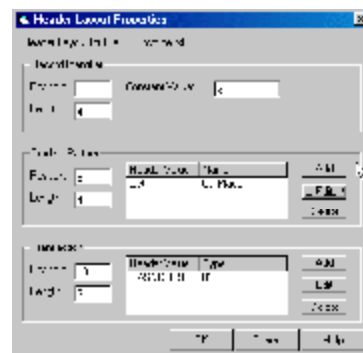
This example shows the two types of maps that are compatible with TrustedLink Windows:

- A map created with STMAP (.MAP).
- A map created with Mapper (.met)



- 2 Select an application file and click **Header**.

The Header Layout Properties dialog box opens.



- 3 Type the Record Identifier fields: Position, Length, and Constant Value.
- 4 Click **Add** in the Trading Partner area.

The Trading Partner window opens.



- 5 Type the Header Value to define an alias and select the trading partner Name from the dropdown, then click **OK**.

The Header Layout Properties dialog box reopens.

- 6 Type the Position and Length for the trading partner.
- 7 Click **Add** in the Transaction area.



- 8 Type the Header Value to define an alias and select the document Type from the dropdown.
- 9 Click **OK** to return to the Header Layout Properties dialog box.
- 10 Type the Position and Length for the transaction, and click **OK**.

TrustedLink Windows creates EDI documents from the application file and places them in the Out folder.

## Document Turnaround

Document Turnaround is a step-saving process that automatically creates outgoing e-Commerce documents from data in incoming documents. You can use an incoming document to create one or more outgoing documents.

### EXAMPLE

You can use an incoming purchase order to create both a purchase order acknowledgment and an invoice for the items ordered. You can send the outgoing document(s) back to the sender, or to any other trading partner on your system.

- “Before You Begin” on page 159
- “Examples - Document Turnaround Map Assignments” on page 160
- “Performing Document Turnaround” on page 161
- “Data Entry for Turned-Around Documents” on page 162

### Before You Begin

Document Turnaround requires a Document Turnaround Map developed specifically for a trading partner and the document types they use. The map passes the data from fields in the incoming document to the appropriate fields in the outgoing document.

Document Turnaround Maps are provided on Inovisworks. You can also create them using the Turnaround Editor in TrustedLink Windows Forms. See the *TrustedLink Windows Forms User Guide* on the **Help** menu.

Before you can use a Document Turnaround Map, it must be:

- Installed (merged) on your computer (see “Merging Forms, Log-ons, and Maps” on page 31).
- Assigned to the incoming document in the trading partner definition. See “Assigning Document Turnaround Maps to Trading Partners” on page 140.

In addition, the outgoing document and the receiving trading partner must be specified (see “Defining Outgoing Documents” on page 138).

In most cases, a Data Entry Overlay is also required because an incoming document usually does not contain all the information needed for the outgoing documents. You must perform additional data entry to complete the documents.

The Data Entry Overlay must be assigned to the outgoing document for the receiving trading partner.

#### Examples - Document Turnaround Map Assignments

These examples show combinations of Forms Overlay and Document Turnaround Map assignments on the Trading Partner Control Panel.

- “Same trading partner for incoming and outgoing documents.” on page 160
- “Different trading partners for incoming and outgoing documents.” on page 161

#### SAME TRADING PARTNER FOR INCOMING AND OUTGOING DOCUMENTS.

This example shows the assignments for a Document Turnaround operation in which the same trading partner sends the incoming purchase order and receives the turned-around invoice.

Shows the forms assignment for the incoming purchase order: P (Print Overlay) and T (Document Turnaround Map).

Type	Version	Name	Maps/Forms
810	3050	INVOICE	D
850	3050	PURCHASE ORDER	PT

Shows the forms assignment for the outgoing invoice: D (Data Entry Overlay)



**DIFFERENT TRADING PARTNERS FOR INCOMING AND OUTGOING DOCUMENTS.**  
This example shows the assignments for a Document Turnaround operation in which one trading partner sends the purchase order and a different trading partner receives the turned-around invoice.

Shows the forms assignment for the incoming purchase order for the sending trading partner: P (Print Overlay) and T (Document Turnaround Map).

Type	Version	Name	Maps/Forms
850	3050	PURCHASE ORDER	PT

Shows the forms assignment for the outgoing invoice for the receiving trading partner: D (Data Entry Overlay).

Type	Version	Name	Maps/Forms
810	3050	INVOICE	D

## Performing Document Turnaround

### To use incoming documents to create outgoing documents

- 1 On the Operations window, either:
  - Select the **In** folder, and select one or more documents in the document list.

**Note:** The Turned Around column in the document list contains a check mark if the document has been turned around. Click the column heading to sort turned-around documents.

  - Perform a Find operation, and select one or more documents in the Find E-Commerce Documents window (see “Finding Specific Documents” on page 107).



### 2 Click **Document Turnaround**.

The Document Turnaround window opens.

### 3 You can keep the defaults and click **OK** to start Document Turnaround, or:

If...	Do this:
Additional data entry is required before you send the turned-around documents	<ol style="list-style-type: none"> <li>1 Select the <b>Edit Document(s) Before Sending</b> option.</li> <li>2 Click <b>OK</b>.</li> </ol>
You want to send the documents after they are created	<ol style="list-style-type: none"> <li>1 Select the <b>Queue Document(s) to Send Immediately</b> option.</li> <li>2 Click <b>OK</b>.</li> </ol>
You want to start Data Entry after the Document Turnaround operation is complete	<ol style="list-style-type: none"> <li>1 Select the <b>Launch Data Entry After Complete</b> check box</li> <li>2 Click <b>OK</b>.</li> </ol>

### 4 If you selected:

- **Edit Document(s) Before Sending** in step , TrustedLink Windows creates the incomplete documents and places them in the **Incomplete** folder. See “Data Entry for Turned-Around Documents” on page 162.

- Queue Document(s) to Send Immediately in step , TrustedLink Windows places the turned-around documents in the Out folder.

If you specified multiple turnaround assignments for a document in the trading partner definition, TrustedLink Windows creates all outgoing documents when you perform the document turnaround operation. You do not need to repeat the turnaround operation for each document.

#### **Data Entry for Turned-Around Documents**

If you selected the Edit Document(s) Before Sending option when performing a Document Turnaround operation, TrustedLink Windows creates incomplete documents and places them in the Incomplete folder. The Incomplete Documents window opens. It lists the documents just created, including any other documents in your Incomplete folder.

To complete the documents later, click **Close**.

#### **To complete data entry for a turned-around document**

- 1 Select a document from the Incomplete Documents window, and click **Edit**.
- 2 If the Overlay Selection window opens, select a Data Entry Overlay. To use this Overlay every time you enter data for this trading partner and document type, click **Set Default**. Click **OK** to continue.

The Data Entry Overlay opens with the data from the selected incomplete document displayed in the appropriate fields.

- 3 Enter the remaining data.
- 4 Save the document. See “Saving Data” on page 149.

The Incomplete Documents window opens after you submit the completed document. Completed documents are removed from this list.

- 5 Either select another document to complete, or close the window.



#### **To open the Incomplete Documents window again**

Click **Incomplete Documents** in Data Entry.

**Y**ou can automate routine tasks in TrustedLink® Windows by using scripts.

**Note:** This information applies to TrustedLink Windows only, not the optional Remote User Interface.

- “Overview” on page 163
- “Building and Editing Scripts” on page 164
- “Using Attributes to Select Documents for Processing” on page 168
- “Scheduling and Running a Script” on page 173
- “Script Commands” on page 176

A reference to the available script commands, includes:

- “Basic Script Commands” on page 177
- “Communications Script Commands” on page 178
- “Document Administration Script Commands” on page 178
- “Document Mapping Script Commands” on page 184
- “Utilities Script Commands” on page 186
- “Using Scripts from STX 3.1 or Earlier” on page 187

## Overview

You can automate routine tasks in TrustedLink Windows by executing them in batches (several operations in sequence) or at pre-set times.

For example, if you normally start the day by sending the documents you prepared yesterday, receiving today’s documents, and printing them out, you can create a script (a series of commands) that accomplishes these tasks while you attend to other work.

With the Script Scheduler, you can run a script on selected days of the week or month, and at selected times of the day. For example, you can schedule a script to carry out the same tasks at midnight, when communications rates are lower and nobody else needs the printer.

The script and its schedule are saved together, and can be run whenever needed.

These script functions are available:

- Communications (sending and receiving)
- Printing documents
- Viewing documents

- Archiving, moving, and deleting documents
- Document turnaround and mapping
- Saving raw e-Commerce data
- Reporting and other administrative options

## Building and Editing Scripts

This section describes how to create, edit, and save scripts:

- “Before You Begin Building a Script” on page 164
- “Starting the Script Editor” on page 164
- “Adding a New Script” on page 165
- “Adding a Command to a Script” on page 165
- “Deleting a Command” on page 166
- “Changing the Command Order” on page 166
- “Saving and Closing a Script” on page 167
- “Opening an Existing Script” on page 167
- “Editing a Command” on page 167
- “Renaming a Script” on page 168

### Before You Begin Building a Script

Before you build a script, decide the following:

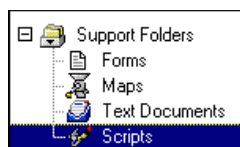
- The tasks that the script must perform.
- The order in which the tasks are to occur.
- The schedule for the script (see “Scheduling and Running a Script” on page 173).

You can place different tasks that run on the same schedule in one script. Parts of a script cannot be run on different schedules.

### Starting the Script Editor

#### To start the Script Editor

- 1 In the Operations window, click the **Scripts** folder under **Support Folders**.



Scripts on your system are listed in the document list in the right pane.

- 2 To access the script commands, right-click any script. If the script list is empty, click the **Documents** menu.

## Adding a New Script

### To add a new script

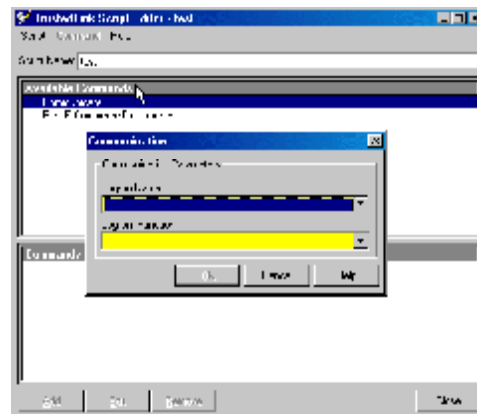
- 1 In the Operations window, click the **Scripts** folder under **Support Folders**.  
Scripts on your system are listed in the document list. If you have not created any scripts, the list is empty.
- 2 Do one of the following:
  - Right-click any script in the document list and select **New**.
  - If the list is empty, click the **Documents** menu, point to **New**, and select **Script**.

The Enter Script Name dialog box opens.
- 3 Type a descriptive name for the new script and click **OK**.  
The Script Editor opens in a new window.
- 4 Continue with “Adding a Command to a Script” on page 165.

## Adding a Command to a Script

### To add a command to a script

- 1 Double-click a heading in the Script Editor window to display the available commands.  
For a list of available commands and their options, see “Script Commands” on page 176.



- 2 If the script already contains commands, select the line *before* the point where the new command is to be added in the Commands in Selected Script pane.
- 3 Double-click a command.

A dialog box lists the fields for each command option. A yellow field background indicates the field is mandatory. For example, here are script options for the **Print E-Commerce Documents** command:



- 4 If you add a command that requires attributes, click the ellipsis button (...) to open the Expression Builder. Follow the instructions for “Using Attributes to Select Documents for Processing” on page 168.

If applicable, see also “Adding a Comment to a UOP Script” on page 188.

- 5 Select the options for the command and click **OK**.

The command is added underneath the highlighted line in the Commands in Selected Script pane.

- 6 Click the **Script** menu and select **Save**, or select **Close** to save the script and close the Script Editor window.

## Deleting a Command

### To delete a command from a script

In the Script Editor window, select the command in the Commands in Selected Script pane, and click **Remove**.

**Important:** Any command that includes attributes is shown as two lines in the script. You must delete both lines. The first line begins with `LOCATE` and contains the specified attributes, and the second line specifies the operation (such as `PT_LOCATE` for printing). See “Using Attributes to Select Documents for Processing” on page 168.

## Changing the Command Order

Commands are run in the same order in which they are placed in the script.

### To move a command to a different position

Select the command and do one of the following:

To move the selected command...	Press this key:
To the beginning of the script	F5
Up one line	F6
Down one line	F7
To the end of the script	F8

**Important:** Any command that specifies attributes is shown as two lines in the script. You must move both lines. The first line begins with `LOCATE` and contains the specified attributes, and the second line specifies the operation (such as `PT_LOCATE` for printing). See “Using Attributes to Select Documents for Processing” on page 168.

### Saving and Closing a Script

#### To save a script

- 1 Click the **Script** menu and select **Save**.
- 2 When you finish editing the script, select **Close** to save the script and close the Script Editor.

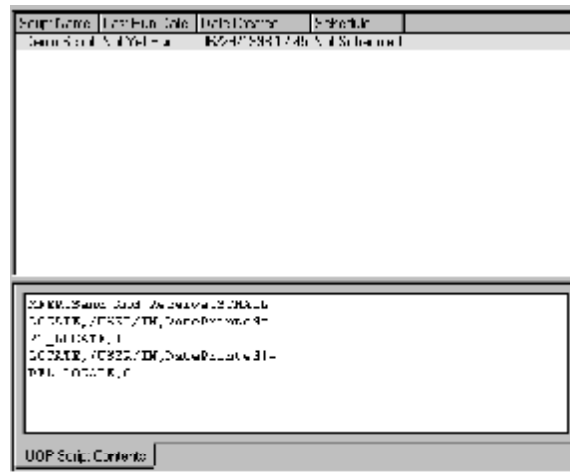
### Opening an Existing Script

#### To open an existing script for viewing or editing

- 1 In the Operations window, click the **Scripts** folder under **Support Folders**.
- 2 Select the script in the document list.

**Note:** To view the entire schedule if the Schedule column truncates the display, double-click the column heading.

The Properties Sheet displays the contents of the script, as shown in the following example:



- 3 Double-click the script.

The Script Editor window displays the script.

**Note:** You can right-click the script, point to **Edit Using** and select **Script Editor**.

### Editing a Command

#### To edit an existing command

- 1 In the Script Editor window, select the command in the Commands in Selected Script pane.
- 2 Click **Edit**.  
The command editing dialog box for that command opens.
- 3 Enter the new values or selections in the command fields, and click **OK**.  
The command is updated.

## Renaming a Script

### To rename a script

- 1 Open the script in the Script Editor.
- 2 Replace the name in the Script Name field.
- 3 Save the script.  
The script name is changed.
- 4 To see the new name in the scripts list in the Operations window, click the **View** menu and select **Refresh**.

## Using Attributes to Select Documents for Processing

To select documents to be processed by script commands, you must specify selection criteria in the form of *document attribute* values. The Expression Builder provides a quick way to do this.

This section is organized as follows:

- “What are Document Attributes?” on page 168
- “Viewing Document Attributes” on page 168
- “Using Document Attributes in Script Commands” on page 168
- “Using the Expression Builder to Add Attributes” on page 169
- “Document Attributes” on page 170

### What are Document Attributes?

Document attributes include the identification and status information that are shown in the Operations window, such as type, date, document number, or control number.

Documents also have several other attributes that are not displayed in the Operations window, but contain information about the document. You might never use some of these attributes, but many are especially useful in script commands.

The Expression Builder displays attribute descriptions. For a complete list of document attributes and valid attribute values, see “Document Attributes” on page 170.

### Viewing Document Attributes

#### To view a document’s attributes

Select the document in the Operations window and click **Document Attributes**.

The attributes are shown in a new window.

### Using Document Attributes in Script Commands

The following table shows examples for using attributes in script commands:

To select these documents...	Use this attribute and value:	Which means:
Documents that have not been printed	DatePrinted=	The date printed is blank. The DatePrinted field is not populated until you print the document.
Documents that have been printed	DatePrinted!=	The date printed is not blank.



To select these documents...	Use this attribute and value:	Which means:
Documents sent before a given date	TransmitDate<20060601000000	The date transmitted is before midnight on June 1, 2006.
All documents in a folder	Type <b>ALL</b> in the Attributes field.	ALL is a custom attribute that applies only to scripts. The ALL attribute is not available in the Expression Builder.

### Using the Expression Builder to Add Attributes

When you add a command requiring attributes to a script, you can use the Expression Builder to fill in the attribute list. A basic expression consists of an attribute, an operator, and a value.

Using the Expression Builder is not required. If you know the attribute and value, you can type them in the Attributes field.

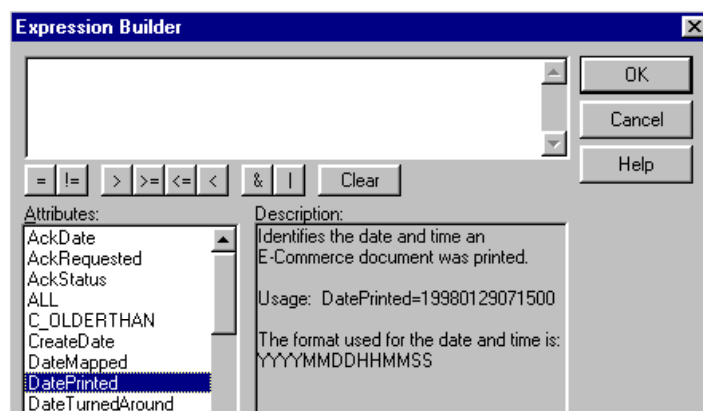
#### EXAMPLE

In the following procedure, examples are provided for specifying all documents sent before June 1, 2006: TransmitDate<200606010000001

### To add an attribute expression to a script

- 1 In the Script Editor window, double-click the command in the Available Commands list.
- 2 Click the ellipsis button (...) beside the Attributes field.

The Expression Builder opens.



- 3 To see a description of an attribute and a list of applicable values, click the attribute in the Attributes list.
- 4 Double-click the attribute to use in this command. For example, double-click **TransmitDate**.

The attribute displays in the expression box.

- 5 Click one of the operator buttons:

Operator	Description
=	Equal to
!=	Not equal to
>	Greater than

Operator	Description
>=	Greater than or equal to
<	Less than
<=	Less than or equal to

Example: Click < (less than).

The operator is added to the expression box.

- 6 Type the value after the operator. To specify documents with a blank value for the attribute, do not type a value. For example, type **20020601000000**.
- 7 To specify more than one attribute, click either & (and) or | (or), and repeat steps 4 through 6.

Example:

To specify a date range, type:

**TransmitDate>=20060601000000&**

**TransmitDate<=20060630115959**

This specifies all documents sent between June 1–30, 2006.

- 8 To correct a mistake, delete it. To erase the expression to start over, click **Clear**.
- 9 Click **OK** to complete the expression.

The expression displays in the Attributes field.

### Document Attributes

The following table lists all document attributes and their possible values:

Attribute	Description and Values
AckDate	Date and time that acknowledgments were created, in YYYYMMDDHHMMSS format
AckRequested	Acknowledgment Requested indicator: Y—Acknowledgment requested N—Acknowledgment not requested
AckStatus	Acknowledgment status: A—Acknowledged E—Accepted with errors P—Partially accepted (used only with EDIFACT messages) N—Not acknowledged R—Rejected
CreateDate	Date and time the transaction/message was created, in YYYYMMDDHHMMSS format
DateMapped	Date and time the transaction/message was first mapped, in YYYYMMDDHHMMSS format
DatePrinted	Date and time the transaction/message was first printed, in YYYYMMDDHHMMSS format
DateTurnedAround	Date and time the transaction/message was first turned around, in YYYYMMDDHHMMSS format
DecimalChar	Decimal character, entered in hexadecimal format

Attribute	Description and Values
DocNum1	The document number, or the first part of the document number if the document number is longer than 15 characters Values for this attribute are created from: <ul style="list-style-type: none"> <li>■ The data on incoming documents</li> <li>■ Designated fields in documents from Data Entry or Document Turnaround</li> <li>■ The flat file or application file on translated documents</li> </ul>
DocNum2	The second document number, or the overflow if the value used for DocNum1 was longer than 15 characters and no other value was specified for DocNum2 Values for this attribute are created from: <ul style="list-style-type: none"> <li>■ The data on incoming documents</li> <li>■ Designated fields in documents from Data Entry or Document Turnaround</li> <li>■ The flat file or application file on translated documents</li> </ul>
EnvelopeType	ISA—X12 Interchange GS—X12 Functional Group ST—X12 Transaction Set UNB—EDIFACT Interchange UNG—EDIFACT Functional Group UNH—EDIFACT Message INTACK—Acknowledgment (temporary internal storage)
ENVID	Envelope profile ID
Header	Envelope header ID: ISA—X12 Interchange header GS—X12 Functional Group header ST—X12 Transaction Set header UNB—EDIFACT Interchange header UNG—EDIFACT Functional Group header UNH—EDIFACT Message header INTACK—Acknowledgment (temporary internal storage)
IsAcknowledgement	Indicates whether the transaction or message is an acknowledgment: Y—Acknowledgment N—Not an acknowledgment
Level1Separator	Data element separator character, entered in hexadecimal format
Level2Separator	Data sub-element separator character, entered in hexadecimal format
Reference	Control number or reference number
Release	Standards release ID
ReleaseChar	Release character, entered in hexadecimal format
SegmentTerminator	Segment terminator character, entered in hexadecimal format
Standard	Standards ID
Subset	Standards subset ID

Attribute	Description and Values
TestFlag	Test/production flag: T—Test P—Production
TPID	Trading partner profile ID This is not the trading partner name.
Trailer	Envelope trailer ID: IEA—X12 Interchange trailer GE—X12 Functional Group trailer SE—X12 Transaction Set trailer UNZ—EDIFACT Interchange trailer UNE—EDIFACT Functional Group trailer UNT—EDIFACT Message trailer INTACK—Acknowledgment (temporary internal storage)
TransCode	Document type (such as 850 or INVOIC)
TransmitDate	Date and time the transaction or message was transmitted, in YYYYMMDDHHMMSS format
TransmitStatus	Transmission status: Q—Queued R—Re-queued S—Sent successfully C—Received successfully
Version	Standards version ID

## Scheduling and Running a Script

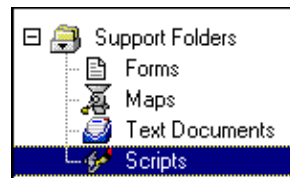
### To manually run a script or set a recurring schedule

To run a script...	Use this method:
Only when you give the command	<ol style="list-style-type: none"> <li>1 In the Operations window, select the <b>Scripts</b> folder and select the script.</li> <li>2 Click <b>Run Script</b>.</li> </ol> <p>See “Running a Script with the Run Command” on page 173.</p>
On a recurring schedule	<ol style="list-style-type: none"> <li>1 Set up a schedule using the Script Schedule editor. See “Setting Up a Script Schedule” on page 173.</li> <li>2 Leave your computer on with the Script Scheduler running.</li> </ol> <p>See “Running Scheduled Scripts” on page 176.</p>

### Running a Script with the Run Command

#### To run a script one time and only when you give the command

- 1 In the Operations window, click the **Scripts** folder under **Support Folders**.



Your scripts are shown in the document list.

- 2 Select the script and click **Run Script**.

The commands are executed in the order in which they occur in the script.

### Setting Up a Script Schedule

If you do not specify time exclusions, the default start time is midnight on the dates you specify.

#### To set up a schedule for a script

- 1 In the Operations window, click the **Scripts** folder under **Support Folders**.

Your scripts are shown in the document list.

- 2 Right-click the script and select **Set Schedule**.

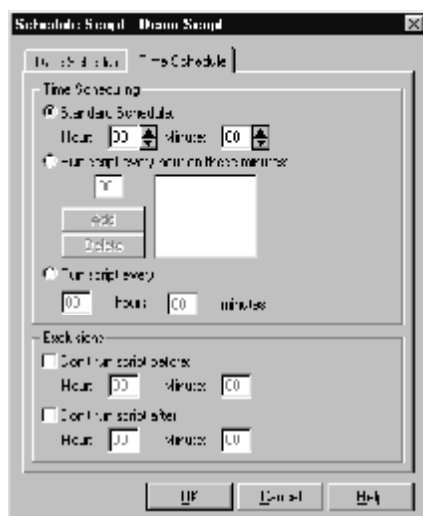
The Schedule Script dialog box displays the Date Schedule tab.



**3** Select the days on which to run the script:

To run the script...	Do this:
Every day	Select <b>Every day</b> .
On the same days each week	Select <b>These days</b> and select the days of the week.
On the same days each month	<ol style="list-style-type: none"> <li>1 Select <b>These days of the month</b>.</li> <li>2 Type a day of the month in the small box.</li> <li>3 Click <b>Add</b>.</li> </ol> <p>The day is shown in the large box.</p> <p><b>To remove a day from the schedule:</b> Select the day and click <b>Delete</b>.</p>
On the last day of the month	<p>To run the script on the last day of the month, add <b>31</b> to the list of days.</p> <p>Select the <b>Skip Days not in Month</b> check box to run the script on the 28th, 29th, 30th, or 31st of a month.</p>
On the specified days, beginning on a specified date	<ol style="list-style-type: none"> <li>1 Under Exclusions, select <b>Don't run script before</b>.</li> <li>2 Click the ellipses button (...) and select the starting date from the calendar.</li> </ol>
On the specified days until a specified date	<ol style="list-style-type: none"> <li>1 Under Exclusions, select <b>Don't run script after</b>.</li> <li>2 Click the ellipses button (...) and select the ending date from the calendar.</li> </ol>

- 4 Click the Time Schedule tab.



- 5 Select the times to run the script:

To run the script...	Do this:
Once each day that it is scheduled	<ol style="list-style-type: none"> <li>1 Select <b>Standard Schedule</b>.</li> <li>2 Type the time (hour and minute, 24-hour format) in the boxes, or click the up and down arrows to select a time. For midnight, use 00 00.</li> </ol>
On an hourly schedule, one or more times per hour	<ol style="list-style-type: none"> <li>1 Select <b>Run script every hour on these minutes</b>.</li> <li>2 Type the number of minutes past the hour in the small box and click <b>Add</b>.</li> </ol> <p><b>Note:</b> To run on the hour and half-hour, add 00 and 30.</p> <p><b>To remove a time:</b> Select the time in the large box and click <b>Delete</b>.</p>
At a specified interval	<ol style="list-style-type: none"> <li>1 Select <b>Run script every</b>.</li> <li>2 Type the interval in the Hour and Minute boxes.</li> </ol>
At the times indicated, beginning at a specified time	<ol style="list-style-type: none"> <li>1 Under Exclusions, select <b>Don't run script before</b>.</li> <li>2 Type the starting Hour and Minute.</li> </ol>
At the times indicated, until a specified time	<ol style="list-style-type: none"> <li>1 Under Exclusions, select <b>Don't run script after</b>.</li> <li>2 Type the ending Hour and Minute.</li> </ol>

- 6 After setting both the days and the times, click **OK**.

The Schedule Script editor closes and your schedule displays in the Schedule column in the Operations window.

If you did not specify exclusions, the default start time is midnight on the dates selected on the Date Schedule tab.

### Running Scheduled Scripts

The Script Scheduler continually checks all scheduled scripts and runs them at the specified times. TrustedLink Windows does not have to be running in order for the Scheduler to run scripts, but the computer must remain on.

You can set the Script Scheduler to start each time you start Windows.

#### To automatically run the Script Scheduler

- 1 In the Operations window, click **Documents** and select **Preferences**.
- 2 On the General tab, select **Run Script Scheduler when Windows starts**.

Beginning with the next time you start Windows, the Script Scheduler runs whenever Windows is running. It is minimized on your desktop.

#### To manually start the Script Scheduler

In the Operations window, click **Utilities** and select **Start Script Scheduler**.

#### To close the Script Scheduler

Click the **TrustedLink Scheduler** icon on the Windows taskbar, then click **Close**.

### Stopping a Running Script

While a script is running, the Command Line Processor displays on the Windows taskbar. To stop a running script, click and close the Command Line Processor. The existing script schedule information is not affected.

### Discontinuing a Schedule

#### To discontinue a script's schedule

In the Operations window, right-click the script and select **Unschedule**.

The schedule information is deleted. To run the script again, repeat the scheduling process for "Setting Up a Script Schedule" on page 173.

### Viewing Script Results

Script operations do not display Results windows as they are executed.

To view the results of script operations, view or print the Command Line log in the Log File Viewer. See "Viewing a Log File" on page 229.

## Script Commands

The remaining sections of this chapter describe the basic script commands in the Script Editor, including the available fields and the information to supply for each.

For information about the actual functions performed by the various commands, see the corresponding sections of this manual. In general, the commands work the same way as their Operations window equivalents.

These basic commands are available without the full Task Automation package:

- "Communicate" on page 177
- "Print Documents" on page 178



The commands available with the full Task Automation package are described after the basic commands. In the Script Editor, the Task Automation commands are grouped.

Task Automation	Commands
"Communications Script Commands"	Communicate Audit Raw EC File Bundle Outgoing EC Data
"Document Administration Script Commands"	Archive Documents Delete Documents (includes text documents option) Move Documents Print Documents View Documents Turnaround Documents Report Acknowledgment Status Report Document Status Update Interchange Status
"Document Mapping Script Commands"	Map EDI to Application File Map Application File to EDI Map EDI to Flat File Map Flat File to EDI Send to External Program Receive from External Program
"Utilities Script Commands"	Execute External Program Output Raw EC Print Text Documents Custom Application

### Basic Script Commands

The basic script commands are:

- Communicate
- Print Documents

### Communicate

The Communicate command includes the following options:

Option	Description
Log-on Name	Select a Log-on from the dropdown of all Log-ons on your system. <b>Note:</b> You can set a default Log-on in the General tab under <b>Documents &gt; Preferences</b> . The default Log-on is highlighted in a list, making it easier to find.
Log-on Function	Select a function from the dropdown of the functions supported by the selected Log-on.

### Print Documents

The Print Documents command includes the following options:

Option	Description
Folder	Select the folder that contains the documents to print.
Attributes	Specify which documents to print. See “Using Attributes to Select Documents for Processing” on page 168.
Print Overlay	To print using a Data Entry Overlay, select Data Entry Overlay. Ordinarily you only do this if you did not have the appropriate Print Overlay.

### Communications Script Commands

The communications commands are:

- Communicate
- Audit Raw EC File
- Bundle Outgoing EC Data

#### Communicate

The Communicate command includes the following options:

Option	Description
Log-on Name	Select a Log-on from the dropdown of all Log-ons on your system.
Log-on Function	Select a function from the dropdown of functions supported by the selected Log-on.

#### Audit Raw EC File

The Audit Raw EC File command includes the following options:

Option	Description
E-Commerce Source	Type the full path and file name of the file to be audited, or click the ellipsis button (...) to select it.
Log-on Name	Select a Log-on from the dropdown of all Log-ons on your system. Any new trading partners created from the audited data is associated with this Log-on. If the file contains data for an existing trading partner definition, be sure to select the Log-on associated with that trading partner.

#### Bundle Outgoing EC Data

The Bundle Outgoing EC Data command includes the following option:

Option	Description
Log-on Name	Select a Log-on from the dropdown of all Log-ons on your system. All documents in your Out folder that are associated with this Log-on are bundled.

### Document Administration Script Commands

The document administration commands are:

- “Archive Documents” on page 179

- “Delete Documents” on page 179
- “Move Documents” on page 180
- “Print Documents” on page 181
- “View Documents” on page 181
- “Turnaround Documents” on page 181
- “Report Acknowledgment Status” on page 181
- “Report Document Status” on page 183
- “Update Interchange Status” on page 184

### Archive Documents

The **Archive Documents** command includes the following options:

Option	Description
Folder	Select the folder that contains the documents to archive.
Attributes	Specify which documents to archive. See “Using Attributes to Select Documents for Processing” on page 168 for instructions.
Archive Name	Type a new file name or select the name of an existing archive file. If no file name is specified, a file name is created based on the current date and time plus a sequential number, in the format YYMMDDnn.mdb. You can specify only a path, and the archive file is placed in that directory with the default file name. If the file name argument is blank, the archive file is named C:\YYMMDDnn.mdb. The default file name option can be used with the CreateDate or TransmitDate attributes to regularly archive documents that are a specified number of days old.

### Delete Documents

Unlike deleting documents in the Operations window, documents you delete using a script are not be sent to the **Trash** folder, regardless of your **Trash** settings. The **Delete Documents** command includes the following options. (For deleting text documents, see “Delete Text Documents” on page 180.):

Option	Description
Folder	Select the folder that contains the documents to delete.
Attributes	Specify which documents to delete. See “Using Attributes to Select Documents for Processing” for instructions.
Delete Option	Specify which of the following to delete: <ul style="list-style-type: none"> <li>■ Transaction Only—Delete individual documents.</li> <li>■ Entire Interchange—Delete the interchanges that contain the specified documents.</li> </ul>

### DELETE TEXT DOCUMENTS

The **Delete Documents** command as used to delete text documents includes the following options (Notes explain options for deleting documents):

Option	Description
Folder	Select /USER/TXT.
Attributes	<p>Either leave <b>All</b> selected (to delete all text documents) or select either of the following to delete text documents based on date:</p> <ul style="list-style-type: none"> <li>■ <b>CreateDate</b> – Identifies the date and time the text documents were created.</li> <li>■ <b>TransmitDate</b> – Identifies the date and time the text documents were transmitted.</li> </ul> <p>If you select <b>CreateDate</b> or <b>TransmitDate</b>, see “Using Attributes to Select Documents for Processing” on page 168 to specify date parameters for the script. Special characters in the script examples below are defined in “To add an attribute expression to a script” on page 169).</p> <p>For example:</p> <ul style="list-style-type: none"> <li>■ LOCATE,/USER/TXT,CreateDate&gt;=20081130010101&amp;CreateDate&lt;20081202010101 DEL_LOCATE,0</li> <li>■ LOCATE,/USER/TXT,CreateDate=20081130010101&amp;CreateDate=20081202010101 DEL_LOCATE,0</li> <li>■ LOCATE,/USER/TXT,CreateDate!=20081130010101&amp;CreateDate!=20081202010101 DEL_LOCATE,0</li> <li>■ LOCATE,/USER/TXT,CreateDate&gt;=20081130010101 TransmitDate&lt;20081202010101 DEL_LOCATE,0</li> </ul> <p>Note: You must enter the hours, minutes, and seconds manually (in the examples above, 010101).</p>
Delete Option	Delete Option is not available for deleting text documents.

### Move Documents

The **Move Documents** command includes the following options:

Option	Description
Source Folder	Select the folder that contains the documents to move.
Destination Folder	Select the folder to which the documents are to be moved.
Attributes	<p>Specify which documents to move.</p> <p>See “Using Attributes to Select Documents for Processing” on page 168 for instructions.</p>
Move Option	<p>Specify which of the following to move:</p> <ul style="list-style-type: none"> <li>■ <b>Transaction Only</b>—Move individual documents.</li> <li>■ <b>Entire Interchange</b>—Move the interchanges that contain the specified documents.</li> </ul>

### Print Documents

The **Print Documents** command includes the following options:

Option	Description
Folder	Select the folder that contains the documents to print.
Attributes	Specify which documents to print. See “Using Attributes to Select Documents for Processing” on page 168 for instructions.
Print Overlay	To print using a Data Entry Overlay, select Data Entry Overlay. Ordinarily you only do this if you did not have the appropriate Print Overlay.

### View Documents

The **View Documents** command includes the following options:

Option	Description
Folder	Select the folder that contains the documents to preview.
Attributes	Specify which documents to preview. See “Using Attributes to Select Documents for Processing” on page 168 for instructions.
Overlay Used To Print	To preview using a Data Entry Overlay, select Data Entry Overlay. Ordinarily you only do this if you did not have the appropriate Print Overlay.

### Turnaround Documents

The **Turnaround Documents** command includes the following options:

Option	Description
Source Folder	Select the folder that contains the documents to turn around.
Destination Folder	Select the folder where the turned-around documents are to be placed.
Attributes	Specify which documents to turn around. See “Using Attributes to Select Documents for Processing” on page 168 for instructions.

### Report Acknowledgment Status

The **Report Acknowledgment Status** command produces a flat file report of document acknowledgment status. There are several options for selecting which documents to include in the report:

Option	Description
Folder	Select the folder that contains the documents to include in the report.
Document Type	To include documents of only one type, enter the type code here (such as 810 or INVOIC). If no document type is specified, all document types are included.

Option	Description
Status	<p>To include documents based on one transmission status, select the status from the dropdown:</p> <p>Q—Queued</p> <p>R—Re-queued</p> <p>S—Sent successfully</p> <p>C—Received successfully</p> <p>If no status is specified, documents are included regardless of transmission status.</p>
Interchange Acknowledgment Status	<p>To include documents based on interchange acknowledgment status, select a status from the dropdown:</p> <p>A—Accepted</p> <p>R—Rejected</p> <p>E—Accepted with errors</p> <p>N—Not acknowledged yet</p> <p>If no status is specified, documents are included regardless of interchange acknowledgment status.</p>
Group Acknowledgment Status	<p>To include documents based on group acknowledgment status, select a status from the dropdown.</p> <p>Status values are the same as for interchange acknowledgments.</p> <p>If no status is specified, documents are included regardless of group acknowledgment status.</p>
Document Acknowledgment Status	<p>To include documents based on document acknowledgment status, select a status from the dropdown.</p> <p>Status values are the same as for interchange acknowledgments.</p> <p>If no status is specified, documents are included regardless of document acknowledgment status.</p>
Report Filename	<p>Type a location and file name for the report.</p> <p>If no location is given, the file is placed in the \WORK folder in the main TrustedLink Windows directory.</p> <p>If no name is given, the file is named RAS_RPT.DAT.</p>
Append	<p>Select whether to append the report file if it already exists:</p> <p>Y—Append file</p> <p>N—Overwrite file</p>

The layout of the report file produced by the **Report Acknowledgment Status** command is:

Field	Start Position	Length	Data Type
Incoming/Outgoing	1	1	AN
Transaction Code	2	6	AN
Trading Partner	8	12	AN
Document Number 1	20	15	AN
Document Number 2	35	15	AN
Document Sequence No.	50	4	AN
Transmission Date	54	6	AN (yymmdd)
Transmission Time	60	4	AN (hhmm)

Field	Start Position	Length	Data Type
Transmission Status	64	1	AN
Interchange ACK Date	65	6	AN (yymmdd)
Interchange ACK Time	71	4	AN (hhmm)
Interchange ACK Status	75	1	AN
Group ACK Date	76	6	AN (yymmdd)
Group ACK Time	82	4	AN (hhmm)
Group ACK Status	86	1	AN
Document ACK Date	87	6	AN (yymmdd)
Document ACK Time	93	4	AN (hhmm)
Document ACK Status	97	1	AN
Interchange Control/Reference Number	98	14	AN
Group Control/Reference Number	112	14	AN
Document Control/Reference Number	126	14	AN

### Report Document Status

The **Report Document Status** command produces the same report as the **Report Acknowledgment Status** command, minus the acknowledgment dates and times and the control/reference numbers. The options for this command are the same as for the “Report Acknowledgment Status” on page 181 command.

This table shows the layout of the report file produced by the **Report Document Status** command:

Field	Start Position	Length	Data Type
Incoming/Outgoing	1	1	AN
Transaction Code	2	6	AN
Trading Partner	8	12	AN
Document Number 1	20	15	AN
Document Number 2	35	15	AN
Document Sequence No.	50	4	AN
Transmission Date	54	6	AN (yymmdd)
Transmission Time	60	4	AN (hhmm)
Transmission Status	64	1	AN
Interchange ACK Status	65	1	AN
Group ACK Status	66	1	AN
Document ACK Status	67	1	AN

### Update Interchange Status

The **Update Interchange Status** command either resets the transmission status of an outbound interchange, or deletes the entire interchange. The **Update Interchange Status** command includes the following options:

Option	Description
Folder	Select the folder that contains the interchanges.
Log-on Name	Select the Log-on associated with the interchanges.
Interchange Reference	Type an interchange control/reference number, or an asterisk (*) for all interchanges.
Transmission Status Flag	Select the transmission status to assign to the selected interchange(s), or D to delete the interchange(s): R—Requeued S—Transmitted D—Delete interchange

### Document Mapping Script Commands

Script commands can only append (add) new documents to existing files. If you clear the **Append** options in **Preferences** for application or flat files, the documents are still appended and the files are not overwritten if the task is completed with a script. See also “Miscellaneous Options” on page 112.

The document mapping script commands are:

- “Map EDI to Application File” on page 184
- “Map Application File to EDI” on page 184
- “Map EDI to Flat File” on page 185
- “Map Flat File to EDI” on page 185
- “Send to External Program” on page 185
- “Receive from External Program” on page 186

### Map EDI to Application File

The **Map EDI to Application File** command includes the following options:

Option	Description
Folder	Select the folder that contains the documents to map.
Attributes	Specify which documents to map. See “Using Attributes to Select Documents for Processing” on page 168.

### Map Application File to EDI

The **Map Application File to EDI** command includes one option:

Option	Description
Map Name	Select the map to run from the list of Application to EDI File Maps on your system.



### Map EDI to Flat File

The **Map EDI to Flat File** command includes the following options:

Option	Description
Folder	Select the folder that contains the documents to map.
Attribute	Specify which documents to map. See "Using Attributes to Select Documents for Processing" on page 168.
Sort Output By	Indicate one or more attributes by which to sort the documents in the flat file. If this field is blank, documents are not sorted. Click the ellipsis button (...) to display the Sort By Builder window. Double-click an attribute to add it to the sort list. Click the & button to separate the operands.
Append Flat File	Check this box to append to the flat file if it exists. If it is cleared, the existing flat file is overwritten.

### Map Flat File to EDI

The **Map Flat File to EDI** command includes one option:

Option	Description
Flat File	Type the path and file name of the flat file to be mapped, or click the ellipsis button (...) to select it.  If this field is blank, the file must be in the MAPDATA subdirectory of the main TrustedLink Windows directory, and be named according to the convention described in Appendix A "TrustedLink Windows Flat File Layout," on page 245.

### Send to External Program

The **Send to External Program** command creates a file of e-Commerce documents, and then invokes an application to process the file. This command is included for the benefit of those who used it in STX/Windows to map EDI documents to application files. It has been replaced by the **Map EDI to Application File** command, which is easier to use.

The **Send to External Program** command includes the following options:

Option	Description
External Program/Parameters	Type the command to execute the external program, and any parameters it requires.
Send File Name	Type the name of the file to be passed to the external program, or click the ellipsis button (...) to select it.
Append Flag	Select whether to append the send file if it exists: Y—Append file N—Overwrite file
Log-on Name	Select the Log-on associated with the documents to include in the send file.
Folder	Select the folder that contains the documents to include in the send file.
Process Flag	Select whether or not to include documents that have already been processed: Y—Include documents that have been processed N—Do not include documents that have been processed I—Include documents regardless of processing status

### Receive from External Program

The **Receive from External Program** command invokes an application to create a file of e-Commerce documents, then merges them into TrustedLink Windows for outbound transmission. This command is included for the benefit of those who used it in STX/Windows to map application files to EDI documents. It has been replaced by the **Map Application File to EDI command**, which is easier to use.

The Receive from External Program command includes the following options:

Option	Description
External Program/Parameters	Type the command to execute the external program, and any parameters it requires.
Receive File Name	Type the name of the file produced by the external program, or click the ellipsis button (...) to select it.
Append Flag	Select whether to append the application file if it exists: Y—Append file N—Delete application file before invoking external program

### Utilities Script Commands

The utilities script commands are:

- “Execute External Program” on page 186
- “Output Raw EC” on page 186
- “Print Text Documents” on page 187
- “Custom Application” on page 187

### Execute External Program

The **Execute External Program** command runs an external program or executes a DOS command. This command includes the following options:

Option	Description
Command Line	Type the command to execute the external program, and any parameters it requires. You can also click the ellipsis button (...) to select an executable.
Wait Flag	Indicate whether or not to wait to continue the script until the program has terminated: <ul style="list-style-type: none"> <li>■ Y—Wait until the program or command terminates before continuing</li> <li>■ N—Continue as soon as the program or command is initiated</li> </ul>

### Output Raw EC

The **Output Raw EC** command saves documents to an external file in raw e-Commerce data form. This command includes the following options:

Option	Description
Folder	Select the folder that contains the documents to save as raw e-Commerce data.
Attributes	Specify which documents to save. See “Using Attributes to Select Documents for Processing” on page 168 for instructions.

Option	Description
Sort Output By	Indicate one or more attributes by which to sort the documents in the file.  Click the ellipsis button (...) to display the Sort By Builder window. Double-click an attribute to add it to the sort list. Click the & button to separate the operands.  If this field is blank, documents are not sorted.
Output File Name	Either accept the default file name shown, or type a new one.
Include Wraps in Output	Check this box to include the envelope segments in the file.  If this is blank, only individual document data is included.

### Print Text Documents

Use the **Print Text Documents** command to print text documents stored in your TrustedLink Windows document database. Text documents are selected from your **In** folder. The Print Text Documents dialog box contains two print parameters:

Option	Description
Log-On Name	Select the Log-on associated with the documents to print.  If left blank, no documents are excluded based on Log-on.
Attributes	Indicate the date attributes for selecting the documents to print.  If left blank, no documents are excluded based on their attributes.  Two attributes are available: <ul style="list-style-type: none"> <li>■ <b>CreateDate</b> – Identifies the date and time the text documents were created.</li> <li>■ <b>TransmitDate</b> – Identifies the date and time the text documents were transmitted.</li> </ul> The greater than and less than signs must be used to determine the time boundaries for these documents.

### Custom Application

Use the **Custom Application** command to select a custom application during scripting process:

Option	Description
Folder	Select the folder containing the documents to process.
Attributes	Specify which documents to process.  See “Using Attributes to Select Documents for Processing” on page 168.
Custom Application	Select the custom application to use.  Important: On the Document Information and Interchanges pane in Operations, right-click a document and select <b>Custom</b> to view the available custom applications. Only those applications are listed in this field.

## Using Scripts from STX 3.1 or Earlier

If you used Unattended Operations (UOP) or Communications Scheduler scripts in previous versions (3.1 or earlier) of STX<sup>®</sup>/Windows, you can continue to use them by importing them into the Script Editor. You can then schedule, edit, and run them with Task Automation.

The advantages of the Task Automation function are:

- No need to memorize commands and parameters

- Quick document attribute reference with Expression Builder
- Easier and more flexible scheduling
- Viewer shows list of all scripts and commands in selected script

This section is organized as follows:

- “Importing a Script from Earlier Versions” on page 188
- “Adding a Comment to a UOP Script” on page 188
- “Scheduling Imported Scripts” on page 190

### Importing a Script from Earlier Versions

Note the following when importing a UOP script file:

- The first line in the file cannot be a comment line or a blank line. The first line must begin with the following: [VERSION]1.0.
- The script cannot contain blank lines.

### To import an Unattended Operations or Communications Scheduler script

- 1 In the Operations window, go to the **Documents** menu, point to **New**, and select **Script from Existing UOP Script**.

The Locate Existing UOP Script window opens.

- 2 Select the script.

The Enter Script Name window opens.

- 3 Type a descriptive name for the script and click **OK**.

The new name is shown in the document list. When it is selected, its contents are shown in the Properties Sheet.

- 4 To add a comment to a UOP script, see “Adding a Comment to a UOP Script” on page 188.

- 5 Schedule the script if it used scheduling commands in Unattended Operations or Communications Scheduler.

See “Scheduling Imported Scripts” on page 190 and “Setting Up a Script Schedule” on page 173.

### Adding a Comment to a UOP Script

Use the following procedure to add a comment before a command line in a UOP script after importing the script into TLW.

To import a UOP script, see “Importing a Script from Earlier Versions” on page 188.

See also “Adding Comments to a UOP Before Importing into TLW” on page 189.

### To add a comment to a UOP script after importing

- 1 In TLW Operations, under Support Folders, click **Scripts**.

A list of scripts displays.

- 2 Right-click the script you wish to add a comment to, then select **Edit Using > Default Editor**.

The script opens in a text editor such as Notepad.

```
File Edit Format View Help
[VERSION]1.0
EXECUTE,C:\PROGRAM FILES\INOVIS\TRUSTEDLINK\BIN\MRGPROG.EXE "C:\PROGRAM FILES\I
AUDIT,C:\PROGRAM FILES\INOVIS\TRUSTEDLINK\WORK\BADEDI2.TXT,IWORKS
BUNDLE,IWORKS
```

- 3 In the text editor, at the beginning of the Command Line field where you wish to place a comment, type -- (that is, “dash dash” with no spaces between the two dashes) and then type your comment text. (You do not have to use dashes after the comment text, but you can if you wish.)

For example:

```
File Edit Format View Help
[VERSION]1.0
-- This is for testing comments --
-- To create a TP
EXECUTE,C:\PROGRAM FILES\INOVIS\TRUSTEDLINK\BIN\MRGPROG.EXE "C:\PROGRAM FILES\I
--To audit in a test file
AUDIT,C:\PROGRAM FILES\INOVIS\TRUSTEDLINK\WORK\BADEDI2.TXT,IWORKS
--To bundle the outbound FA
BUNDLE,IWORKS
```

- 4 Save your changes and close the text editor.
- 5 To view your changes, in TLW Scripts click the script and examine the Script Contents section, as in the example below:

Script Name	Last Run Date	Date Last Modified ▲	Schedule
text doc delete	11/21/2008 15:35	11/21/2008 15:35	Not Scheduled
map	Not Yet Run	11/21/2008 16:31	Not Scheduled
test text	Not Yet Run	11/24/2008 09:36	Not Scheduled
test	Not Yet Run	11/24/2008 15:45	Not Scheduled
test2	Not Yet Run	03/05/2009 12:30	Not Scheduled
123	Not Yet Run	03/12/2009 14:48	Not Scheduled
NoCom	Not Yet Run	03/12/2009 15:01	Not Scheduled

```
-- This is for testing comments --
-- To create a TP
EXECUTE,C:\PROGRAM FILES\INOVIS\TRUSTEDLINK\BIN\MRGPROG.EXE "C:\PROGRAM FILES\In...
--To audit in a test file
AUDIT,C:\PROGRAM FILES\INOVIS\TRUSTEDLINK\WORK\BADEDI2.TXT,IWORKS
--To bundle the outbound FA
BUNDLE,IWORKS
```

Script Contents

### Adding Comments to a UOP Before Importing into TLW

The previous procedure describes how to add comments to a UOP script after importing it into TLW. However, you can add comments to the file before importing, if you wish, and then import the file.

The following example shows the same UOP script as that contains comments, which must begin with -- (that is, “dash dash” with no spaces between the two dashes) and then your comment text. (You do not have to use dashes after the comment text, but you can if you wish.):

```
[VERSION]1.0
-- This is for testing comments --
```

```
-- To create a TP
EXECUTE,C:\PROGRAM FILES\Inovis\TRUSTEDLINK\BIN\MRGPROG.EXE "C:\PROGRAM
FILES\Inovis\TRUSTEDLINK\WORK\FA_TP.MRG",Y
--To audit in a test file
AUDIT,C:\PROGRAM FILES\Inovis\TRUSTEDLINK\WORK\BADEDI2.TXT,IWORKS
--To bundle the outbound FA
BUNDLE,IWORKS
```

**Note:** When importing a UOP file that contains comments, TLW may display a message box that notes that a comment caused an error in the import. Ignore the message; the script will import with the comments intact.

### Scheduling Imported Scripts

When you import a script from Unattended Operations or Communications Scheduler, any scheduling information from the script is not carried over into Task Automation.

For the script to run at a scheduled time, you must set the schedule with the Script Editor. Follow the instructions for “Setting Up a Script Schedule” on page 173.

To find the schedule used by the old script, print or view the script using a text editor such as Notepad. The following information can help you determine the script’s schedule.

#### Example: UOP Scheduling Parameters

The following is an example of an entire UOP command with scheduling parameters:

Scheduling parameters

```
050630,060000,2,HH, 980701,055959,XFER,Receive Only,HCS
```

This command connects to the HCS network and executes a Receive Only function every two hours beginning at 6:00 A.M. on June 30, 2005 and stopping at 5:59 A.M. on July 1, 2005.

The scheduling parameters, separated by commas, are:

- Start Date
- Start Time
- Repeat Interval
- Repeat Interval Unit
- Cutoff Date
- Cutoff Time

The following table shows typical UOP commands and how to re-create them in the Script Editor:

Example UOP command	Description	Schedule in Script Editor
991630,060000,XFER,...	On or after a specific date and time	Specify the Start Date and Start Time only.

Example UOP command	Description	Schedule in Script Editor
990630,060000,15,MM,XFER,...	On or after a specific date and time, and repeat the command at specified intervals until you stop it	Specify the start date and time, along with a repeat interval and unit.
990630,060000,2,HH,990701,055959,XFER,...	At a specified interval during a specified time period	Specify the start date and time, the repeat interval and unit, and the cutoff date and time.

### UOP Scheduling Parameter Rules

The following rules applied to scheduling parameters:

- The scheduling parameters were placed on the same line as the UOP command, before the command name. Each command was scheduled individually.
- All dates are in YYMMDD format. Times are in military format (HHMMSS, for example 8:00 A.M. is 080000, 1:00 P.M. is 130000).
- Valid repeat units included the following:
  - MM—Minutes
  - HH—Hours
  - DD—Days
  - WK—Weeks
  - MN—Months
- For a specified Start Date, Repeat Interval, or Cutoff Date, the Start Time, Repeat Interval Unit, or Cutoff Time was also specified.
- For a specified Repeat Interval, the Start Date and Time were also specified.
- For a specified Cutoff Date and Time, the Start Date, Start Time, Repeat Number, and Repeat Interval were also specified.





# Advanced Document Management

# 9

**T**his chapter covers the following topics:

- “Using Folders to Organize Documents” on page 193
- “Interchanges” on page 195
- “Deleting Interchanges and Documents” on page 197
- “Backing Up the TrustedLink Windows Database” on page 199
- “Backing Up Other Data” on page 200
- “Archiving and Restoring Documents” on page 200
- “Exporting and Importing EDI Files” on page 202

## E-Commerce Documents

E-Commerce documents have a fairly short useful lifetime, usually the time between being created and sent from one trading partner until the order is filled by the other.

Remove documents when they are no longer needed to avoid taking up disk space and slowing down your system’s processing time.

**Important:** Inovis strongly recommends you do not store more than 5,000 documents in any one folder.

To remove documents, you can either:

- Delete documents to remove them permanently.
- Archive documents to a file from which you can restore them if necessary.

TrustedLink® Windows does not remove documents automatically.

## Using Folders to Organize Documents

You can create your own subfolders within the standard TrustedLink Windows document folders (the first group of folders in the left pane of the Operations window). Folders can help organize documents by date, trading partner, or other useful criteria. TrustedLink Windows does not automatically add documents to, remove documents from, or act upon documents in folders you create.

The following folder options are covered in this section:

- “Creating a Folder” on page 194
- “Deleting a Folder” on page 194
- “Copying and Moving Documents between Folders” on page 194
- “Viewing a Summary of Folder Contents” on page 195
- “Emptying a Folder” on page 195

### Creating a Folder

You can create subfolders only inside the standard document folders (In, Out, Incomplete, Sent, and Trash) or inside other folders you created.

**Note:** Remote User Interface users cannot create folders.

#### To create a folder

- 1 On the Operations window, right-click a folder name and select **Create Subfolder**.



- 2 Type a name for the new folder, and click **OK**.

**Note:** Folder names cannot contain apostrophes (’), quote marks (”), or slashes (/).

The new folder is listed under the selected document folder:



### Deleting a Folder

**Note:** Remote User Interface users cannot delete folders.

#### To delete a folder

Right-click it and select **Delete Folder**.

Regardless of your Trash settings, the folder and its contents are permanently removed.

You cannot delete the standard folders In, Out, Incomplete, Sent, or Trash.

### Copying and Moving Documents between Folders

TrustedLink Windows and Remote User Interface users can copy and move documents between folders.

#### To copy or move documents between any of the document folders

- 1 Select the folder containing the document(s) to move or copy.
- 2 In the document list, select one or more documents.
- 3 Right-click the selection and select **Send To**.

The Select Destination Folder window opens, showing all document folders on your system.

**4** Select the folder to which you plan to move or copy the document(s).

**5** Under Operation, select either **Move** or **Copy**, and click **OK**.

If the document is associated with an interchange, the Move option is not available.

The documents are moved or copied to the selected folder.

### Viewing a Summary of Folder Contents

TrustedLink Windows and Remote User Interface users can display a summary of the number of each document type in a folder.

#### To display the summary

Right-click the folder and select **Properties**.

The summary is displayed in a new window.

#### To print the summary

Click **Print Report**.

### Emptying a Folder

If you empty the Trash folder, its contents are immediately and permanently deleted.

**Note:** Remote User Interface users cannot empty a folder.

#### To remove a folder's contents without removing the folder

Right-click the folder and select **Empty Folder**.

The contents are either sent to the Trash or removed permanently, depending on your Trash settings. See "Setting Trash Options" on page 197.

## Interchanges

An *interchange* is the entire collection of documents and envelope information that makes up a transmitted e-Commerce file.

Ordinarily you view, print, or create individual documents in TrustedLink Windows. When you send, copy, move, delete, or archive, you act upon interchanges instead of documents.

Removing individual documents from an interchange renders the interchange invalid. TrustedLink Windows protects interchange integrity with the following rules:

- You must archive whole interchanges.
- You cannot move an individual document from any folder, unless the document is not associated with an interchange.
- You cannot delete an individual document from the Out or Sent folders, or their subfolders, unless the document is not part of an interchange.

### Viewing Interchanges

All sent or received documents belong to an interchange. Only the documents, not the interchange, are shown in the document list on the Operations window.



#### To view the interchanges associated with your documents

- 1 If the Properties Sheet on the Operations window is not visible, click **Properties Sheet** to display it.
- 2 Select the In or Out folder (or one of its subfolders).
- 3 Click the Interchanges tab on the Properties Sheet.  
All interchanges in the selected folder are listed on the tab. Interchanges are identified by a trading partner name (which can be different from the name shown in the document list), and the date and time of transmission.
- 4 To view the contents of an interchange, right-click it and select **View Contents**.  
The interchange contents are shown in a new window.

#### Finding the Interchange for a Document

##### To find the interchange associated with a particular document

- 1 Select a document in the list on the Operations window.
- 2 Click the Hierarchy tab.  
The entire interchange in which the document was transmitted is shown on the tab. The selected document is highlighted.

#### Moving Interchanges

##### To move an interchange from one folder to another



- 1 If the Properties Sheet on the Operations window is not visible, click **Properties Sheet** to display it.
- 2 Select the folder containing the interchange(s).
- 3 Select the Interchanges tab.
- 4 Select the interchange(s) to move.
- 5 Right-click the selection and select **Send To**.  
The Select Destination Folder window lists all document folders.
- 6 Select the folder to which you plan to move the interchange(s) and click **OK**.  
The interchange(s) are moved to the selected folder.

#### Displaying Interchange Control Numbers for Documents

To find the interchange number for each document, you can include a column for Interchange Control Numbers in the document list in Operations.

Depending on the number of documents, displaying Interchange Control Numbers can affect TrustedLink Windows performance. If you notice a slower response time for displaying documents, clear the Interchange Control Number selection from the Preferences for EC Document View.

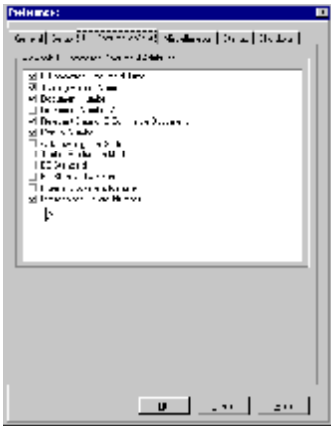
##### To display Interchange Control Numbers in the document list



- 1 In TrustedLink Windows Operations, click **Documents > Preferences**.  
The Preferences dialog box displays the General tab.

- 2 Click the EC Document View tab.

Select an item to display the data in the document list columns in the TrustedLink Windows Operations window.



- 3 Select Interchange Control Number and click **OK**.
- 4 Close TrustedLink Windows.

Your changes are applied the next time you start TrustedLink Windows. The document list in the TrustedLink Windows Operations window includes the Interchange Control Number column.

## Deleting Interchanges and Documents

TrustedLink Windows users cannot delete an individual document from the Out or Sent folders, or any of their subfolders, unless the document is not associated with an interchange. If individual documents are deleted, the connection with the interchange is lost, and the interchange then cannot be reconstructed or retransmitted.

**Note:** Remote User Interface users cannot delete interchanges and documents.

### Setting Trash Options

When you delete interchanges or documents, you can either remove them permanently or send them to the Trash. Items in the Trash folder can be restored. The Trash can be emptied on a regular schedule, or only on command.

#### To set Trash options

- 1 On the Operations window, click **Documents > Preferences**.  
The Preferences window opens.
- 2 Click the Miscellaneous tab. The following options are available:

To do this:	Set this option...
Automatically remove items from Trash	Select the <b>Auto Delete Trash After</b> box and specify the number of days to hold items.  Items in the Trash that were deleted more than the specified number of days ago are removed.  Trash is emptied when you exit TrustedLink Windows.

To do this:	Set this option...
Never send items to the Trash	Select the <b>Do not move E-Commerce documents to the Trash Folder...</b> box. Deleted items are permanently removed.
Send deleted items to the Trash	Clear the <b>Do not move E-Commerce documents to the Trash Folder...</b> box.

### Deleting Interchanges

Remote User Interface users cannot delete interchanges.

#### To delete an interchange

- 1 Select the folder on the Operations window that contains the documents.
- 2 In the Properties Sheet, click the Interchanges tab.  
All interchanges in the selected folder are listed on the tab.
- 3 Right-click the interchange and select **Delete**.  
The interchange, including all documents, is removed.

### Deleting Documents

You cannot delete an individual document from the Out or Sent folders, or any of their subfolders, unless the document is not associated with an interchange. Delete interchanges rather than individual documents.

**Note:** Remote User Interface users cannot delete documents.

Incomplete documents and text documents are not associated with interchanges. You can delete the former individually and the latter either individually or by script, as described in "Delete Documents" on page 179.

#### To delete individual documents from the list on the Operations window

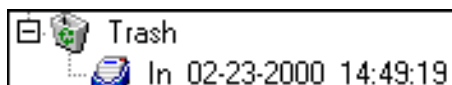
Right-click the document and select **Delete**.

### Viewing Items in the Trash

Items are deleted to the Trash as subfolders, labeled with the source folder and the date and time deleted. Each subfolder contains all documents or interchanges that were deleted at the same time.

#### EXAMPLE

If you delete 10 interchanges, a single subfolder is created.



#### To view deleted items

Select a subfolder in the Trash folder.

All documents in the subfolder are shown in the document list.

### Restoring Items from the Trash

As long as items remain in Trash, you can restore them to their original folder.

**Note:** Remote User Interface users cannot restore items from the Trash.

**To restore items from the Trash folder**

Select a subfolder and do one of the following:

To restore...	Do this:
All contents of a Trash subfolder	Right-click the subfolder and select <b>Restore Folder From Trash</b> .
Individual documents in a Trash subfolder	<ol style="list-style-type: none"><li>1 Select one or more documents in the document list.</li><li>2 Right-click and select <b>Restore From Trash</b>.</li></ol>

Restored items are returned to their original folders.

**Backing Up the TrustedLink Windows Database**

**Important:** Inovis recommends you back up your database on a regular basis. If you do not backup your database, you might lose all document, overlay, and log-on information.

Every five days a message asks you to back up the database when you close TrustedLink Windows. If you click **Yes**, backups of these \Inovis\TrustedLink windows folders are saved in a C:\TLWBackup default directory:

- **Document**—Contains the TrustedLink Windows databases and all documents in the document folders shown in the TrustedLink Windows Operations window.
- **Table**—Contains trading partner definitions, Forms Overlays, Dictionaries, Part Cross-Reference tables, and Name and Address tables.
- **Work**—Contains Log-ons and XML documents.
- **Maps and Custom Forms** are not backed up.

**Note:** Remote User Interface users cannot back up the TrustedLink Windows database.

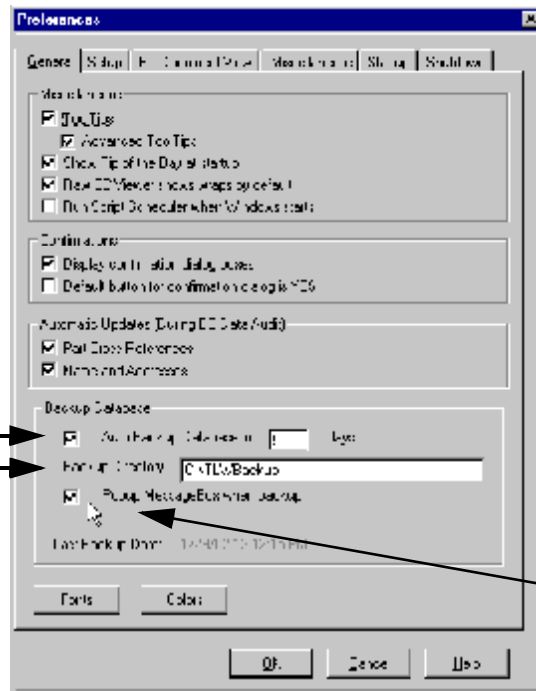


## To change the default settings for backing up the database

- 1 In TrustedLink Windows Operations, click the **Documents** menu and select **Preferences**.

Either clear the check box to disable Auto Backup, or change the number of days.

Change the directory.



- If Auto Backup is *not* selected, this message is disabled.
- If Auto Backup is selected but the Popup check box is cleared, TrustedLink Windows backs up the database without asking for confirmation.

- 2 Change any Backup Database default settings and click **OK**.

## Backing Up Other Data

Use the **Extract** function, not Archive, to back up trading partner definitions, Log-ons, or Forms Overlays. See “Extracting TrustedLink Windows Information” on page 231.

**Note:** Remote User Interface users cannot back up other data.

## Archiving and Restoring Documents

The process of removing documents from TrustedLink Windows and saving them in an external file is called archiving. Archived documents can be restored to TrustedLink Windows later if necessary.

**Note:** Remote User Interface users cannot archive and restore documents.

You must archive whole interchanges. Archiving individual documents is not possible. Incomplete documents and text documents are not associated with interchanges, and cannot be archived.

**Important:** Do not attempt to archive a large amount of data to a disk. If the archive file is too big to fit on the disk, an unrecoverable error occurs, and you are required to restart TrustedLink Windows.

To avoid this situation, either archive to a higher-capacity drive (such as a hard disk or high-capacity removable disk), or archive in small quantities. If you are not sure how large the



archive file are, try a test archive with typical interchanges on a hard drive, and check the file size.

### Making an Archiving Plan

It is suggested you make a plan for archiving regularly and decide the following:

- How to sort the documents within interchanges, such as sorting items by date sent or received, or by trading partner
- How often to archive
- How many archives to store in each file

#### EXAMPLE

You can archive at the end of each week, adding each archive to the file until the end of the month, then start a new file for the next month.

**Note:** Remote User Interface users cannot archive and restore documents.

### Setting Archiving Options

You can set two options to control archiving operations:

- **Default Archive File**—Specify an archive file name and location. TrustedLink Windows uses this file rather than prompting you for an archive file each time you archive.
- **Automatically Append Archive**—Append (add) to an existing archive file each time you archive. Otherwise you are prompted to either append or overwrite it.

**Note:** Remote User Interface users cannot set archive options.

#### To set archiving options

- 1 On the Operations window, click **Documents > Preferences**.

The Preferences window opens.

- 2 Click the Setup tab.

- 3 To specify a default archive file, either type the full path and name, or click the ellipsis button (...) and select an existing file. The extension for archive files is .mdb.

- 4 To append (add) to an existing file, select the Automatically Append Archive check box.

If this option is selected, an existing archive file is appended each time you archive, regardless of whether or not you specify a default archive.

### Archiving Documents

**Note:** Remote User Interface users cannot archive documents.

#### To archive documents

- 1 Select the folder on the Operations window that contains the documents to archive.

- 2 In the Properties Sheet, click the Interchanges tab.

All interchanges in the selected folder are listed on the tab.

- 3 Select one or more interchanges. Right-click the selection and select **Archive**. One of the following occurs:

- If no default archive is specified in Preferences, a Locate Archive window opens. Either select an existing archive or type a new name. The extension for archive files is .mdb.

- If a default archive is specified in Preferences, the data is archived to the specified file.

### Viewing and Restoring Archives

**Note:** Remote User Interface users cannot view and restore archives.

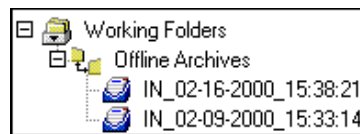
#### To view the contents of an archive file or restore documents to active use

- 1 On the Operations window, click **Offline Archives** under **Working Folders**.

A Locate Archive dialog box opens.

- 2 Select an archive file.

The contents of the selected archive are listed as subfolders of Offline Archives, labeled with the source folder and the date and time archived.



Each subfolder contains all interchanges archived at one time; that is, if you selected 10 interchanges for archiving, a single subfolder was created.

- 3 To view archived documents, select a subfolder.

All documents in the selected subfolder are shown in the document list. The interchanges are listed on the Interchanges tab.

- 4 To restore items from the archive, click the Interchanges tab. Select one or more interchanges. Right-click and click **Restore**.

The selected interchanges are restored to the folder from which they were originally archived.

## Exporting and Importing EDI Files

With TrustedLink Windows you can export and import raw EDI and save it to a new file. By exporting raw EDI, you save the file in different locations for use with another application. You can print and view the raw EDI using these files.

**Note:** Remote User Interface users cannot export and import EDI files.

When you export EDI files, your interchanges are converted and saved in raw EDI format. When you import raw EDI from files in your database, the documents are converted to valid raw EDI format in TrustedLink Windows.

### Exporting EDI Files

#### To export raw EDI files from the Operations window

- 1 Select any folder containing interchanges.
- 2 Click the Interchanges tab and select the interchanges to export to EDI.
- 3 Right-click any of the highlighted interchanges, point to **Custom > Export EDI**.  
The Export EDI dialog box opens.
- 4 Type the new path and file name for the exported file, or use the default path.

- 5 Click **OK**.

The interchanges are saved in raw EDI format to the location specified.

### **Importing EDI Files**

To import an EDI file to TrustedLink Windows, you must have a definition for the trading partner.

#### **To import an EDI file from the Operations window**

- 1 Click **Go > Custom > Import EDI from File**.

The Import EDI dialog box opens.

- 2 Type the location of the raw EDI file and click **OK**.

The document is imported to the Out folder.



**T**his chapter covers specialized data management procedures that are optional or required for only a small percentage of users.

**Note:** This information applies to TrustedLink Windows, not the optional Remote User Interface.

- “Part Cross-Reference Table” on page 205
- “Names and Addresses Table” on page 208
- “Audit Criteria” on page 210
- “Maintaining Accums” on page 213
- “Managing Document Numbers” on page 218
- “Managing Acknowledgments” on page 220
- “Auditing and Bundling Data” on page 223

## Part Cross-Reference Table

Part number data from incoming e-Commerce documents is saved in the Part Cross-Reference (PXR) table. This table is used in two ways:

- Data Entry and printing—Data Entry and Print Overlays are often designed to automatically look up information in the table and place the data on the printout or in the outgoing document. For example: an incoming purchase order might contain only your customer’s part number. The Print Overlay matches that number to your part number and description, and includes them on the printout.
- Reference—You can use the table as a reference to look up part numbers and other part-related information.

Information about any billable item, including services or parts, can be stored in the PXR table.

- “Information in the Part Cross-Reference Table” on page 206
- “How the Part Cross-Reference Table is Generated” on page 206
- “When to Edit the Part Cross-Reference Table” on page 206
- “How the Names and Addresses Table is Generated” on page 208
- “Editing the Part Cross-Reference Table” on page 207

### Information in the Part Cross-Reference Table

For any given trading partner or document type, the Part Cross-Reference fields are populated if the document data contains the appropriate information; otherwise the fields are blank.

The following items can be stored in the Part Cross-Reference table:

- Company code for the trading partner associated with this part number
- Our part number, the part number your company uses
- Their part number, the part number the trading partner uses
- Description of the part
- Purchase order number and line number associated with the part
- Unit price
- Unit of measure that corresponds to the unit price
- Engineering Change Level
- Additional part number, such as a UPC code

### How the Part Cross-Reference Table is Generated

Each time you receive an e-Commerce document, TrustedLink Windows scans it for part information and stores any new information found. The specific segments and elements scanned are determined by the Audit Criteria.

See “Audit Criteria” on page 210 for more information about how this process works and how you can add to or change it.

**Important:** Do not turn off the PXR automatic update feature unless you are certain Data Entry or Print Overlays, maps, or flat file requirements do not use PXR information. If they do not, you can speed up the process of receiving documents by turning off the PXR automatic update feature. For instructions, see the General tab in “Setting Preferences” on page 109.

### When to Edit the Part Cross-Reference Table

Manually editing the Part Cross-Reference (PXR) table is optional. Possible reasons for editing it include:

- Deleting incorrect part numbers sent in error by your trading partner.
- Deleting obsolete part numbers.
- Changing UNKNOWN part numbers to actual part numbers. If a part number is not in the document data, TrustedLink Windows automatically fills it in with a value

Example: UNKNOWN-C3460049E0487161

You can fill in the actual part number so it is shown on printouts.

- Building lists of valid values for use in data entry. You can increase data entry speed and accuracy by giving your data entry operator a list of values to choose from in a field that is linked to the PXR table.

You can also add items to valid value lists during data entry and store them in the PXR table; they do not necessarily need to be added in advance.

See “Automatically Filled Fields” on page 146 and the diagram in “How Audit Criteria Are Used” on page 211 for more information.

**Important:** Do not change the Company Code in Edit Part Cross-Reference. Change Company Codes only in the Trading Partner Control Panel for the trading partner. Existing PXR entries are then updated to reflect the new code. It must match the Company Code in the trading partner definition in order for the PXR table and linked Data Entry or Print Overlays to be updated correctly.

### Editing the Part Cross-Reference Table

Do not change the Company Code when editing a Part Cross-Reference (PXR). Change Company Codes only in the Trading Partner Control Panel for the trading partner. Existing PXR entries are then updated to reflect the new code. See “Editing a Trading Partner” on page 55.

### To add or edit PXR information



- In TrustedLink Windows Administration, click **Part Cross-Reference**.

Entries are listed alphabetically by Company Code.

Company Code	Their Part Number	Our Part Number	
QEWCa	50066	UNKNOWN-C346D049C1A2716	Close Edit... Add... Delete Help
QEWCu	57155	UNKNOWN-C346D049DFB3716	
QEWCu	74368	UNKNOWN-C346D049DFB4716	
QEWCu	79000	UNKNOWN-C346D049DFB4716	
QEWCu	79001	UNKNOWN-C346D049DFB4716	
QURPLC	05410-809144-116	300011004	
QURPLC	36146	90992	
QURPLC	36147	UNKNOWN-C346D049E069716	
QURPLC	36148	UNKNOWN-C346D049E069716	
QURPLC	36149	UNKNOWN-C346D049E07A716	
Show All			

### 2 Do one of the following:

- To view or edit existing part information, double-click a part.
- To add a new entry, click **Add**.

The Edit (or Add) Part Cross-Reference window opens.

Company Code: <b>QURPLC</b>				OK
Their Part Number: <b>36146</b>				Cancel
Our Part Number: <b>80914</b>				Help
Description:   Truck - Auxiliary				
PU Number: 220497	PU Line Number: 	Unit Price: 425	UOM: EA	
Engineering Change: 		Additional Part Number: UN1222300554		

The first three fields (yellow fields) are mandatory. The two Description lines are limited to 50 characters each.

## Names and Addresses Table

Trading partner name and address information in incoming documents is automatically saved in the Names and Addresses table. This table is used in two ways:

- Data Entry and printing—Data Entry and Print Overlays you purchase from Inovis are often designed to automatically look up information from the table and place it on the printout or in the outgoing document.

Example: A Data Entry Overlay can automatically fill in the correct ship-to address when you select a ship-to code from a dropdown.

- Reference—You can use the table as a reference to look up address and contact information for your trading partners.

A trading partner can have as many Names and Addresses entries as needed. For example, a single company might have a buyer, a bill-to, and multiple ship-to addresses.

- “How the Names and Addresses Table is Generated” on page 208
- “Editing the Names and Addresses Table” on page 208

### How the Names and Addresses Table is Generated

Each time you receive an e-Commerce document, TrustedLink Windows scans it for address information and stores any new or updated information in the table. Information in N1 loop segments in X12 documents and NAD segments in EDIFACT documents is stored in the Names and Addresses table.

**Important:** Do not turn off the automatic update for names and addresses unless you are certain Data Entry or Print Overlays, maps, or flat files do not access the table. If they do not, you can speed up the process of receiving documents by turning off the automatic update for names and addresses. See the General tab in “Setting Preferences” on page 109.

### Editing the Names and Addresses Table

Editing the Names and Addresses table is optional. Possible reasons for editing it include:

- Deleting incorrect addresses sent in error by your trading partner.
- Deleting obsolete addresses.
- Building lists of valid values for use in data entry. You can increase data entry speed and accuracy by giving your data entry operator a list of values to choose from in a field that is linked to the Names and Addresses.

You can also add items to the Names and Addresses table during data entry. See “Automatically Filled Fields” on page 146 for more information.

### To add or change name and address information in the table



- In TrustedLink Windows Administration, click **Names and Addresses**.



Entries are listed alphabetically by trading partner name.

Trading Partner	Type	Qualifier	Code
Dearborn Wg.	SF	92	A5550
Dearborn Wg.	SF	92	A5550 / US
Dearborn Wg.	SU	92	
Dearborn Wg.	BY	92	8396
Dearborn Wg.	ST	92	3002
Complace Bullets Inc.	ST	9	0003947266272
Maynard, Inc.	BY	92	8471
Maynard, Inc.	BY	92	8745
Maynard, Inc.	BY	92	8980
Maynard, Inc.	ST	92	8745

Buttons: [Close] [Edit...] [Add...] [Delete] [Help]

[Show All]

- 2** Do one of the following:
- To add a new entry, click **Add**.
  - To view or edit an existing entry, double-click it.

Наша ита! Ати! Косеки:

**File Name and Attributes**

<b>Trading Partner</b>	<b>Type</b>	<b>Code</b>	<b>Barcode</b>	<b>OK</b>
Murphy's Outlets Inc.	OT	0	0003047260272	<b>Cancel</b>
<b>Name and Address</b>				<b>Help</b>
OUTPLACE				
1400 S STEVENS BLVD				
<b>City</b>	<b>State/Province</b>	<b>Postal Code</b>	<b>Country</b>	<b>Dock Code</b>
ANN ARBOR	MI	48100		
<b>Contact Name:</b>	<b>Contact Phone:</b>	<b>Internal Code:</b>		
J DAVIS	(313) 555-7100			

- 3** If you are adding an entry, select a trading partner from the dropdown.
- 4** Fill in the fields as indicated in the following table. The Type, Code Qualifier, and Code fields are mandatory; all other fields are optional:

Field	Entry	X12 Source	EDIFACT Source
Type (required)	The type of address; for example, ST = ship-to address	NI01	NAD01
Code Qualifier (required)	The source of the value in the Code field. Example: 1 indicates a DUNS number; 92 indicates a value assigned by the buyer	NI03	NAD02:02
Code (required)	Code identifying a trading partner	NI04	NAD02:03
Address line 1	Trading partner name for this address	NI02	NAD03:01 to NAD03:05 or NAD04:01 to NAD04:05

Field	Entry	X12 Source	EDIFACT Source
Address lines 2 to 4	Address	N2 and N3	NAD03:01 to NAD03:05 or NAD05:01 to NAD05:03
City	City	N401	NAD06
State/ Province	State or province	N402	NAD07
Postal Code	Postal code or Zip code	N403	NAD08
Country	Country code	N404	NAD09
Dock Code	Dock code This value is not updated automatically. You can type a value for reference.	Not Applicable	Not Applicable
Contact Name	Name of contact person	PER02	CTA02:01 or CTA02:02
Contact Phone	Contact phone number	PER04	COM01:01 (if COM01:02 contains the value TE)
Internal Code	Code used by your company only This value is not updated automatically. You can type a value for reference.	Not Applicable	Not Applicable

## Audit Criteria

The Audit Criteria function updates the Part Cross-Reference (PXR) table. When you receive an e-Commerce document, TrustedLink Windows scans it for part information and stores any new information found. The Audit Criteria specify which segments, and which elements within those segments, are used to update fields in the PXR table.

The Audit Criteria also update the document numbers on all incoming documents. See “Managing Numbers for Incoming Documents” on page 219 for information on document numbers.

TrustedLink Windows includes default Audit Criteria for many commonly-used e-Commerce document types. You only need to change the criteria in circumstances such as the following:

- You receive part information in a type of document for which no Audit Criteria have been set, and you wish to store the information in the PXR table. You can add instructions to the Audit Criteria to find the part information in these incoming documents.
- The part information in your incoming documents is located in a field that is not currently searched. You can add segments and elements to the list of those TrustedLink Windows searches.
- Values you do not want are being stored.

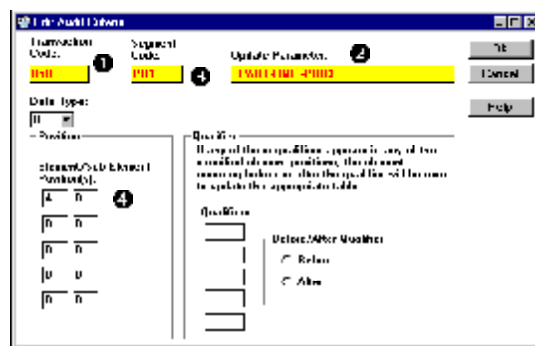
Example: You can choose to store a part number if its qualifier is VN, indicating a vendor’s part number, but not if the qualifier is UP, indicating a UPC code.

Although the actual data stored is specific to the trading partner that sent it, the Audit Criteria apply to all incoming documents of a given type (for example, all EDIFACT purchase orders). You cannot change Audit Criteria for a single trading partner only.

### How Audit Criteria Are Used

The following illustration shows how the Audit Criteria, e-Commerce data, PXR table, and Data Entry Overlay work together. In this example:

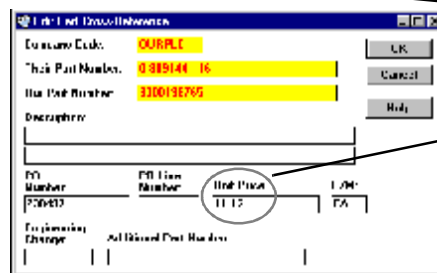
- TrustedLink Windows scans a purchase order
- Locates the unit price for a part
- Stores it in the PXR table
- Places it in the appropriate field on a Data Entry Overlay



Audit Criteria specify:

- 1 For 850 (X12 purchase order),
- 2 find unit price
- 3 in PO1 segment
- 4 element position 4

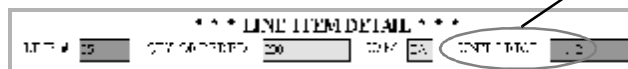
POT~1~204~EA~11.12~TE~CB~0-809144-



Document contains "11.12" in the specified position.

The unit price is stored in the PXR table for this part.

The Data Entry Overlay automatically pulls the correct unit price for the part.



### Editing or Adding Audit Criteria

#### To edit or add Audit Criteria

- In TrustedLink Windows Administration, click **Edit > Audit Criteria**.

The Audit Criteria window opens.



2 Click the Transaction Code column heading and type the document type code (such as 850 or DELFOR) in the Search box.

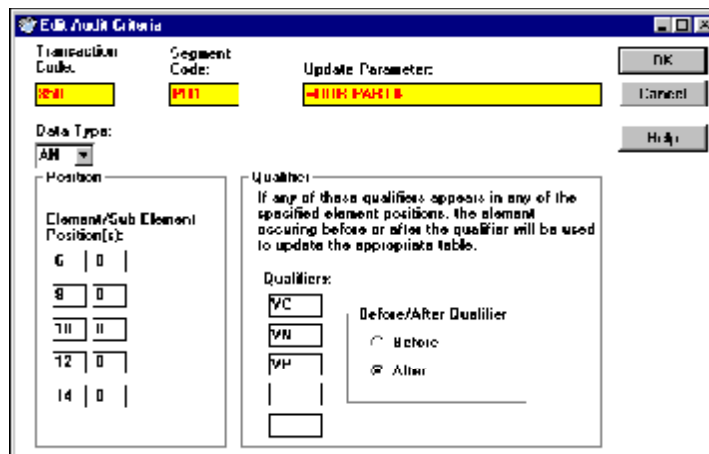
3 Click **OK**.

Existing Audit Criteria entries for the specified document type are listed.

4 Do one of the following:

- To add a new entry, click **Add**.
- To edit an existing entry, select it and click **Edit**.

The Edit (or Add) Audit Criteria window opens.



5 If you are adding a new entry, type or select the following information. The first three fields are mandatory:

Field	Description
Transaction Code (required)	The document type code.
Segment Code (required)	The segment ID of the segment to search (such as POI).

Field	Description
Update Parameter (required)	The expression corresponding to the PXR field to update. Type one of the following: =OUR-PART# (Our Part Number) =THEIR-PART# (Their Part Number) =PART-DESCRIPTION (Description) =PART-PO# (PO Number) =PART-PO-LINE# (PO Line Number) =PART-UNIT-PRICE (Unit Price) =PART-UOM (U/M) =PART-ENG-CHG (Engineering Change Level) =PART#-EXTRA (Additional Part Number)
Data Type	Select from the dropdown. Default: alphanumeric (AN)

- 6 Under Element/Sub Element Position(s) are five pairs of boxes. In the boxes on the left, type the element to search. In the boxes on the right, type the corresponding sub-element if applicable.
- You can enter up to five elements. TrustedLink Windows searches the locations in turn until it finds a usable value.
- 7 To limit the search to only values with specified qualifiers, type the specified qualifiers in order. Select either Before or After to indicate whether to store the value before or after the qualifier in the PXR table.

## Maintaining Accums

Accums are a means to automatically store, update, and display cumulative year-to-date release and shipment information. Accums are used to track items ordered by releases against blanket purchase orders. If none of your trading partners require you to track this information, you are not likely to use this functionality.

Accums provide a way to verify contractual minimum quantities have been ordered, reconcile the Original Equipment Manufacturer (OEM) order records with the your ship records, and easily determine the amount overshipped when standard packs are used.

- “Accums Requirements” on page 213
- “When to Edit Accums Data” on page 214
- “Identifying Discrepancies” on page 214
- “Editing or Viewing Accums” on page 214
- “Editing or Viewing Release History” on page 216
- “Editing or Viewing Shipment History” on page 217

### Accums Requirements

To use the Accums function, you must have a Forms Overlay or Custom Form that is specifically designed to support Accums. Forms Overlays or Custom Forms are available from Inovis.

Accums setup information is provided in the documentation that accompanies an Accums-compatible Custom Form.

### When to Edit Accums Data

Usually, Accums are updated and reported automatically. The most common reasons for editing them include:

- Correcting for a rejected shipment
- Restarting the Accum record at zero for the start of a new model year
- Deleting obsolete records, such as for a part that is no longer being ordered

### Identifying Discrepancies

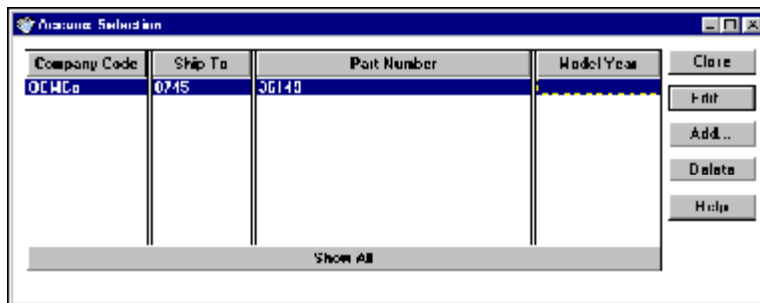
Some Custom Forms are designed to report shipment or order discrepancies on a separate line. In other cases, compare the Quantity Ordered and Quantity Shipped in the Selected Accum window for that part number to check for discrepancies between the quantity ordered and quantity shipped.

### Editing or Viewing Accums

#### To view or edit an Accum record

- 1 Start TrustedLink Windows Administration.
- 2 Click **Edit > Accums**.

The Accums Selection window opens. Accums records are listed alphabetically by Company Code, Ship-to code, and Part Number.



- 3 If you are not sure which trading partner this company code represents, check the Trading Partner Control Panel for each of the possible trading partners. The company code is shown at the top of the Trading Partner Control Panel window.
- 4 Select the record and click **Edit**.

The Selected Accum window opens.

- 5 The following table describes the fields in an Accum record. These fields can be edited if necessary:

Field	Description
Company Code	The company code for this trading partner. Important: Do not change the Company Code. It must match the Company Code in the trading partner definition in order for Accums to function correctly. Change the code in the Trading Partner Control Panel for the trading partner to automatically change it for the Accum record.
Ship To	The ship-to location for this Accum record. Usually taken from the N104 element in the e-Commerce data for the associated transaction. If adding a record manually, use the value in the Code column of the trading partner's ship-to Name and Address record.
Part Number	The part number specified in the release.
Cum Type	Select either Prior or Current. The default is Current.
Release Date	The date on which the shipment of this part was released. This date is determined from incoming data.
Transit Days	The time, in days, from the day a part is shipped until it arrives.
Quantity Shipped	The year-to-date accumulated quantity of this part that has been shipped so far. This value is based on data entered into a Data Entry Overlay. It is updated when the document is actually sent to the trading partner.
Quantity Ordered	The year-to-date accumulated quantity of this part that has been ordered so far. This value is taken from incoming data. It is updated at the time the document is viewed or printed.
Quantity Received	The year-to-date accumulated quantity of this part that has been received so far. This value is taken from incoming data. It is updated at the time the document is viewed or printed.
Raw Materials	Quantity—The amount of raw material that your trading partner has indicated they will pay for, regardless of whether the original order is completely filled. Date—The date this quantity was authorized, in YYYYMMDD format.

Field	Description
Labor	Quantity—The amount of labor cost that your trading partner has indicated they will pay for, regardless of whether the original order is completely filled. Date—The date this quantity was authorized, in YYYYMMDD format.
Fab	Quantity—The amount of fabrication cost that your trading partner has indicated they will pay for, regardless of whether the original order is completely filled. Date—The date this quantity was authorized, in YYYYMMDD format.

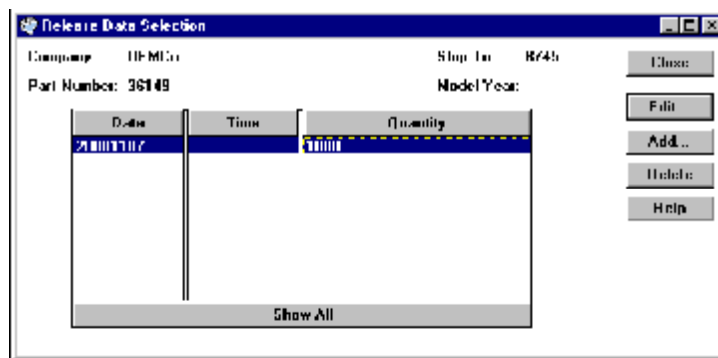
- 6 To edit or view release or shipment data, click one of the following buttons:
- **Release Data**—See “Editing or Viewing Release History” on page 216.
  - **Shipment Data**—See “Editing or Viewing Shipment History” on page 217.

### Editing or Viewing Release History

#### To view or edit the release history for an Accum record

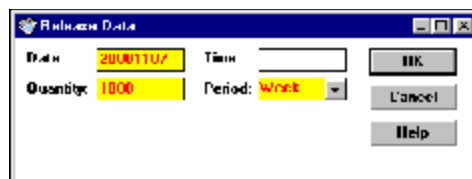
- 1 In the Selected Accum window, click **Release Data**.

The Release Data Selection window lists releases by date.



- 2 To edit a release, select it and click **Edit**.

The Release Data window opens.



- 3 You can edit the following Release Data fields:

Field	Description
Date	The starting date for this release period, in YYYYMMDD format.
Time	The starting time for this release period, in HHMM format.



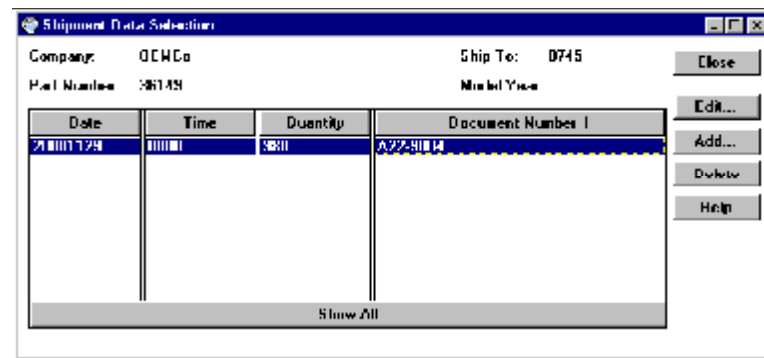
Field	Description
Quantity	The quantity ordered in this release.
Period	The length of time, beginning at a specified date and time, during which the specified quantity will be shipped. Select a value from the dropdown: <ul style="list-style-type: none"> <li>■ Day</li> <li>■ Week</li> <li>■ Month</li> <li>■ Flexible</li> </ul>

### Editing or Viewing Shipment History

#### To view or edit the shipment history for this Accum record

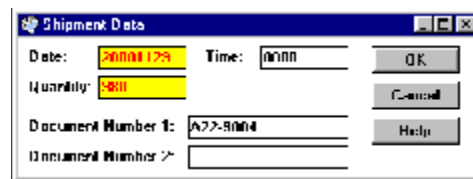
- In the Selected Accum window, click **Shipment Data**.

The Shipment Data Selection window opens. The 10 most recent shipments are listed by date. (Only the last 10 shipments are stored.)



- To edit a shipment, select it and click **Edit**.

The Shipment Data window opens.



- The following table describes the Shipment Data fields:

Field	Description
Date	The date of the outgoing document.
Time	The time of the outgoing document.
Quantity	The quantity shipped.
Document Number 1	By default, the Shipment ID on the outgoing document.
Document Number 2	

## Managing Document Numbers

One or two document numbers (labeled Document Number 1 and Document Number 2) are used to identify e-Commerce documents on the Operations window and in various TrustedLink Windows functions.

	Type ▲	Trading Partner Name	Doc Num 1	Received
Q	850	Peregrine	948795360	02/11/1999 11:54
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	850	Ourplace Outlets Inc.	08272006014	02/11/1999 11:56
Q	997	New Trading Partner	1998022617381	02/26/1999 17:38

**FIGURE 1: DOCUMENT NUMBERS**

You can control what value is used in order to make these numbers as useful to you as possible.

### EXAMPLE

In Figure 1, the element used for the document number has the same value for every document from the same trading partner named Ourplace Outlets Inc., so it might not be useful.

You can select a different source element, choosing one that has unique values.

The following general rules apply to document numbers:

- If no other value is available, the transmit date and time (YYYYMMDDHHMMSS) is placed in Document Number 1 when the document is received (incoming documents) or sent (outgoing documents).
- If the value in Document Number 1 is longer than 15 characters, and no value is specified for Document Number 2, the first 15 characters are placed in Document Number 1 and the remaining characters (up to 15 additional) in Document Number 2.

### How is the Document Number Determined?

The default source of the document number depends on how the document was created. The following table shows the source of document numbers for the different methods of document creation:

If the document came from...	The document numbers come from...
Incoming document	The document data. The specific data elements used for each document type are determined by the Audit Criteria, which can be edited in TrustedLink Windows Administration. See "Managing Numbers for Incoming Documents" on page 219 for specific instructions.
Document Turnaround	The fields designated by the alias @CumDocNum, @CumDocNum1, or @CumDocNum2 in the Document Turnaround Map. Use the Document Turnaround Editor in TrustedLink Windows Forms to assign an alias to a field in a Document Turnaround Map. If the map does not specify a document number field, the document numbers from the incoming document are used. See the <i>TrustedLink Windows Forms User Guide</i> on the Operations Help menu for more information.
Data Entry	The fields designated by the alias @CumDocNum, @CumDocNum1, or @CumDocNum2 in the Data Entry Overlay.
Flat File to EDI Translation	The document number field in the flat file header. See Appendix A "TrustedLink Windows Flat File Layout," on page 245 for information about the flat file layout.
Application File to EDI Translation	The application file field that is mapped to ST02 (truncated to nine characters).

### Managing Numbers for Incoming Documents

For each document type defined by the e-Commerce standards, the Audit Criteria designate a default segment and element as the document number source.

#### EXAMPLE

In an 850 Purchase Order (X12), the value in BEG03 is defined as the Purchase Order Number. The Audit Criteria specify for all 850s received, the value used for Document Number 1 is the value found in BEG03.

For incoming documents, you can select a different source for default document numbers by modifying the Audit Criteria.

**Important:** If you change the default source for document numbers for a document type, the change applies to all documents of that type you receive, not just those from a single trading partner.

#### To change the default document number source for incoming documents

- 1 Start TrustedLink Windows Administration.
- 2 From the Edit menu, select **Audit Criteria**.  
The Audit Criteria window opens.
- 3 Click the button at the top of the Transaction Code column, and type the code for the document to modify (for example, 850).  
The Audit Criteria entries for the selected document type are listed.

- 4 Select the row that shows **=DOCUMENT#-1** in the Update Parameter column, and click **Edit**.

The Edit Audit Criteria window opens.

- 5 To use a different segment than the one shown, type the new code in the Segment Code box.
- 6 Under Element/Sub Element Position(s) are five pairs of boxes. In the boxes on the left, type the element to search; and in the boxes on the right, type the corresponding sub-element if applicable.

You can enter up to five choices. TrustedLink Windows searches the locations in turn; that is, if the first location is blank in the document, the value in the second location is used, and so on. If all locations specified are blank, the date and time is used for the document number (YYYYMMDDHHMMSS).

- 7 To change the value for Document Number 2, repeat steps 4 through 6, but select **=DOCUMENT#-2** in step 4.

Document numbers for documents received in future communications sessions are updated as specified. Existing documents are not affected.

## Managing Acknowledgments

This section explains what acknowledgments are and how to specify acknowledgment options to comply with your trading partners' requirements.

This section also explains how to use acknowledgments to verify your trading partners received the documents you sent, and how to view and interpret reports of acknowledgment activity.

- "What is an Acknowledgment?" on page 220
- "Types of Acknowledgments" on page 221
- "Setting Acknowledgment Options for Incoming Documents" on page 221
- "Sending Acknowledgments" on page 221
- "Setting Acknowledgment Options for Outgoing Documents" on page 221
- "Tracking Acknowledgments of Outgoing Documents" on page 222
- "Acknowledgment Exceptions List" on page 222
- "Acknowledgment Reconciliation Report" on page 222

### What is an Acknowledgment?

Acknowledgments are designed to ensure data integrity. They confirm that documents were received, and indicate if a document contained an error. For example, the acknowledgment indicates if the number of segments in a document did not match the segment count in the envelope.

Acknowledgments must not be confused with other types of acknowledgment documents, such as a Purchase Order Acknowledgment (855), that acknowledge document contents. Acknowledgments only acknowledge receipt of the data.

Whether or not to send acknowledgments is a matter to be agreed upon between trading partners at the start of an e-Commerce relationship.

### Types of Acknowledgments

The ANSI ASC X12 standard has two types of acknowledgments:

- **Functional Acknowledgments (997)**—Confirms receipt of a functional group. It might also include acknowledgments of individual documents. Unlike Interchange Acknowledgments, Functional Acknowledgments cannot be requested in ANSI ASC X12 documents.
- **Interchange Acknowledgments**—An Interchange Acknowledgment confirms receipt of an entire interchange. It is sent in the form of a TA1 segment. An Interchange Acknowledgment can be requested in ANSI ASC X12 documents; that is, you can specify in an outgoing interchange that a TA1 be sent in response. Interchange Acknowledgments are far less widely used than Functional Acknowledgments.

The UN/EDIFACT standard uses one type of message for all acknowledgments: CONTRL. CONTRL messages can contain interchange, group, and message acknowledgments in individual segments.

### Setting Acknowledgment Options for Incoming Documents

First, determine whether or not your trading partner expects to receive acknowledgments. You can check your agreement or contact your trading partner for this information. Then set the acknowledgment sending options in the TrustedLink Windows trading partner definition accordingly.

See the appropriate Interchange Profile, Group Profile, and Transaction or Message Definition sections of Chapter 3, “Managing Trading Partners,” for instructions on setting acknowledgment options.

By default, TrustedLink Windows automatically generates X12 Functional Acknowledgments and EDIFACT message acknowledgments, and generates Interchange Acknowledgments only if your trading partner requests them.

Acknowledgments of individual X12 transactions can only be sent if Functional Acknowledgments are sent. A transaction acknowledgment is part of a Functional Acknowledgment, so it cannot be sent alone.

### Sending Acknowledgments

Each time you receive e-Commerce documents, TrustedLink Windows creates the acknowledgments you specify in the trading partner definition, and automatically sends them in your next communication to the trading partner.

### Setting Acknowledgment Options for Outgoing Documents

You can set these acknowledgment options for your outgoing documents:

- Whether or not you expect to receive acknowledgments. This does not control whether or not you actually receive them (that is up to your trading partners), but only how TrustedLink Windows reports them to you.
- The number of days to wait for an acknowledgment before marking the item as expired in the report.

The acknowledgment defaults for outgoing documents are:

Document Type	Acknowledgment Default
X12 Functional Group	Expect to Receive
X12 Interchange	Do Not Expect to Receive

Document Type	Acknowledgment Default
EDIFACT Group	Not applicable
EDIFACT Interchange	Do Not Expect to Receive

To change any of these options for a particular trading partner, select an option on the Interchange Profile or Group Profile for that trading partner. See Chapter 3, “Managing Trading Partners,” for instructions.

### Tracking Acknowledgments of Outgoing Documents

For each document you send, TrustedLink Windows reports whether or not an acknowledgment is received from your trading partner in two ways:

- **Acknowledgment Exceptions list**—A list of items in your **Sent** folder for which you have not yet received acknowledgments, or for which you have received acknowledgments you did not expect.
- **Acknowledgment Reconciliation Report**—A full report of acknowledgment activity on all your outgoing documents that are expecting acknowledgments, and any documents for which unexpected acknowledgments were received. Documents are included in the report regardless of whether they have been deleted, archived, or moved.

### Acknowledgment Exceptions List

The Acknowledgment Exceptions list is a quick way to identify documents awaiting acknowledgments.

#### To view the Acknowledgment Exceptions list

- 1 On the Operations window, right-click the **Sent** folder and select **SENT Properties**.

The Folder Properties window shows a summary of the documents in your **Sent** folder.

- 2 Select the View Acknowledgment Exceptions check box.

Individual document details are listed for the following documents in the **Sent** folder only:

- Documents for which you expect to receive an acknowledgment but have not yet received one.
- Documents for which you did not expect to receive an acknowledgment, but did receive one.
- Documents for which the acknowledgment period has expired.

- 3 To print this list, click **Print Report**.

### Acknowledgment Reconciliation Report

The Acknowledgment Reconciliation Report retains the acknowledgment information about a particular document for a default period of 30 days. Documents sent more than 30 days ago are listed as “Acknowledgment Period Expired” on the report.

The Acknowledgment Reconciliation Report includes the following information:

- Trading partner name
- Interchange control/reference number
- Functional group control/reference number

- Document type
- Document control/reference number
- Date/time sent
- Date/time acknowledged
- Acknowledgment status

### Changing the Default Time Period

#### To change default time period on Acknowledgment Reconciliation Report

- 1 On the Operations window, click **Documents > Preferences**.

The Preferences window opens.

- 2 Click the Setup tab.
- 3 Type the number of days in the **Acknowledgment Reconciliation Report keeps ...days** box.

### Viewing or Printing the Report

#### To view or print the Acknowledgment Reconciliation Report

- 1 Start TrustedLink Windows Administration.
- 2 Click **Reports > Acknowledgment Reconciliation**.

The report is displayed in the Acknowledgment Reconciliation Report window.

- 3 To print the report, click **Print**.
- 4 Close the report window.

A message asks: "Delete report data?"

- 5 Click **Yes** or **No**:
  - Information about expired items and unexpected acknowledgments is permanently removed. This is the recommended option because it keeps the report from becoming too large and helps reduce the time to display the report. Only the acknowledgment reconciliation information is deleted, not the documents themselves.
  - Items reported are retained, and are listed again the next time you view the report.

## Auditing and Bundling Data

**Auditing** is the internal process by which TrustedLink Windows reads and stores an incoming e-Commerce file. Auditing involves not only storing the documents, but also storing and updating trading partner information, part numbers, acknowledgment status, and other details.

**Bundling** is the process of building complete outgoing files from individual documents. Bundling adds appropriate envelope segments to the documents according to the trading partner definition, and queues the documents to send.

Ordinarily, both auditing and bundling take place automatically as part of routine document processing; for example, when you receive e-Commerce data during a communications

session, TrustedLink Windows performs an audit operation. You can audit and bundle data on command if necessary.

Use the Audit function to process an e-Commerce file from a disk or an external file stored on your system. (See “Auditing E-Commerce Data” on page 224.)

Use the Bundle function to create an e-Commerce file and store it outside of TrustedLink Windows (see “Bundling E-Commerce Data” on page 224).

## Auditing E-Commerce Data

### To audit an e-Commerce file into TrustedLink Windows

- 1 On the Operations window, select **Audit Raw EC** from the Utilities menu.  
The Audit Raw EC File window opens.
- 2 Type the full name and location in the EC Source box, or click the ellipses button (...) and navigate to the file.
- 3 Required: Select a Log-on from the Log-on Name dropdown.
- 4 If you do not want to store non-e-Commerce data (such as text files), clear the Save Non-EC check box.
- 5 Click **OK**.

TrustedLink Windows audits the specified file and displays the results. The new documents are shown in the document list.

## Bundling E-Commerce Data

### To bundle e-Commerce documents into outgoing files

- 1 On the Operations window, click **Utilities > Bundle EC Data**.  
The Bundle Outgoing EC Documents window opens.
- 2 Select a Log-on from the dropdown and click **OK**.

TrustedLink Windows searches the Out folder for documents associated with the selected Log-on, and bundles the documents for transmission.



# Advanced Administration

**T**his chapter covers advanced administration of TrustedLink Windows. It does not apply to the optional Remote User Interface.

- “Administration Window” on page 225
- “Searching in Administration Windows” on page 226
- “Administration Window Reference” on page 227
- “Advanced Administration” on page 228
- “Reviewing Log Files” on page 228
- “Extracting TrustedLink Windows Information” on page 231
- “Merging TrustedLink Windows Components” on page 232
- “Using the E-Commerce Dictionaries” on page 234
- “Defining User Security” on page 236
- “Setting Up Printer Preferences” on page 239
- “Rebuilding Database Tables” on page 240
- “Administering AS2 Connectivity” on page 240
- “Re-Registering TrustedLink Windows” on page 244

## Administration Window

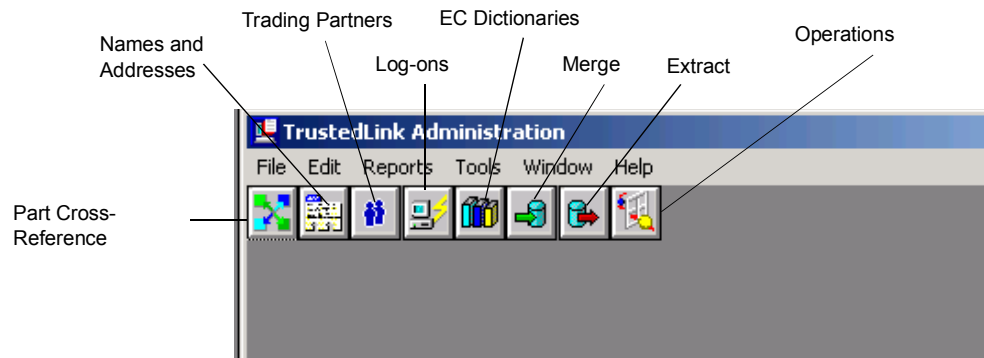
Many functions related to setting up and maintaining TrustedLink Windows and managing your data are performed from the TrustedLink Windows Administration window.

**Important:** All TrustedLink Windows administration, trading partner configuration, and file merging operations occur at the main TrustedLink Windows installation.

Start TrustedLink Windows Administration in one of the following ways:

- On the TrustedLink Windows Operations window, click **Go > Administration**.
- In Operations, press the **F2** key.
- Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.

The TrustedLink Windows Administration window opens:



## Searching in Administration Windows

Many windows in TrustedLink Windows Administration display information in a table format. To quickly locate an item or group of items in any table, you can search for a particular value in a column.

Company Code	Their Part Number	Our Part Number
UEMLu	50066	UNKNOWN-C346D049E1A2716
OCMCa	57155	UNKNOWN-C346D049DF03716
OFMFn	74968	UNKNOWN-C346D049DF84716
UEMLu	75000	UNKNOWN-C346D049DF84716
OCMCa	75001	UNKNOWN-C346D049DF03716
INTERP:	164118144 176	300111114
OURFLC	36145	30082
OURFLC	36147	UNKNOWN-C346D049E059716
OURFLC	36149	UNKNOWN-C346D049C063716
INTERP:	36149	UNKNOWN-C346D049E1A2716

Buttons: Close, Find, Add..., Delete, Help, Show All

### Searching

The preceding Part Cross-Reference window is used as an example in the following procedure,

#### To find an item

- 1 Click any column heading. For example, click the Their Part Number column heading.

The Search dialog box opens.

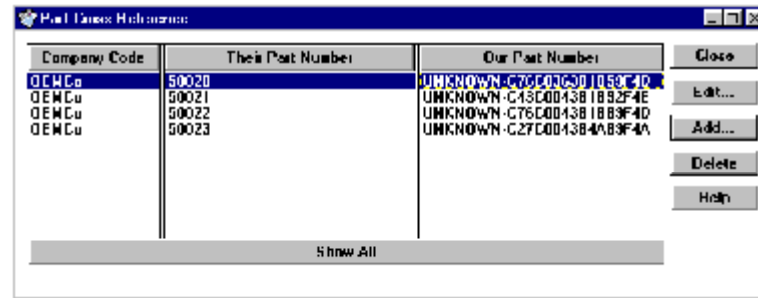


- 2 Type the text to search for in the box (such as a single part number), click **OK**.

If the text you are searching for is found in the column, the entry or entries that contain it are displayed.

- 3 To find a group of items, use the asterisk (\*) wildcard in the text box. For example, type **5002\*** to find all part numbers that begin with 5002.

All entries that match the characters you specified are displayed.



### To display the full list after a search

- 1 Click **Show All**.

Only the items currently displayed are searched, so if you do not find the item you were looking for, click **Show All** first before trying a new search.

- 2 To search on multiple criteria, perform another search without clicking Show All. For example, you can display all entries for a particular Company Code, and then search only that list for a particular part number.

## Administration Window Reference

The menus on the Administration window are listed in the following table:

Menu	Command	Function
File	Merge	Merge a TrustedLink Windows component or extracted file.
	Extract	Copy TrustedLink Windows information to an external file.
	Preferences	Set Preferences.
	Exit	Exit TrustedLink Windows Administration.
Edit	Trading Partners	View and update trading partner information.
	Log-ons	View and update Log-ons.
	Names and Addresses	View and update trading partner address and contact information.
	Part Cross-Reference	View and update part information.
	Accums	View and update Accums.
	E-Commerce Dictionaries	View e-Commerce dictionaries.
	Audit Criteria	View and modify Audit Criteria.
	AS2 Configuration	Configure server owner properties.
Reports	Communications	View and print reports on communications.
	Acknowledgment Reconciliation	View and print acknowledgment reports.

Menu	Command	Function
Tools	Rebuild Tables	Repair corrupted table indexes.
	Import AS2 Trading Partner	Import an AS2 trading profile to create a new trading partner definition.
	User Administration	Set security options and add or delete authorized users.
	Reset Security	Require password on next use.
	TrustedLink Windows Operations	Start or switch to TrustedLink Windows Operations.

## Advanced Administration

The following advanced Administration tasks are discussed in the remaining sections of this chapter:

Task	Description
Review Log Files	Review the results of TrustedLink Windows operations such as communicating, mapping, or running a script. See “Reviewing Log Files” on page 228.
Extract TrustedLink Windows Components	Back up non-e-Commerce information stored in TrustedLink Windows. See “Extracting TrustedLink Windows Information” on page 231.
Merge TrustedLink Windows Components	Install new or extracted items into TrustedLink Windows. See “Merging TrustedLink Windows Components” on page 232.
Use the E-Commerce Dictionaries	Look up e-Commerce standards information. See “Using the E-Commerce Dictionaries” on page 234.
Define User Security	Control user access to TrustedLink Windows. See “Defining User Security” on page 236.
Set up Printer Preferences	Set up your printers. See “Setting Up Printer Preferences” on page 239.
Rebuild Tables	Repair corrupted database table indexes. See “Rebuilding Database Tables” on page 240.
Administer AS2 Connectivity	Administer AS2 connectivity, including renewing and activating a BizConnect license. See “Administering AS2 Connectivity” on page 240.
Re-Register TrustedLink Windows	Re-register TrustedLink Windows before installing the optional Remote User Interface. See “Re-Registering TrustedLink Windows” on page 244.

## Reviewing Log Files

TrustedLink Windows records operation results in log files. Some of these results are displayed in Results windows at the conclusion of an operation. With the Log File Viewer, you can review and print these results later. The following operations are recorded in log files:

- Communications
- Print preview

- Print
- Flat file mapping
- Application file mapping
- Document Turnaround
- Running a script

### AS2 Error Messages in Log Files

While transmission errors in AS2 documents are listed in TrustedLink Windows log file details, you might want to access BizConnect for further information.

For error messages, verify the BizConnect setup for AS2 transports. For summary messages, view the BizConnect transactions reports.

See “Accessing BizConnect from TrustedLink Windows” on page 241 and “Resolving Failed AS2 Documents” on page 98.

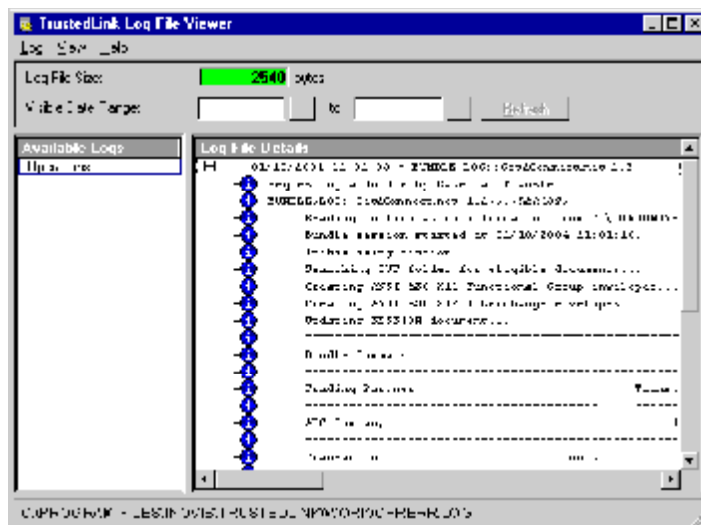
### Viewing a Log File

#### To view a log file

- 1 On the Operations window, click **View > Log Files**.

The Log File Viewer opens. All logs on your system are listed in the left pane.

If a log file is empty (that is, no events of that type have occurred or the log data has been purged), it is not listed.



- 2 Select a log in the Available Logs list.

The log is displayed under Log File Details. Each event is listed as a separate entry.



- 3 To limit the events displayed by date, enter the start and end dates of the period to view in the Visible Date Range boxes. Click the ellipsis button (...) to select dates from a calendar.

**Note:** Click **Refresh** to redisplay the entire log file.

- 4 Click the + (plus sign) next to an event to show its details.




- 5 To print the log file, select **Print** from the Log menu.

The selected log file prints. Only events in the time period currently displayed are printed. All details of each event are printed, regardless of whether or not they are currently displayed.

- 6 Close the Log File Viewer.

### Types of Results Recorded in Log Files

The Log File Viewer can log and display the following types of event results:

Result Symbol	Description
	Information: Events in which all tasks were completed.
	Warnings: Events in which some failure or problem occurred.
	Errors: Events in which no tasks were completed.

### Customizing Log Files

You can choose which types of events to view in each log file. For example, you might want to log only Error events.

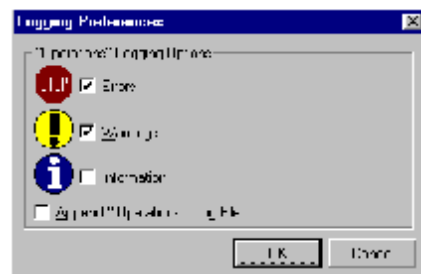
You can also choose to overwrite the log file with each event, so only the most recent event is retained.

You can set these options separately for each log file.

#### To customize a log file

- 1 In the Log File Viewer, select a log file in the left pane.
- 2 Select **Preferences** from the **Log** menu.

The Logging Preferences dialog box opens.



- 3 Select the check box beside the event types to include in the log file.
- 4 To overwrite the log file each session, clear the Append "Operations" Log File check box.  
The next time you start TrustedLink Windows and record an event, the events from the previous session are overwritten.



**5 Click OK.**

Your preferences are applied to future events. The existing log file is not affected.

- 6** To set preferences for additional log files, select another log in the Available Logs list and repeat steps 2 through 5.

### Emptying Log Files

If you choose to append the log files, event records remain in the files until you empty them. Empty your log files from time to time to prevent them from becoming too large. This is especially important if you choose to log Information events, because they can accumulate quickly.

An alert message opens when you attempt to open a log file larger than 125 KB, and a warning message opens when the file is larger than 250 KB.

#### To empty a log file

- 1** In TrustedLink Windows Operations, click **View > Log Files**.
  - 2** In the Available Logs list, select the log file to empty.
  - 3** Go to the **Log** menu and select **Purge Log File**.
- All data is removed from the selected log file.

## Extracting TrustedLink Windows Information

Extracting is the process of copying information stored in TrustedLink Windows to an external file without removing the original items from your system. Some reasons you might want to extract are:

- Backing up information as a precaution. You can use the Extract function to back up trading partner definitions, Log-ons, Forms Overlays, etc. Use the Archive function to back up documents. See “Archiving and Restoring Documents” on page 200.
- Reinstalling TrustedLink Windows. For example, if you upgrade to a new computer and plan to reinstall TrustedLink Windows, you can extract the information from your old version to use on the new system.
- Sharing information with another stand-alone system running TrustedLink Windows.

Extracted items can be restored to your system or another TrustedLink Windows system. For example, if you extracted all your trading partners, and later deleted one by accident, you can restore it from the extracted file. The restoring process is called merging. See “Merging TrustedLink Windows Components” on page 232.

### Which Items can be Extracted?

You can extract the following items to external files:

- Log-ons
- Dictionaries
- File Maps
- Trading Partners
- Forms Overlays
- Document Turnaround Maps

- Part Cross-Reference table

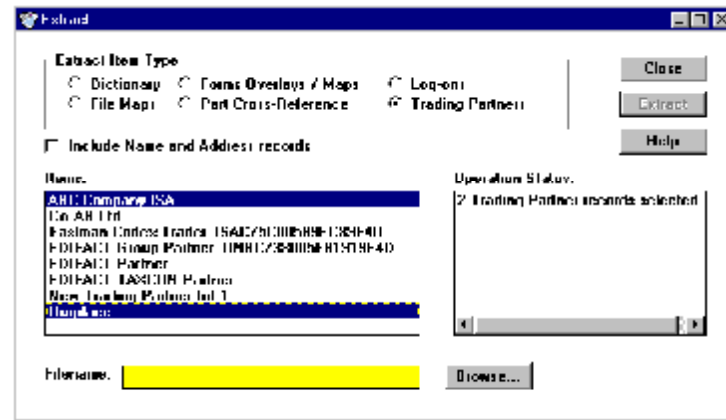
## Extracting Information



### To extract information from TrustedLink Windows

- 1 In TrustedLink Windows Administration, click **Extract**.

The Extract window opens.



- 2 Under Extract Item Type, select the type of component to extract.

All items of the selected type are listed under Items. Exception: If you selected Forms Overlays/Maps, a separate window opens.

**Important:** Inovis recommends you use a separate extract file for each item type, even though you can extract more than one type of item (for example, Log-ons and File Maps) to the same file.

- 3 Click the Items to extract. To deselect an item, click it again.

The Operation Status box shows the number and type of items selected.

- 4 Type a full path and file name for the extracted file. Use this file naming convention: file name.mrg.

- 5 To use an existing file, click **Browse** and navigate to the file.

**Important:** If you select an existing file, its contents are overwritten by the new items.

- 6 Click **Extract**.

The selected items are extracted to the specified file.

## Merging TrustedLink Windows Components

Merging is the process of installing components from external files into the TrustedLink Windows database. The following items can be merged:

- Custom Forms
- Dictionaries
- Document Turnaround Maps
- File Maps





- Forms Overlays (Data Entry and Print)
- Log-ons
- Items extracted from TrustedLink Windows as described in “Extracting TrustedLink Windows Information” on page 231.

**Important:** If you are merging extracted trading partner definitions, merge all other components first. Otherwise, associations in the trading partner definition can be lost, such as Log-on, Forms Overlay, or map assignments.

### Merging Components

After downloading forms from the Inovis Customer Portal at <https://customer.inovis.com>, you must merge the forms into TrustedLink Windows. If you received Log-ons, File Maps, or Custom Forms with your software, repeat the merge process to install those components.

### Standard File Extensions

The file extensions indicate the following components:

File Extension	Type of Component
*.mrg	Extracted merge file containing Custom Forms or multiple component files
*.scr	Log-on
*.map	File Map created with STMAP (TrustedLink Windows Mapper)
*.met	File Map created with Catalyst:Map™

### Merging Forms, Log-ons, Maps, or Custom Forms

#### To merge Forms, Log-ons, File Maps, or Custom Forms

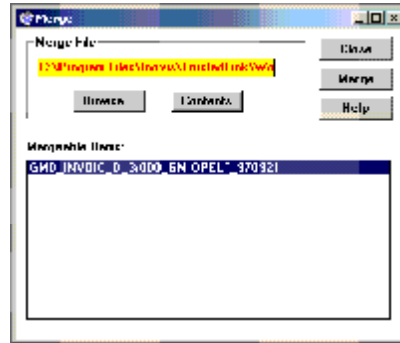
- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.

The TrustedLink Windows Administration window opens.



- 2 Click **Merge**.  
The Merge window opens.
- 3 Click **Browse** and navigate to the location of the forms you downloaded or other components you received.
- 4 Browse to the folder in which the form is saved, In the Files of type field, select **All Merge Files**.
- 5 Select the file you want, and click **Open**.
- 6 Click **Contents**.

One or more files are listed under **Mergeable Items**.



**7 Click Merge.**

The selected components are installed in TrustedLink Windows.

**8 Repeat steps 4 through 7 for each \*.mrg, \*.scr, \*.map, or \*.met file until you have merged all downloaded files into TrustedLink Windows.**

**9 Click Close to close the Merge window.**

**10 To configure the log-ons you just merged, go to “Configuring Log-ons” on page 234.**

### Configuring Log-ons

**Important:** After merging a Log-on, configure it before sending or receiving communications. Follow the separate instructions provided with each Log-on. You do not need to configure the inovisworks.net Log-on that is automatically installed with TrustedLink Windows.

If the Log-on instructions include Trading Partner Attributes, specify the attributes in the trading partner definitions.

## Using the E-Commerce Dictionaries

A dictionary is a complete version of an e-Commerce standard, including specifications for all document types, segments, and elements currently defined by the standards body. For example, the ANSI ASC X12 3050 standard and the UN/EDIFACT S.93A standard are each one dictionary. When a standard is updated, the newer version becomes another dictionary.

### Default E-Commerce Standards Dictionaries

Two dictionaries for e-Commerce standards are automatically installed with TrustedLink Windows 6.5:

- ANSI ASC X12 standards version 4050
- UN/EDIFACT standards version D99b

The dictionaries are provided for reference only. You can use dictionaries to look up information about e-Commerce documents, such as what segments a particular document type can contain.

Additional dictionaries are provided on the TrustedLink Windows CD and you can merge them into your system (see “Merging TrustedLink Windows Components” on page 232). TrustedLink Windows does not need the additional dictionaries to process your documents.

It is not necessary to install a separate dictionary for each version of the standards you or your trading partner use.

### Editing the Dictionaries

The dictionaries are provided for reference only. It is never necessary to edit them. Nor is it necessary to install a separate dictionary for each version of the standard you or your trading partner use. TrustedLink Windows does not need the additional dictionaries to process your documents.

You can add, remove, or change items in the dictionaries, or even create your own dictionary.

### Viewing a Dictionary

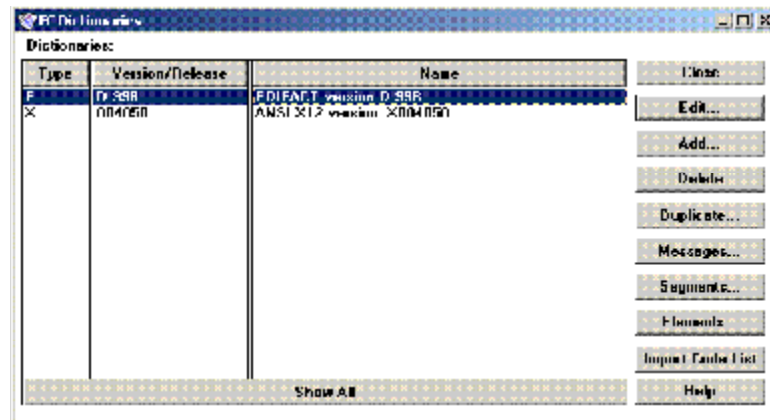
To view items in a dictionary, it is usually easiest to first select a document, then a segment within the document, then an element within the segment.



#### To view a dictionary

- 1 In TrustedLink Windows Administration, click **EC Dictionaries**.

The E-Commerce Dictionaries window lists all dictionaries on your system.



- 2 Select the dictionary to view.
- 3 Select the appropriate option from the following table, according to the type of information you are looking for:

To display the list of...	Do this:
Documents in the dictionary	Click <b>Transactions</b> or <b>Messages</b> .
Segments in the dictionary	Click <b>Segments</b> .
Elements in the dictionary	Click <b>Elements</b> .
Segments in a document	<ol style="list-style-type: none"><li>1 Click <b>Transactions</b> or <b>Messages</b>.</li><li>2 Click the ID column heading and type the document ID code in the Search box.</li><li>3 When the document is listed, click <b>Segments</b>.</li></ol> <p>The segments are displayed.</p>

To display the list of...	Do this:
Elements in a segment	<ol style="list-style-type: none"> <li>1 Display either all the segments in the dictionary or the segments in a document.</li> <li>2 Select the segment. If it is not visible, click the Code column and type the segment's ID code in the Search box.</li> <li>3 Click <b>Elements</b>.</li> </ol> <p>The elements are displayed.</p>
Valid codes (values) for an element	<ol style="list-style-type: none"> <li>1 Display either all the elements in the dictionary or all the elements in a segment.</li> <li>2 Select the element.</li> <li>3 Click <b>Codes</b>.</li> </ol> <p>Note: Only certain elements have defined codes. The Codes button is active when codes are defined for the selected element.</p>
Components for an element (EDIFACT only)	<ol style="list-style-type: none"> <li>1 Display either all the elements in the dictionary or all the elements in a segment.</li> <li>2 Select the element.</li> <li>3 Click <b>Components</b>.</li> </ol> <p>Note: The <b>Components</b> button is only active when a composite element is selected.</p>

## Defining User Security

You can restrict access to TrustedLink Windows by requiring users to enter a password when starting a TrustedLink Windows module.

User security refers to access to TrustedLink Windows itself, not security or encryption of transmitted e-Commerce documents.

### Configuring User Security

To configure user security, you must first establish an administrator. One administrator ID and password can be used. Once established, the administrator can:

- Add and delete users
- Turn on security and choose the level of security

#### To set up or change security options

- 1 In TrustedLink Windows Administration, click **Tools > User Administration**.

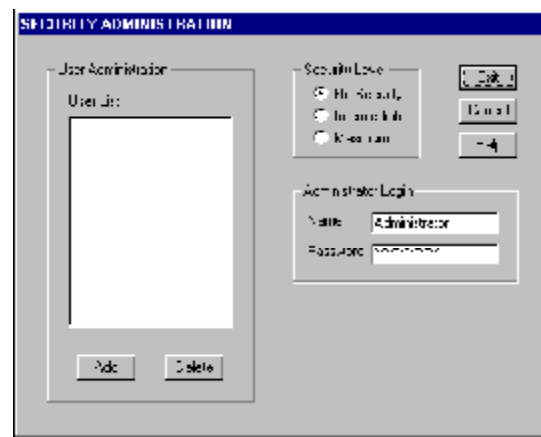
The Administrator Login opens.



- 2 The first time you use this function, both the Administrator Name and Password default to **Administrator**. Type **Administrator** in both boxes and click **OK**.

**Important:** All IDs and passwords are case-sensitive, and must be entered exactly as they were set.

The Security Administration dialog box opens.



- 3 It is suggested you change the Administrator Login name and Password the first time you set up security. To do so, type the new information in the Administrator Login area.

**Important:** Be sure to keep a record of this password. If it is lost it cannot be recovered, and it can only be reset by reinstalling TrustedLink Windows.

## Adding a New User

### To add a new user

- 1 In the Security Administration window, click **Add**.

The Add a User window opens.

- 2 Type a user name and password and click **OK**.

The User List displays the new name.

## Setting the Security Level

To activate security, select one of the following options on the Security Administration dialog box:

- **Intermediate**—A password is required for login only once per day. That is, you enter a password for the first TrustedLink Windows module opened (for example, Operations or Administration). After that, you can start any TrustedLink Windows module without a password for the rest of that day, even if you have closed all modules.
- **Maximum**—At this level, a password is required to start any TrustedLink Windows module at any time.
- **No Security**—Turns security off. You can access TrustedLink Windows at any time without passwords.

All changes made on this window take effect when you click **Exit**. To close the window without saving changes, click **Cancel**.

### Using Security

When security is activated, a login dialog box opens when you start a TrustedLink Windows module.



You must enter a valid user name and password to continue. The administrator name and password is also valid for login.

### Resetting Security after Logging In

If Intermediate security is active and you have already logged in once for the day, you can reset the system to require a password to start TrustedLink Windows again that day. For example, you can prevent someone from running TrustedLink Windows on your PC after you have left for the day.

#### To reset the security after logging in

Do one of the following:

- Exit the Operations window with the **Exit and Log Off** command.
- In TrustedLink Windows Administration, click **Tools > Reset Security**.

### Changing a User Password

A user password can be changed at the time the user logs in.

#### To change a user password

- When the login dialog box opens, select the **Change password after login** check box.



The Change Password dialog box opens.



- 2 Type the new password in both boxes.
- 3 Click **OK**.

The password is changed.

**Important:** Be sure to keep a record of the password. Once a user password is changed from the one set initially by the administrator, neither the administrator nor anyone else has access to it. A lost password cannot be recovered.

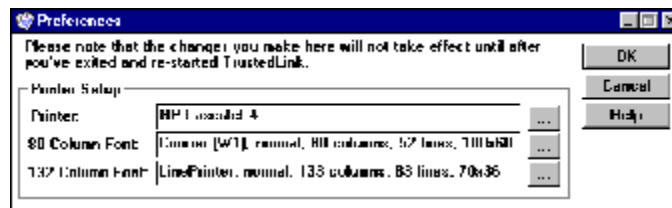
## Setting Up Printer Preferences

TrustedLink Windows Administration Preferences are used to select the fonts for printing reports from the Reports menu.

Preferences determining how TrustedLink Windows operates are set in Operations. See “Setting Preferences” on page 109 for more information.

### To set printer font preferences

In TrustedLink Windows Administration, click **File > Preferences**.



The following options are available:

Option	Purpose	To change setting:
Printer	TrustedLink Windows prints to the Windows default printer.	Do not use. Selecting another printer does not change the printer. Change the default printer setting in Windows.

Option	Purpose	To change setting:
80 Column Font	Select the font to use when printing a document in 80-column format.	Click the ellipsis button (...) and select a new font. The fonts listed are all fixed-width fonts supported by the currently selected printer.
132 Column Font	Select the font to use when printing a document in 132-column format.	Click the ellipsis button (...) and select a new font. The fonts listed are all fixed-width fonts supported by the currently selected printer.

## Rebuilding Database Tables

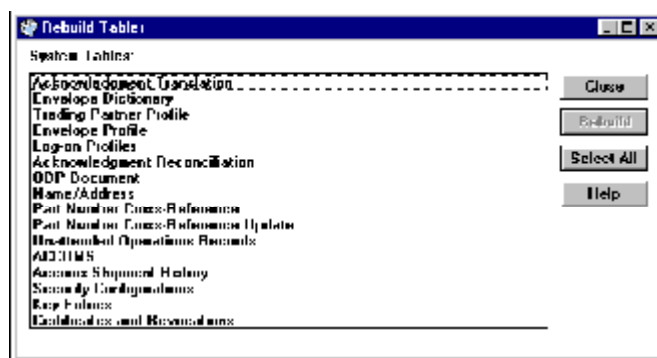
You can use the Rebuild Tables function to repair corrupted database table indexes. Ordinarily you only use this function if instructed to do so by a Inovis Customer Support representative.

### How to Rebuild Tables

#### To rebuild tables

- In TrustedLink Windows Administration, click **Tools > Rebuild Tables**.

The Rebuild Tables window opens.



- Select one or more tables and click **Rebuild**.

## Administering AS2 Connectivity

**Important:** This section applies only to backward compatibility for BizConnect versions 2.4.x and 3.0. It does not apply to the current BizConnect releases, v3.1.x and 3.2.

If you use AS2 to transmit documents to trading partners, you might need to access BizConnect to verify various settings, activate a new BizConnect license, or extract server owner profile information.

- “Accessing BizConnect from TrustedLink Windows” on page 241
- “Replacing Certificates Using BizConnect” on page 241
- “Renewing a BizConnect License” on page 242
- “Activating a BizConnect License” on page 242
- “Starting BizConnect as a Service” on page 242





- “Extracting a Server Owner Profile Using BizConnect” on page 243
- “Verifying Server Owner Settings Using BizConnect” on page 243
- “Verifying AS2 Trading Partners Using BizConnect” on page 243

### Accessing BizConnect from TrustedLink Windows

**Important:** Do not change the administrator user ID and password referenced in this procedure. If you change these values, TrustedLink Windows will not be able to access BizConnect.

#### To access BizConnect from TrustedLink Windows

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.
- 2 Select either:
  - **Edit > AS2 Configuration**
  - **Trading Partners**, then select an AS2 trading partner and click **Edit > AS2 Options**.
- 3 Click **Advanced**.  
The BizManager/BizConnect logon screen opens.
- 4 Type the administrator user ID and password (**admin/admin**), and click **Log On**.
- 5 Click **User’s Guide** or **Help** to access the BizConnect documentation.

### Replacing Certificates Using BizConnect

When the certificate you send to your trading partners for AS2 communications expires, you must replace it, then send the new certificate to your trading partners. You can either purchase a signing or encryption certificate from a certificate authority, such as Verisign, or you can use BizConnect to create the certificate.

**Note:** If you add a new certificate, ensure the AS2 transport setting in TrustedLink Windows points to the new certificate. See “Defining Server Owner Properties for AS2 Communications” on page 37.

#### To add a new certificate using BizConnect

- 1 Open BizConnect as described in “Accessing BizConnect from TrustedLink Windows” on page 241.
- 2 Select **Parties tab > Party List > Server Owner**.  
The Party Detail page opens.
- 3 Next to Certificates tab, click **Add**.
- 4 Type the name under which you want to save the certificate; for example, Signing and Encryption.
- 5 Select the Trusted check box.
- 6 For Source, select **Generate New**.
- 7 Scroll down the page, and type the information for your organization.
- 8 For Usage, select both the Encryption and Signing check boxes.
- 9 Click **Submit**.

The new certificate displays on the certificate list on the Party Detail page.

- 10 To export the certificate, go to “Exporting a Certificate to Your Local Computer” on page 36.

### Renewing a BizConnect License

When you start TrustedLink Windows Operations or Administration 30 days before your BizConnect license expires, TrustedLink Windows issues a warning message. Contact Inovis Sales at 1-877-446-6847 to upgrade your maintenance agreement. Inovis will send you a new BizConnect license.

### Activating a BizConnect License

You obtain a new license from Inovis Sales (new installations) or Customer Support (renewals). See “Renewing a BizConnect License” on page 242.

**Note:** The license source file must be on your local computer when you activate it.

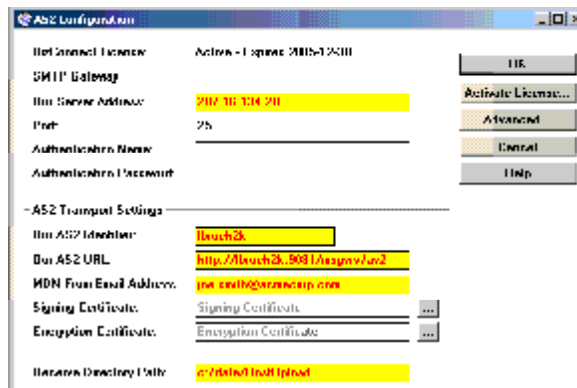
### To activate the BizConnect license in TrustedLink Windows

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Administration**.

The TrustedLink Windows Administration window opens.

- 2 Select **Edit > AS2 Configuration**.

The AS2 Configuration window opens.



Click **Activate License** to activate the BizConnect license.

- 3 Click **Activate License**.

The Activate License window opens.

- 4 Type a description of the license.
- 5 Click **Browse** to navigate to the license source file.
- 6 Click **Open**.
- 7 Click **OK** to activate the license.

### Starting BizConnect as a Service

After it has been started as a service, BizConnect continues to run even if TrustedLink Windows is shut down. This means AS2 messages continue to be received and acknowledged (MDNs sent) as long as the computer is on and connected to the Internet.

### To verify BizConnect is running

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > TrustedLink Windows Operations > Utilities > Module Administration**.



- 2 Check the status in the AS2 Connectivity portion of the window.

**To start BizConnect as a service**

- 1 Click **Start > Settings > Control Panel > Administrative Tools > Services**.
- 2 Right-click on BizManager BizConnect, and select **Start**.

**Extracting a Server Owner Profile Using BizConnect**

Only for trading partners who use BizManager products, use this procedure to create an XML file containing the server owner's identifier, transport settings, and an encrypted element containing the certificate.

**Important:** This is not the usual way to exchange information and certificates with trading partners who do not use BizManager products. See “Adding a Certificate for Your Company” on page 36 and “Exporting a Certificate to Your Local Computer” on page 36.

**To extract a server owner profile using BizConnect**

- 1 Open BizConnect as described in “Accessing BizConnect from TrustedLink Windows” on page 241.
- 2 Click **Parties** tab > **Server Owner**.
- 3 Under Exchange Profile tab, select the exchange profile.  
The Update Profile wizard opens.
- 4 Click **Next**.
- 5 Edit the transport settings as appropriate.
- 6 Click **Next**.
- 7 Type any installation instructions you want to include with the extract file.
- 8 Click **Next**.  
A message indicates the exchange profile was created.
- 9 Follow the instructions to view and download the exchange profile, or e-mail the exchange profile to a trading partner.

**Verifying Server Owner Settings Using BizConnect****To verify server owner settings defined in TrustedLink Windows**

- 1 Open BizConnect as described in “Accessing BizConnect from TrustedLink Windows”.
- 2 Click **Parties** tab > **Server Owner**.
- 3 Under Server Owners tab, click **Server Owner**.
- 4 Under Identifiers tab, you should see the AS2 identifier and e-mail address you defined for the server owner in TrustedLink Windows.

**Verifying AS2 Trading Partners Using BizConnect****To verify AS2 trading partners defined in TrustedLink Windows**

- 1 Open BizConnect as described in “Accessing BizConnect from TrustedLink Windows” on page 241.
- 2 Click **Parties** tab.
- 3 Under External Trading Partners tab, verify the trading partner is listed.

## Re-Registering TrustedLink Windows

If you upgrade your TrustedLink Windows license or purchase the optional Remote User Interface after TrustedLink Windows is installed, you must re-register TrustedLink Windows to activate the new License Key.

For the Remote User Interface, you must re-register TrustedLink Windows *before* installing the Remote User Interface (as described in the *TrustedLink Windows Installation Guide*).

**Note:** Obtain the Package ID and License Key numbers from the Installation Cover Sheet in your TrustedLink Windows package (if your software was shipped to you), or the License Key tab on the Inovis e-Delivery site (if you downloaded your software from your e-Delivery account).

### To re-register TLW before installing the Remote User Interface

- 1 Click **Start > Programs > Inovis > TrustedLink Windows > Utilities > Network Registration**.

The TrustedLink Windows Product Registration panel opens.

- 2 In the Package ID and License Key fields, type the Package ID and License Key provided with TrustedLink Windows.
- 3 Click **Next**, and follow the on-screen instructions.

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# TrustedLink Windows Flat File Layout



**T**his appendix describes the layout of a flat file to be created or processed by a Forms Overlay:

- “Flat File Terminology” on page 245
- “Flat File Parameters” on page 246
- “Flat File Naming Convention” on page 246
- “Viewing or Printing a Flat File Layout” on page 246
- “Modifying a Flat File Layout” on page 247
- “Flat File Header Record Layout” on page 248

For more information on using flat files to create documents with Forms Overlays, see:

- Chapter 6, “Processing Incoming Documents”
- Chapter 7, “Preparing Outgoing Documents”

## Flat File Terminology

This section describes the flat filing terms used in this manual:

**Flat File Parameters**—Settings that govern the overall structure of a flat file. These settings include the record length, and whether the flat file uses fixed or variable record lengths and field lengths. All records in the flat file have the same parameters.

Terms used in flat file parameters:

- **Fixed Record Length**—Indicates all records in the flat file are the same length, with no carriage return/line feed characters between them. Records are padded with spaces to the required length.
- **Variable Record Length**—Indicates records in the flat file might vary in length, up to the maximum length specified in the Forms Overlay. Trailing spaces are removed from each record, which is terminated with a carriage return/line feed combination. This is a

standard DOS text file. Any fields at the end of the record that do not contain data are omitted.

- **Fixed Field Length**—Indicates each field is always the same length. Each field is identified by its position in the record. Data in a fixed-length field is padded with spaces if necessary to reach the specified size.
- **Variable Field Length**—Indicates the fields have trailing spaces removed and are separated by the separator character defined in the Forms Overlay. Variable-length fields can only be used with variable-length records.
- **Flat File Layout**—Defines the relationship between the Forms Overlay and the flat file. The layout specifies which fields in the flat file correspond to which fields on the Forms Overlay. Details about each field, such as data type, field length (for fixed-length fields), and the associated segment and element are included.
- **Flat File Header Record**—The flat file layout also specifies the structure and contents of the flat file header record. TrustedLink® Windows uses the header record to separate the individual documents in the flat file, and to process the data (for example, to send the document to the correct trading partner).

## Flat File Parameters

The flat file parameters include:

- Fixed or variable record length
- Fixed or variable field length

These parameters are specified in the Forms Overlay. To see the flat file parameters for a particular Forms Overlay, see “Viewing or Printing a Flat File Layout” on page 246.

## Flat File Naming Convention

The file naming convention is DX-XF-*r**l**mm*, where the variables *r*, *l*, and *mm* are determined by the flat file parameters:

Variable	Description	Values	Meaning
<i>r</i>	record length	<b>F</b>	fixed record length
		<b>V</b>	variable record length
<i>l</i>	field length	<b>F</b>	fixed field length
		<b>V</b>	variable field length with separators
<i>mm</i>	maximum record length	080 to 512	number of characters in maximum record length

### EXAMPLE

The file name DX-XF-VF.080 indicates variable record length (V), fixed field length (F), and maximum record length 80.

## Viewing or Printing a Flat File Layout

When viewing a flat file layout, do not change any of the flat filing parameters unless your flat filing requirements have changed.

## Viewing or Printing the Layout

### To view or print the flat file layout for a Forms Overlay:

- 1 On the Operations screen, select one of the following from the **Go** menu:
  - Forms Builder for a Data Entry Overlay
  - Report Generator for a Print Overlay

The Forms Builder or Report Generator opens in a new window.

- 2 Open the Forms Overlay.
- 3 Go to the **Tools** menu and select **Flat File**.

The Flat File Layout Settings window displays the flat filing parameters.

- 4 Click **Generate**.

The flat file layout is displayed in a new window.

- 5 To print the layout, click **Print** in this window.

### To view more information about flat file layouts and forms overlays

- Click **Help** > **TrustedLink Windows Forms User Guide**.

## COBOL and C/C++ Flat File Layouts

When you view a flat file layout, two files are automatically created which contain record layouts in formats usable by COBOL and C/C++ compilers. These files describe the layouts of flat files created using fixed-length fields and variable- and fixed-length records.

These layout files can be inserted into the source code of your application:

- DXFLTYT.CBL contains an ANSI-74 COBOL-compatible description of the file layout.
- DXFLTYT.H contains structure definitions for a flat file and is usable by C/C++ compilers.

Both files are placed in the MAPDATA folder in the main TrustedLink directory:

C:\Program Files\Inovis\TrustedLink\MAPDATA

It is possible for two or more fields within the same record to have the same field name, since the field names in the record definitions of these files are taken from the elements' descriptions. For this reason, it might be necessary to assign each element field in the Forms Overlay a unique name (for example, Quantity1 and Quantity2).

To assign a unique name to each element field, modify the Forms Overlay Parking Lot using the TrustedLink Forms Turnaround Editor. For instructions, see the *TrustedLink Windows Forms User Guide* on the **Help** menu in Operations.

## Modifying a Flat File Layout

To modify a flat file layout, open the Forms Overlay as described in "Viewing or Printing a Flat File Layout" on page 246.

### To include or exclude a field in the flat file

Double-click the field, and check or clear the Flat File check box.

### To adjust the maximum length of a field

- 1 Go to the **Tools** > **Edit Parking Lot**.

The Turnaround Editor starts and opens the Parking Lot.

**2** Right-click the field and select **Edit**.

A dialog box lists the element properties. The minimum and maximum lengths are set in the dialog box.

**3** Click **Save the Current Parking Lot**.

You are returned to Forms Builder or Report Generator.

**4** Double-click the field. In the Edit Field dialog box, set the digits to the correct number.

**To view instructions about making other modifications to forms overlays**

Click **Help** > **TrustedLink Windows Forms User Guide**.

## Flat File Header Record Layout

Each document in a flat file that is created or to be processed by TrustedLink has a header record preceding it. This header record identifies the sending or receiving trading partner, as well as the document number and document type. The header record permits the flat file to contain different types of documents received from or to be sent to different trading partners.

### Header Record for Flat Files from EDI Documents

The header record for a fixed-length flat file created by mapping EDI documents to flat files is in the following format:

Position	Contents
1 – 2	//
3 – 9	Not used.
10 – 12	Three-character document ID code. This position contains the transaction code for an X12 transaction, or a blank for an EDIFACT message.
13 – 24	Up to 12-character trading partner code.
25 – 54	Up to 30-character document number.
55	Blank.
56 – 65	Up to 10-character extended document ID code. If this is an EDIFACT message, the six-character message ID code is in positions 56 through 61.
66 – 71	Up to six-character document class code.
72 – 80	Not used.

When using a variable record length with field delimiters, the fields in this header record are in the order shown in the preceding table, separated by the character defined as the separator character in the Forms Overlay.

### Header Record for Flat Files Mapped to EDI

The format of the header record for a fixed-length flat file used for mapping flat files to EDI documents is slightly different from that used for EDI-to-flat file documents:

Position	Contents
1 – 2	//
3 – 9	Not used.



Position	Contents
10 – 12	Three-character document ID code. If this is an X12 transaction, this position must contain the transaction code. If this is an EDIFACT message, leave this field blank.
13 – 24	Up to 12-character trading partner code.
25 – 54	Up to 30-character document number.
55	P—Partial translation. Partially-translated documents are placed in the Incomplete folder. If blank, translated documents are placed directly in the Out folder.
56 – 65	Up to 10-character extended document ID code. If this is an EDIFACT message, place the six-character message ID code in positions 56 through 61.
66 – 71	Up to six-character document class code (optional).
72 – 74	Optional three-character Forms Overlay code. If present, this overrides the Forms Overlay assignment in the trading partner definition for this trading partner and document type.
75 – 80	Not used.

When using variable record length with field delimiters, the fields in this record are in the order shown in the preceding table, separated by the character defined as the separator character in the Forms Overlay.



# VAT Reports and TAXCON Messages



**U**nited Kingdom customers: If you did not select the TAXCON option during installation, contact Customer Support to enable it.

Value Added Tax (VAT) is a tax on the final consumption of certain goods and services in the UK home market. VAT is collected at every stage of production and distribution by HM Customs and Excise.

TrustedLink can automatically generate and store VAT reporting information from e-Commerce invoices. This requires the transmission of EDIFACT TAXCON (Tax Control) messages within the interchanges that contain the invoices. The TAXCON message summarizes VAT information in a format acceptable to HM Customs and Excise.

**Important:** Before you begin processing VAT electronically, contact the VAT Business Advice Centre with at least one month's notice. They will explain the conditions and requirements in detail.

For instruction on setting up TrustedLink to process TAXCON messages:

- "Setting up Trading Partners for TAXCON" on page 251
- "Sending Invoices with TAXCON Messages" on page 253
- "Receiving Invoices with TAXCON Messages" on page 254
- "VAT Reports" on page 254

## Setting up Trading Partners for TAXCON

Set up TAXCON message processing for each trading partner that exchanges VAT information. TrustedLink® Windows then automatically creates VAT reports when you send or receive invoices containing VAT information.

The method for setting up TAXCON processing depends on how the trading partner definition was created. Follow the appropriate instructions:

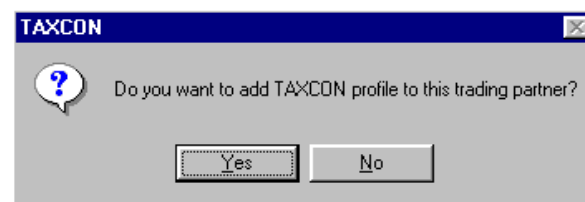
- "New Trading Partners Created Manually" on page 252
- "Existing or Automatically Created Trading Partners" on page 252

## New Trading Partners Created Manually

### To set up TAXCON processing for a new trading partner definition

- 1 Follow the instructions for “Creating a Trading Partner” on page 49. To enable TAXCON processing, a trading partner definition must use:
  - EDIFACT e-Commerce standard
  - Interchange without Group (UNB-UNH) envelope structure
- 2 Add a document definition for the INVOIC message to this trading partner. See “Adding Document Types” on page 50 for instructions.

When you click **Next** after selecting the INVOIC message, a message asks:



- 3 Click **Yes**.
- 4 Follow the onscreen instructions to add the document type.

## Existing or Automatically Created Trading Partners

To add TAXCON message processing to trading partners that are already set up with an INVOIC message definition, you must delete and re-create the INVOIC message definition for the trading partner. If a TAXCON message definition already exists for the trading partner, you must also delete and re-create it.

**Important:** Before you delete a message definition, record the settings for it.

Follow these instructions to add TAXCON processing to existing trading partners:

- “Recording and Deleting Current Message Definitions” on page 252
- “Re-creating INVOIC Definition for TAXCON Processing” on page 253

## Recording and Deleting Current Message Definitions

### To record and delete the current settings for a message definition



- 1 Open TrustedLink Administration.
- 2 Click **Trading Partners**.  
The Trading Partners window opens.
- 3 Select the trading partner and click **Edit**.  
The Trading Partner Control Panel opens.
- 4 In the Message Information list, select the INVOIC message and click **Maps/Forms**.  
The Map and Forms Assignments window opens.
- 5 Record the forms and maps assigned to the INVOIC message for this trading partner.  
Click **OK** to close the window.
- 6 With the INVOIC message selected, click **UNH Details**.

The EDIFACT Message Definition window opens.

- 7** Record the values in each field of the INVOIC message definition. Click **OK** to close the EDIFACT Message Definition window.
- 8** With the INVOIC message still selected in the Message Information (UNH) list, click **Delete**.
- 9** If a TAXCON message definition is shown in the Message Information list, repeat steps 4 through 8 for the TAXCON message.

### Re-creating INVOIC Definition for TAXCON Processing

#### To re-create INVOIC definition & add TAXCON trading partner processing

- 1** On the Trading Partner Control Panel, click **Add**.  
The Select Documents window opens.
- 2** Select the **INVOIC** message type and click **Next**.  
A message asks you to add the TAXCON profile.
- 3** Click **Yes**.  
The Assign Overlays and Maps window opens.
- 4** Assign the overlays or maps you recorded for the INVOIC message type in step 5 of “Recording and Deleting Current Message Definitions” on page 252.
- 5** Click **Next**.  
The Assign Overlays and Maps window opens.
- 6** If applicable, assign overlays or maps to TAXCON message (usually, no overlays or maps need to be assigned for TAXCON messages).
- 7** Click **Finish**.  
The INVOIC and TAXCON messages are shown in the Message Information list.
- 8** Select the INVOIC message and click **UNH Details**.
- 9** Enter the INVOIC message definition you recorded in step 7 of “Recording and Deleting Current Message Definitions” on page 252. Click **OK**.
- 10** Select the TAXCON message and click **UNH Details**.
- 11** If a TAXCON definition previously existed for the trading partner, re-enter the TAXCON message definition you recorded in step 7 of “Recording and Deleting Current Message Definitions” on page 252.
- 12** Click **TAXCON Details**.
- 13** Enter the VAT report information for your company and this trading partner. Click **OK** in all open windows.

### Sending Invoices with TAXCON Messages

When you send EDIFACT invoices to a trading partner set up for TAXCON processing, TrustedLink automatically:

- Creates a TAXCON message summarizing the VAT information in the invoices, including the TAXCON Details specified in the trading partner definition.
- Adds the TAXCON message to the interchange containing the invoices.

- Creates a text-format VAT report and saves the report to the \VATRPT\Sender subfolder of the main TrustedLink folder. See “VAT Report Locations and File Names”.
- Creates an error report instead of a VAT report in the \VATRPT\Sender subfolder if processing errors are encountered. See “VAT Error Report Files” on page 254.

## Receiving Invoices with TAXCON Messages

When you receive TAXCON messages from a trading partner set up for TAXCON processing, TrustedLink automatically:

- Compares the totals in the TAXCON message with the associated INVOIC messages in the same interchange.
- If the totals agree, creates a text-format VAT report and saves the report in the \VATRPT\Receiver subfolder of the main TrustedLink folder.
- If the totals do not agree, displays a message and creates a text-format error report in the \VATRPT\Receiver subfolder of the main TrustedLink folder. See “VAT Error Report Files” on page 254 for more information.

**Important:** TrustedLink cannot produce VAT reports directly from INVOIC messages. In order to generate VAT reports for a trading partner, you must receive TAXCON messages from them.

## VAT Reports

Once TAXCON message processing is set up for the appropriate trading partners, TrustedLink automatically creates VAT reports based on the TAXCON messages you send or receive from those trading partners.

### VAT Report Locations and File Names

VAT reports are text files saved in subfolders of the main TrustedLink folder. The default is C:\Program Files\Inovis\TrustedLink\. VAT reports for received or sent invoices are saved in separate subfolders:

Invoice	Default Subfolder for Reports
Received	\Program Files\Inovis\TrustedLink\VATRPT\Receiver
Sent	\Program Files\Inovis\TrustedLink\VATRPT\Sender

TrustedLink assigns a report file name based on the trading partner name and the date and time of transmission. VAT reports have the file extension .VAT.

#### EXAMPLE

Foundation Trading\_REF00001\_010727\_1429.VAT

Foundation	Trading_REF00001_010727_1429	.VAT
	Trading Partner Name	Transmission Date and Time

### VAT Error Report Files

If TrustedLink encounters problems creating a VAT report, it instead creates an error report. Text-format error reports are stored and named similarly to VAT reports, as described in “VAT

Report Locations and File Names” on page 254, except the error reports have the file extension .VTE instead of .VAT.

Use any text editor or Windows Notepad to open the .VTE file for details about the cause of the errors.





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