

Standard Operating Procedure (SOP) for Partner Onboarding & EDI
810 Processing in Altova MapForce

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Effective Date: [26/02/2025]
Version: 1.0

1. Folder Structure in Production System

To support **EDI 810** processing in the **Production System**, the following **structured folder hierarchy** must be created.

❖ Root Folder for Each Client

For each **new client**, a **Root Folder** must be created on the **Desktop of the Production System**; e.g. '*Xcel_Energy*'. This client-specific folder will contain the following necessary **subfolders** to manage the EDI 810 workflow:

Folder Name	Purpose
ACK Folder	Stores acknowledgment (997) files received from partners.
Archive	Backup storage for incoming EDI 810 files.
Error Folder	Stores files that fail processing due to errors.
Incoming/Automation Folder	Receives EDI 810 files; files are processed and moved to Archive.
Outgoing Folder	Stores outbound EDI 997 acknowledgment files.
Temp Folder	Temporary storage for intermediate processing files.
Testing Folder	Used for testing new configurations before moving to production.

2. Documents to Collect from the Client

Before beginning the mapping and integration process, the following documents must be collected and analysed:

- ✓ **Altova Implementation Guide** – Defines mapping rules and specifications.
- ✓ **Sample Input File** – Example of EDI 810 data received from the client.
- ✓ **Sample Output File** – Expected transformed output after processing.

3. Partner Onboarding & Initial Setup

- ✓ Identify the new partner's data format (EDI 810, CSV).
- ✓ Obtain sample files for validation.

- ✓ Set up necessary credentials for FTP/SFTP communication.
- ✓ Ensure the Automation Folder structure is in place for data processing.

Output: Partner onboarding document with required credentials and file formats.

4. 810 Mapping Guidelines for EDI-Client Name

Prepare a mapping guideline based on:

- ✓ **The Altova Implementation Guide**
- ✓ **Sample Input File**
- ✓ **Sample Output File**
- ✓ **Client Confirmation** – Share the mapping guideline with the client and obtain approval before proceeding with map development.

5. Map Development & Deployment

- ✓ **Develop the map** based on the approved mapping guideline.
- ✓ **Save the completed map** in the APEX_EDI server.
- ✓ **Deploy the map** in the **FlowForce Server** by entering:

- Server Address
 - Port Number
 - Username and Password
 - Deployment Path
- ✓ Click **Save** to complete the deployment.

6. FlowForce Server Configuration

- ✓ **Log in** to the FlowForce Server.
- ✓ Navigate to the **Configuration Tab**.
- ✓ Verify that the folders have been created correctly.
- ✓ Confirm that the map file is available in the correct folder.

7. Creating a Job Schedule in FlowForce

Step 1: Define the Job

- ✓ Enter the **Job Name** and **Description**.

Job Live_XcelEnergy in /Live/XcelEnergy

Job description: XcelEnergy

Name	Type	Date modified	Modified by	Next run
XcelEnergy.EDI_DB.Live.mapping	MapForce mapping	2025-02-24 00:30:3	root	
XcelEnergy.Notification.mapping	MapForce mapping	2025-02-24 00:31:5	root	
Live_XcelEnergy	job	2025-02-25 10:01:0	root	<button>View log</button>
Transfer_Files_FTP_XcelEnergy	job	2025-02-25 09:45:4	root	2025-02-27 04:00:0 <button>View log</button>

Example: Job Schedule- Live/XcelEnergy

Job Input Parameters

Name: triggerfile

Type: String

Description: This parameter receives the filename or URI that triggered the job execution via file system or HTTP request.

Job Input Parameters

Name: triggerfile	Type: string	Default:	Description: This parameter receives the filename or URI that
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Execution Steps

The screenshot shows the execution steps for an XSLT transformation. The steps are as follows:

- Execute function /Live/XcelEnergy/XcelEnergy(Notification.mapping) with {triggerfile} for 810. Text file.csv for Text file and C:\Users\LZone1\Desktop\EDI-XCELENERGY\Temp for Working-directory.
- Execute function /system/compute with read-lines('C:\Users\LZone1\Desktop\EDI-XCELENERGY\Temp\Text file.csv') for Expression, result stored in lines.
- Execute function /system/compute with nth(lines, 1) for Expression, result stored in row.
- Execute function /system/compute with split(row, ',') for Expression, result stored in NewRow.
- Execute function /system/compute with nth(NewRow, 4) for Expression, result stored in FileName.
- Execute function /system/compute with nth(NewRow, 5) for Expression, result stored in AckFileName.
- Execute function /Live/XcelEnergy/XcelEnergy_EDI_DB_Live.mapping with {triggerfile} for 810. (AckFileName) for 997 and C:\Users\LZone1\Desktop\EDI-XCELENERGY\Outgoing for Working-directory.
- Execute function /system/ftp/store with 65.124.207.34 for FTP Server, 21 for Port, [AckFileName] for Source file, [AckFileName] for Target file and C:\Users\LZone1\Desktop\EDI-XCELENERGY\Outgoing for Working directory.
- Execute function /system/filesystem/copy with [AckFileName] for Source, C:\Users\LZone1\Desktop\EDI-XCELENERGY\Ack for Target, true for Overwrite, true for Abort on error and C:\Users\LZone1\Desktop\EDI-XCELENERGY\Outgoing for Working directory.
- Execute function /system/filesystem/move with [triggerfile] for Source, C:\Users\LZone1\Desktop\EDI-XCELENERGY\Archive for Target, true for Overwrite target and true for Abort on error.
- Execute function /system/mail/send with InvoicesDI@radiuspoint.com for From, EDI@radiuspoint.com.modi.lokesh89@gmail.com for To, XCELENERGY Invoice has been processed successfully - (Altova) for Subject, Hi, Please find the attached Business Acknowledge. Thank You, RadiusPoint for Message body, C:\Users\LZone1\Desktop\EDI-XCELENERGY\Temp\Text file.csv for Attachment and true for Abort on error.

Execute function- Ex-/Live/XcelEnergy/XcelEnergy_Notification.mapping

Parameters:	810: (input)	{triggerfile}
	Text file: (output)	Text file.csv
	Working-directory:	C:\Users\LZone1\Desktop\EDI-XCELENERGY\Temp

Execute function - /system/compute

Expression- **read-lines('C:\Users\LZone1\Desktop\EDI-XCELENERGY\Temp\Text file.csv')**

Assign this step's result to as T0

Execute function-- /system/compute

Expression- **nth(lines, 1)**

Assign this step's result to as T0

Execute function-/system/compute

Expression- **split(row, ',')**

Assign this step's result to as T0

Execute function-/system/compute

Expression- **nth(NewRow, 4)**

Assign this step's result to as T0

Execute function- /system/compute

Expression- **nth(NewRow, 5)**

Assign this step's result to as T0

Execute function- /Live/XcelEnergy/XcelEnergy_EDI_DB_Live.mapping

Parameters:	810:	{triggerfile}
	810:	{triggerfile}
	997: (output)	{AckFileName}
Working-directory:	C:\Users\LZone1\Desktop\EDI-XCELENERGY\Outgoing	

Execute function- /system/ftp/store

Execute function /system/ftp/store

Parameters:	FTP Server:	65.124.207.34
	Port:	21
	Directory on host:	<input type="button" value="+"/>
	Login credentials:	<input type="button" value="+"/>
	Use passive mode:	<input type="button" value="+"/>
	Use SSL/TLS encryption:	<input type="button" value="+"/>
	Verify server certificate:	<input type="button" value="+"/>
	Server certificate:	<input type="button" value="+"/>
	Source file:	{AckFileName}
	Target file:	{AckFileName}
	Abort on error:	<input type="button" value="+"/>
	Working directory:	C:\Users\LZone1\Desktop\EDI-XCELENERGY\Outgoing
	Account:	<input type="button" value="+"/>

Execute function- /system/filesystem/copy

Parameters:	Source:	{AckFileName}
	Target:	C:\Users\LZone1\Desktop\EDI-XCELENERGY\Ack
	Overwrite:	<input checked="" type="checkbox"/>
	Abort on error:	<input checked="" type="checkbox"/>
	Working directory:	C:\Users\LZone1\Desktop\EDI-XCELENERGY\Outgoing

Execute function- /system/filesystem/move

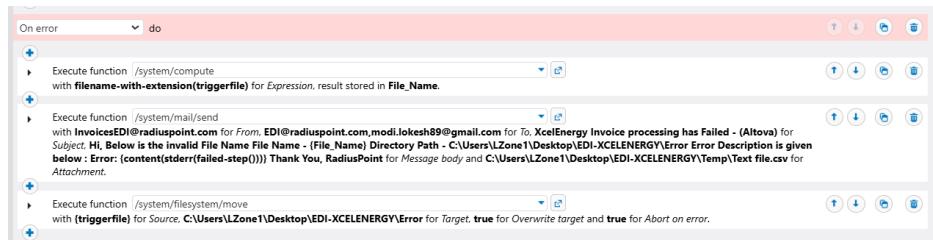
Parameter s	Source:	{triggerfile}
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Target:	C:\Users\LZone1\Desktop\EDI-XCELENERGY\Archive
Overwrite target:	<input checked="" type="checkbox"/>
Abort on error:	<input checked="" type="checkbox"/>

Execute function- /system/mail/send

Parameters :	From:	InvoicesEDI@radiuspoint.com
	To:	EDI@radiuspoint.com,modi.lokesh89@gmail.com
	Subject:	XCELENERGY Invoice has been processed successfully - (Altova)
	Message body:	<p>Hi,</p> <p>Please find the attached Business Acknowledge.</p> <p>Thank You, RadiusPoint</p>
	Attachment:	C:\Users\LZone1\Desktop\EDI-XCELENERGY\Temp\Text file.csv
	Abort on error:	<input checked="" type="checkbox"/>

ON ERROR



Execute function- /system/compute

Expression- **filename-with-extension (triggerfile)**

Assign this step's result to - File_Name

Execute function- /system/mail/send

Parameters:	From:	InvoicesEDI@radiuspoint.com
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To:	EDI@radiuspoint.com,modi.lokesh89@gmail.com
Subject:	XcelEnergy Invoice processing has Failed - (Altova)
Message body:	<p>Hi,</p> <p>Below is the invalid File Name</p> <p>File Name - {File_Name} Directory Path - C:\Users\LZone1\Desktop\EDI-XCELENERGY>Error</p> <p>Error Description is given below :</p> <p>Error: {content(stderr(failed-step()))}</p> <p>Thank You, RadiusPoint</p>
Attachment:	C:\Users\LZone1\Desktop\EDI-XCELENERGY\Temp\Text file.csv

Step 2: Configure Triggers

Triggers

Check: Newly Created of file or directory: C:\Users\LZone1\Desktop\EDI-XCELENERGY\Incoming polling interval: 30 seconds. Wait: 0 seconds for settle.

Start: +

Expires: +

Time zone: America/New_York

enabled

- ✓ Select New Trigger.
- ✓ Set the **Directory Path** (Ex-C:\Users\LZone1\Desktop\EDI-XCELENERGY\Incoming)
- ✓ Configure:
 - **Polling Interval**
 - **Wait Time (Seconds)**
 - **Start Date**
 - ✓ Enable the Trigger.

Step 3: Configure Credentials

Credential

Run job using credential: Select existing credential: Define local credential: User name: radiuspointhq\lzone1

Password:

- ✓ Select Local Credential.
- ✓ Enter the **Username (root)** and **Password (root)**.

Example: Job Schedule- Transfer Files FTP XcelEnergy

Execution Steps

Execute function- /system/sftp/connect

Parameters:	Host:	65.124.207.34
	Port:	22
	Login credentials:	<input type="radio"/> Select existing credential: <input checked="" type="radio"/> Define local credential: <input checked="" type="checkbox"/>
	User name:	User Name
Password: Retrieve password Change password		

Assign this step's result to - TEST

Execute function- /system/sftp/list-files

Parameters:	SFTP connection:	TEST
	Wildcard:	/radiuspoint_edi/from_pge/*.*

Assign this step's result to – list

Execute function- /system/filesystem/move

Parameter s:	Source:	{triggerfile}
	Target:	C:\Users\LZone1\Desktop\EDI-XCELENERGY\Error
	Overwrite target:	<input checked="" type="checkbox"/>
	Abort on error:	<input checked="" type="checkbox"/>

Execute function- /system/compute

Expression- `split(item, '/')`

Assign this step's result to – Newitem

Execute function- `/system/compute`

Expression `-nth(Newitem, 3)`

Assign this step's result to - FileName

Execute function- `/system/mail/send`

From: InvoicesEDI@radiuspoint.com
To: edi@radiuspoint.com,modi.lokesh89@gmail.com
Subject: XCELENERGY File Received
Message body:
Hi,
We have received new XCELENERGY Invoices into SFTP location.
File Name - {FileName}

Thank You,Radius Point

Triggers

Run every day(s)

Repeat minutes the whole day, or from to

Start:

Expires:

Time zone:

enabled

✓ Click **Save** to complete the job setup.

8. Exception Handling & Troubleshooting

Issue	Action	Owner
Invalid EDI 810 format	Notify partner, request corrected file	EDI Team
MapForce Processing Failure	Debug mapping, check logs, retry	IT Team
FTP Transmission Failure	Verify credentials, retry connection	IT Team
Missing Acknowledgment (997)	Manually trigger or investigate	Data Integration Team

9. Tools & Resources

- ✓ Altova MapForce (Data transformation)
- ✓ FTP Server (File transfer)
- ✓ Automation Folder (EDI 810 storage)
- ✓ Email Notifications (Error alerts)
- ✓ FlowForce Server (Server automation)
- ✓ Altova XML Spy or Notepad++ (CSV and EDI viewer/Editor)
- ✓ MS SQL Server (Backend)

10. Escalation Matrix

Priority	Response Time	Contact
Critical (System Down)	2 Hours	IT Support
High (Failed EDI Processing)	4 Hours	Data Integration Team
Medium (Mapping Issues)	24 Hours	Partner Support

11. Approval

- ✓ Prepared by: [Perumal Gojjala]
- ✓ Reviewed by: [Leejoy]
- ✓ Approved by: [Leejoy]

Final Notes & Best Practices

- ✓ Always validate the EDI 810 files before processing.
- ✓ Ensure backup copies are stored in the **Archive Folder**.
- ✓ Use the **Testing Folder** for new client onboarding before moving to production.
- ✓ Monitor the **Error Folder** for failed files and take corrective actions.
- ✓ Keep a record of client approvals for mapping guidelines.