



User Guide
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GXS Inovisworks User Guide

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Getting Started



Inovisworks is a web-based service providing visibility into Inoivisworks and Managed Services. Inoivisworks, the GXS value added network (VAN), securely exchanges information regardless of data type, network, or connectivity standards.

This topic covers registration, logon procedures, navigation procedures, and a general overview of Inoivisworks tabs.

- “Audience” on page 15
- “Essential Information” on page 15
- “Registration” on page 15
- “Inoivisworks Conventions” on page 16
- “Login Information” on page 17
- “About Inoivisworks Tabs” on page 19
- “Roles and Functions” on page 19
- “Additional Inoivisworks Services” on page 25
- “Viewing and Printing the User Guide PDF” on page 26
- “Viewing the Online Tutorial” on page 27

Audience

This guide is written for all Inoivisworks customers. The guide assumes you have experience using a desktop computer and some knowledge of electronic data interchange (EDI).

Essential Information

What you see in Inoivisworks is based on your login ID and password. Consequently, there might be times when you cannot perform the tasks listed or see all of the fields described in this guide.

Registration

Users of GXS TrustedLink Enterprise, TrustedLink iSeries, TrustedLink Windows, or Mapper are automatically registered with Inoivisworks through their product registration. Inoivisworks assigns the Customer Admin role to the person whose name is typed on the product registration page. Only the Customer Admin can add other users to Inoivisworks.

If you need software, see:

- “Free Connectivity and Document Exchange Software” on page 16
- “Translation Software—Managed Services” on page 16

Free Connectivity and Document Exchange Software

If you have no other GXS product and want to use Inovisworks to securely send and receive documents, GXS offers free connectivity software called OnRamp. OnRamp is available through Inovisworks. When you register OnRamp you are automatically registered with Inovisworks.

Note: Inovisworks assigns the Customer Admin role to the person registering your OnRamp software. Only the Customer Admin can add additional users to Inovisworks.

Translation Software—Managed Services

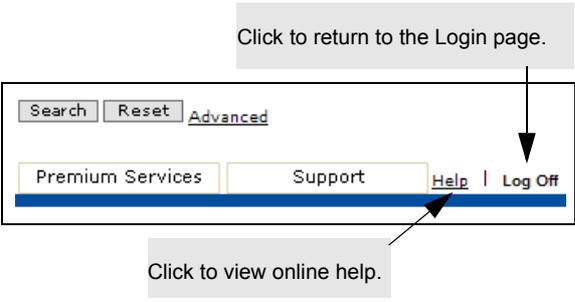
Managed Services is a suite of services providing message brokering, hosted data transformation, web forms, and business process services.

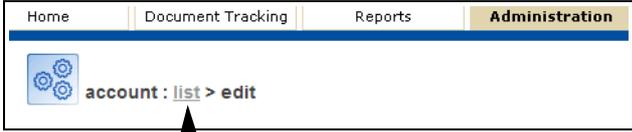
If you need managed services capabilities, contact an GXS sales representative about setting up the service for your company.

Inovisworks Conventions

Conventions used throughout Inovisworks:

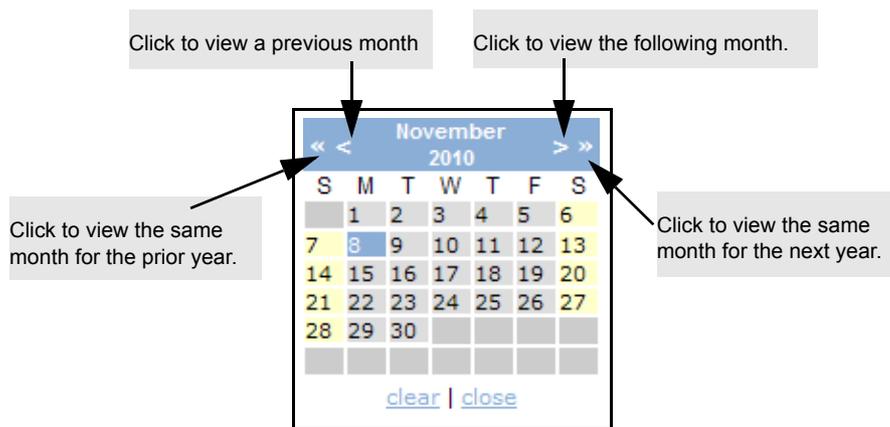
Important: Your browser Back button is not supported. Use the Previous button or “Breadcrumbs” on page 17 to return to an earlier page.

Convention	Description
Required fields	Indicated by an asterisk (*).
Online Help	<p>To the right of the tabs and always available.</p> <ul style="list-style-type: none"> ■ Click Help to view online help. ■ Click FAQ Help in the left pane of a tab to view frequently asked questions (FAQs) about the functions available from the tab.
Log Off	<p>To the right of the tabs, click Log Off to return to the Inovisworks Login page.</p> <div style="text-align: center;">  </div>

Convention	Description
Breadcrumbs	<p>Clickable links that show you where you are in Inovisworks and how you got there.</p>  <p>Click a breadcrumb link to return to a previously selected page.</p>
Calendar icon	Allows dates to be selected from a calendar (see “Using the Calendar Icon” on page 17).

Using the Calendar Icon

When a date field needs an entry, the calendar icon allows you to verify and select calendar dates.



To select a date

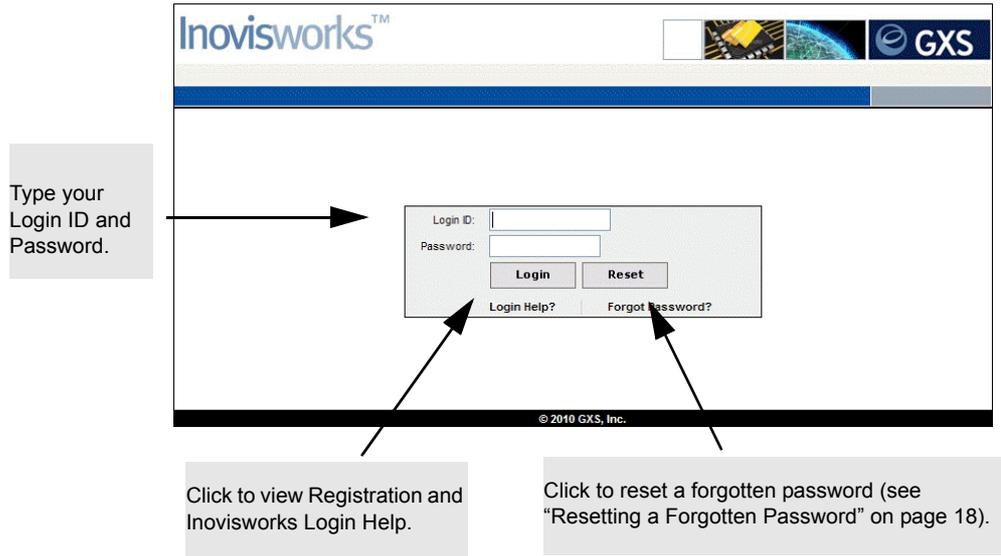
- 1 Click a calendar icon next to a date field.
- 2 Use the arrows to go to a specific month.
Click the date you want.

Login Information

Use this procedure to login to Inovisworks after registration is complete.

To login to Inoivisworks after registration is complete

- 1 On the Inoivisworks Login page, type your **Login ID** and **Password**.



Note: Login IDs and passwords are case sensitive.

- 2 Click **Login**.

The Inoivisworks Home tab opens. For more information about using the Home tab, see “Using the Home Tab” on page 30.

You might find it useful to bookmark the Inoivisworks login page.

Resetting a Forgotten Password

To reset a forgotten password

- 1 On the Inoivisworks Login page, click **Forgot Password?**
- 2 Type your Login ID and email address. Click **Continue**.
- 3 Type your answer to the password question. Click **Continue**.

A message indicates an email has been sent so you can reset your password.

- 4 Click **Continue**.
- 5 Go to the email message from GXS and click the link.
Note: For security purposes, the link is only active for 30 minutes.

- 6 Type your answer to the password question. Click **Continue**.
- 7 Type a new password in the New Password and Confirm New Password fields. Click **Change Password**.

The Inoivisworks Login page opens. You can use your new password to log on.

About Inovisworks Tabs

Features and functions are grouped by tabs: Home, Document Tracking, Reports, Administration, Premium Services, and Support.

Search by

Home **Document Tracking** Reports Administration Premium Services Support

For tab descriptions, see “Inovisworks Tabs” on page 19.

Inovisworks Tabs

Tab Name:	Use this Tab to...
Home	View a document Transaction Summary, System Messages, the services to which you subscribe, and Add a Service. From the navigation panel you can also: <ul style="list-style-type: none"> Find GXS contact information. View system messages. View or edit profiles. Search for accounts or trading partners. See “Using the Home Tab” on page 30.
Document Tracking	Search for and track inbound and outbound documents using a Basic, Advanced, or Quick search. See “Document Tracking Tab” on page 37.
Reports	View Billing Usage, Document Summary, Trading Partner, and other reports. See “Reports Tab” on page 75.
Administration	Maintain Accounts, Trading Partners, Customer, and User information. See “Administration Tab” on page 101.
Premium Services	Access premium GXS services, including marketing information about new products.
Support	<ul style="list-style-type: none"> Contact Support View messages See “Support Tab” on page 153.

Roles and Functions

Customer and user maintenance functions (tasks) are defined by your assigned Inovisworks role. Your Inovisworks logon ID defines your role. Your role defines the functions (tasks) and pages you can view within Inovisworks.

The following topics provide detailed information about roles, the functions assigned to each role, and their recommended usage.

- “Roles” on page 20
- “Example of General Role Usage—Customer Admin and Customer User Roles” on page 21
- “Example of Limited Role Usage—Account Admin and Account User” on page 22
- “Functions Based on Roles” on page 23

Roles

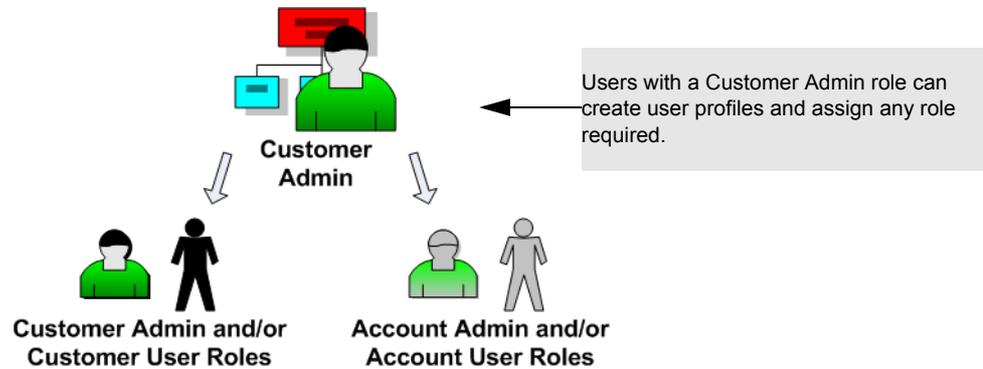
Roles define a group of functions. Functions represent tasks that can be performed in Inovisworks. A role is assigned to a login ID.

These roles are available:

Name of role	Additional information
<ul style="list-style-type: none"> ■ Customer Admin ■ Customer User 	<p>Individuals with the Customer Admin or Account Admin role assigned to their user profile can assign roles to user profiles.</p> <p>Important: Inovisworks automatically assigns the Customer Admin role to the login ID defined during registration.</p> <p>See “Example of General Role Usage—Customer Admin and Customer User Roles” on page 21.</p>
<ul style="list-style-type: none"> ■ Account Admin ■ Account User 	<p>Individuals with the Account Admin or Account User role assigned to their user profile are typically responsible for managing specific third party accounts (PSNs).</p> <p>When logged in to Inovisworks, users with these roles cannot access the Support Tab.</p> <p>See “Example of Limited Role Usage—Account Admin and Account User” on page 22.</p>

Assigning User Roles

When a company registers with Inovisworks, a user profile is automatically created with a Customer Admin role assigned. This Customer Admin can then create additional user profiles assigned with a Customer Admin / Customer User or Account Admin / Account User roles. Any user with a Customer Admin role can create user profiles.



The Account Admin and User roles have limited access to the account (PSNs) to which they are assigned. Available functions apply only to the account (PSN) to which they are associated.

The following table illustrates functions a high level comparison of roles:

Task	Customer Admin	Account Admin	Customer User	Account User
Home	X	X *	X	X *
Document Tracking	X	X *	X	X *
Run reports	X		X	
View / Add / Edit accounts	X	X *	X	X *
View acknowledgements	X	X *	X	X *

Task	Customer Admin	Account Admin	Customer User	Account User
Manual acknowledgements	X		X	
Search announcements		X *		X *
Archive and restore	X		X	
View and edit customer information	X		X	
Document Scheduler	X			
Account Scheduler	X		X	
Change password	X		X	
Rule maintenance	X		X	
View Trading Partner	X	X *	X	X *
Add / Delete Trading Partner	X		X	
Maintain user profiles	X			
Access Customer Support	X		X	

* For account (PSN) assigned only.

Each role has specific functions assigned. The following topics provide examples of intended use of these roles:

- “Example of General Role Usage—Customer Admin and Customer User Roles” on page 21
- “Example of Limited Role Usage—Account Admin and Account User” on page 22

Example of General Role Usage—Customer Admin and Customer User Roles

Joe works for Acme Corporation. He was automatically assigned the Customer Admin role because he was the person who registered Acme Corporation with Inovisworks. Upon registering, he obtained:

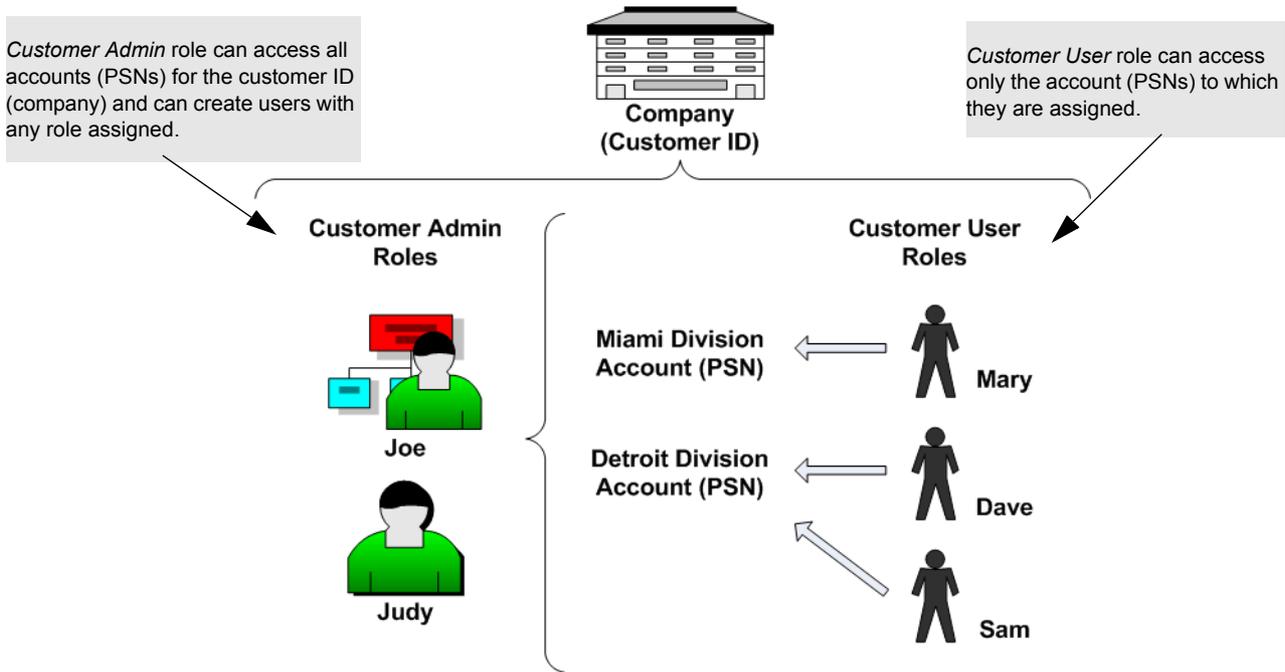
- A Customer ID which identifies the company on Inovisworks.
- An account (PSN) for the Miami Division.

Note: After registering, Joe added a second Account (PSN) for the Detroit Division.

To manage Acme’s accounts, the following roles are available:

- A Customer Admin can access information for all accounts (PSNs) associated with a customer company ID on Inovisworks, and can create additional user profiles with a Customer Admin or Customer User role assigned.
- A Customer User can access only the account (PSNs) to which they are assigned.

In this example, Joe assigned a Customer Admin role to Judy and assigned Customer User roles to Mary, Dave and Sam. Mary was granted access to the Miami Division account (PSN). Dave and Sam were granted access to the Detroit Division account.



Example of Limited Role Usage—Account Admin and Account User

Building on the example described in “Example of General Role Usage—Customer Admin and Customer User Roles,” the Acme Corporation decided to have a Third Party Company represent their Atlanta and Dallas Divisions.

This Third Party Company is registered on Inovisworks and has its own Customer ID. The Third Party Company can represent multiple accounts (PSNs) and have different Accounts (PSNs) established for each company they represent.

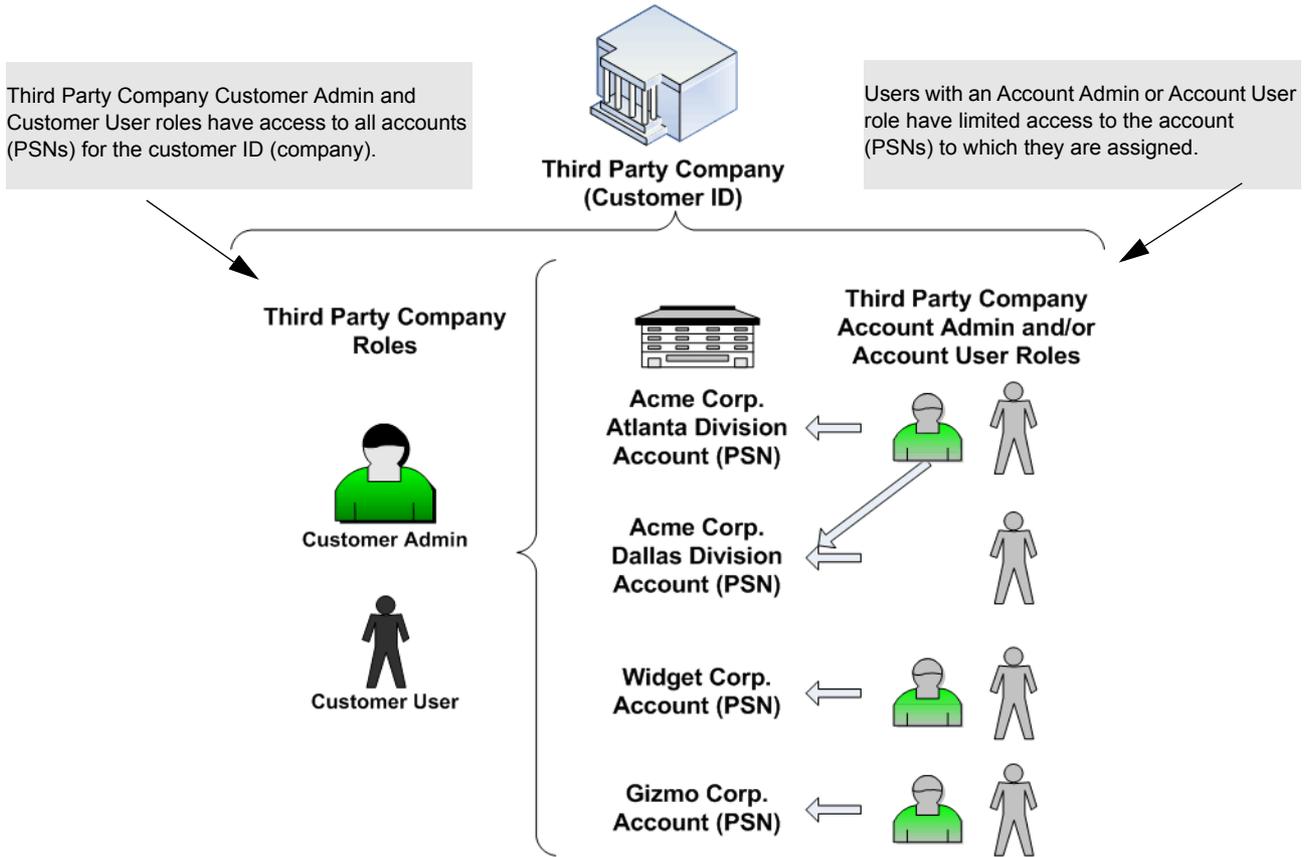
Additional roles are available to access and manage the individual account (PSNs) with limited access.

- An Account Admin has limited access to information and administrative functions for the assigned account (PSN).
- An Account User has limited access only to the assigned account (PSN).

Important: These roles prohibit the Account Admin or User from seeing account information for other accounts that a Third Party Company account Company ID represents, or other accounts that you have registered for your own company.

In this example, one Account Admin has limited access to each of the Acme division accounts (PSNs). An Account User is assigned to view the information for each division. Two other

companies listed have one Account Admin and one Account User role assigned to the Account (PSN).



Functions Based on Roles

The table lists all the functions that are assigned to each role. The functions are grouped based on the tabs and links in Inovisworks.

Important: These functions—and the roles to which they are assigned—are subject to change.

Function/Task	Customer Admin	Customer User	Account Admin	Account User
Home				
Contact GXS	x	x	x	x
View GXS Messages	x	x	x	x
Search for Accounts	x	x	x	x
Update My Profile	x	x	x	x
View Transaction Summary	x	x	x	x
Document Tracking				
Quick Search	x	x	x	x
Basic Search	x	x	x	x
Advanced Search	x	x	x	x
List Documents	x	x	x	x

Function/Task	Customer Admin	Customer User	Account Admin	Account User
View Document	x	x	x	x
View Document Details	x	x	x	x
View Document Summary	x	x		
Export Document	x		x	x
Hold Document	x		x	
Reprocess Document	x		x	
Resend Document	x		x	
Release Hold Document	x		x	
Reports				
View Billing Usage Report	x	x		
View Document Summary Report	x	x		
Create FTP Interactive Audit Report	x	x		
Create FTP On-Demand Report	x	x		
View Payer Beneficiary Report	x			
Setup Recurring Report	x	x		
View Trading Partner Report	x	x		
View MS Document Summary Report	x	x		
View MS Trading Partner Report	x	x		
View MS Transaction Summary Report	x	x		
Accounts				
Add Account	x			
Edit Account	x	x	x	
View Accounts	x	x	x	x
List Accounts	x	x		
Add Trading Profile	x		x	
Event Notification				
Edit Notification Settings	x		x	
Add Notification Settings	x		x	
Delete Notification Settings	x		x	
View Notification Settings	x	x	x	x
Add Address Book	x		x	
Edit Address Book	x		x	
View Address Book	x	x	x	x
Delete Address Book	x		x	
Unsubscribe from Notification	x	x	x	x
Acknowledgement Reconciliation (premium service)				
View Ack Reconciliation Config	x		x	x
Manual Acknowledgement	x	x		
Archive and Restore (premium service)				
Add, edit, view archive configurations	x			

Function/Task	Customer Admin	Customer User	Account Admin	Account User
Search for archived documents	x	x	x	x
Customer				
View Customer	x	x		
Edit Customer	x	x		
Document Scheduler				
Add, edit, delete, and view document scheduler	x			
View document schedules	x	x		
Password				
Change Password	x	x		
Trading Partners				
Add Trading Partner	x		x	
View Trading Partner	x	x	x	x
Delete Trading Partner	x		x	
Users				
Add User	x			
Edit Users	x			
Delete User	x			
View User	x			
List Users	x			
Customer Support				
Contact Customer Support	x	x		
Send and Receive Support Messages	x	x		

Additional Inovisworks Services

Additional Inovisworks functionality and services can help you better manage your business.

- “Document Rules” on page 25
- “Acknowledgement Reconciliation” on page 26
- “Archive and Restore” on page 26
- “Cross-Reference Tables” on page 26

Document Rules

Document rules can specify how you want your documents routed through the GXS network to your trading partners. After they are implemented, document rules can, for example, automatically:

- Copy a document to one or more trading partners
- Convert characters in a document to other characters
- Change the receiver or sender of a document
- Deliver a document to a recipient, then copy it to additional trading partners

Additional document rules are available.

To have document rules set up for your documents, contact the GXS Solution Center at +1 877.446.6847.

Acknowledgement Reconciliation

Functional acknowledgement (FA) reconciliation is a service. Inovisworks monitors the documents you send to trading partners to ensure your trading partners receive and acknowledge the documents by sending FAs in the time frame you specify. The service lets you better manage your business because you can address and resolve exception situations quickly.

To sign up for the FA reconciliation service, contact the GXS Solution Center at +1 877.446.6847.

Archive and Restore

Archive and restore is a service that lets you use Inovisworks to store documents sent and received within a specific time period. You can search for archived documents, view their details, and restore them as needed.

To sign up for the archive and restore service, contact the GXS Solution Center at +1 877.446.6847.

Cross-Reference Tables

Managed Services customers can subscribe to the cross-reference table premium service. The cross-reference tables, which identify fields with specific values in EDI documents, are used to replace and validate information in documents during transformation. The service lets customers update the tables as needed.

To sign up for the cross-reference table service, contact the GXS Solution Center at +1 877.446.6847.

Viewing and Printing the User Guide PDF

To view and print the *Inovisworks User Guide* you need the free Adobe Acrobat Reader 6.0. The *Inovisworks User Guide* PDF content is the same as the Help files connected to this application.

The date on your printed documentation indicates the date of release (see “Saving a PDF to Your Hard Drive” on page 26). Check Inovisworks Support for updated information.

Saving a PDF to Your Hard Drive

To save a User Guide PDF to your hard drive

- 1 Click **Help** to access the online help system.
- 2 If the Internet Explorer security message appears, click the message and select **Allow Blocked Content** > click **Yes**.



The help system opens.

- 3 Select any topic and go to the bottom of the page.

4 Click View or Print a User Guide PDF.

A PDF of the Inovisworks User Guide opens.

5 To save the PDF to your hard drive, click Save a Copy.**6 Navigate to the location where you want to save the PDF > click Save.**

The Inovisworks User Guide PDF is available on your hard drive.

Viewing the Online Tutorial

To take full advantage of Inovisworks, view the online tutorial.

To view the Inovisworks online tutorial**1 Click Help to access the online help system.****2 If the Internet Explorer security message appears, click the message and select Allow Blocked Content > click Yes.**

The help system opens.

3 In the left pane, click Getting Started.**4 Click Online Tutorial >**

http://training.inovis.com/Breeze/inovisworks_overview/index.htm

When you log in to Inoivisworks the Home tab opens. The tab initially displays a summary of transactions for all account (PSNs) available to the login ID.

- “Using the Home Tab” on page 30
- “Viewing GXS Contact Information” on page 30
- “Viewing Messages” on page 30
- “Updating Your Own Profile” on page 31
- “Using the Account Selection Area” on page 32
- “Viewing the Transaction Summary Graph” on page 33
- “Viewing the Acknowledgement Status Summary Graph” on page 34

Using the Home Tab

Account Selection area.
See “Using the Account Selection Area.”

GXS System Messages list
(see “Viewing Messages”).

Inoivisworks function tabs
(see “Inoivisworks Tabs”).

Transaction Summary Graph
shows documents based on document type and status. See “Viewing the Transaction Summary Graph” on page 33.

Navigation panel. Your selection is highlighted.

Transaction Summary Graph.
See “Viewing the Transaction Summary Graph” on page 33.

Transaction Summary Graph legend. A different color represents each document

Lists your current service subscriptions.

Document Type	In Progress	Sent	Received	Errors	Available	Scheduled
870	0	0	0	0	0	0
997	0	0	0	0	0	0
REPORT	0	0	0	0	0	0
860	0	0	0	0	0	0
850	0	0	0	0	0	0
RS	0	0	0	0	0	0

Viewing GXS Contact Information

To view GXS contact information

- Click **Home** tab > **Contact Us**.

A listing of all GXS telephone numbers and email addresses opens.

Viewing Messages

Messages include general announcements, alerts, and any network notices from GXS.

- **To view the full text of a single message**—click the message.

- To view all current messages—click **View All Messages**, or from the navigation panel, click **Messages**.

Message Types	Description
Greeting/ Informational 	General information, such as a new online service.
Alert 	Future downtimes and their expected time frames.
Warning 	Production issues, such as backlogs.
Severe 	Production down time.

Updating Your Own Profile

As part of updating your Inoivisworks profile, you can select the:

- Time zone in which you use Inoivisworks
- Tab you want opened automatically when accessing Inoivisworks
- Default view of the Transaction Summary Graph (transaction or interchange).

To update your user profile

- 1 Click **Home** tab > **My Profile**.

Your user profile opens.

- 2 Type or select your changes.

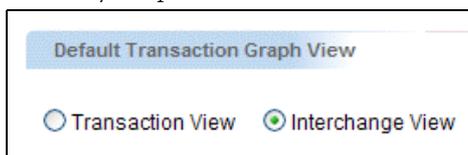
Note: First Name and Last Name are required.

- 3 Select the tab you want to display automatically when you log in to Inoivisworks.



For a description for all tabs, see “Inoivisworks Tabs” on page 19.

- 4 Select the option that reflects how you want information displayed on the Transaction Summary Graph.



If you want the graph to show...	Do this:
Individual transactions within an ISA segment	Select Transaction View .
Transactions at the ISA level only (does not include individual transactions within in the ISA segment)	Select Interchange View .

5 Click Update Profile.

A message lets you know your profile information is edited.

6 Click Done and the Transaction Summary page opens.

Using the Account Selection Area

Use the Account Selection area at the top right of each page to select the account(s) for which you want to view information in Inovisworks. While you can make a selection from this area from any tab, you always return to the Home tab.

From the drop-down list, select one:

- Account (PSN)
- Account (PSN) email
- Trading ID/Qualifier

Type your 'Search by' selection information.

Search by Account (PSN) Search Reset Advanced

Account (PSN) 412908592 - LC GENERIC CUSTOMER Customer ID:501982393 Company Name:LC GENERIC CUSTOMER

From the Account (PSN) drop-down list, select:

- All accounts

or

- A specific account.

Your company identifier and name

To use the account selection area

- 1 Do one of the following:
 - From the drop-down box, select whether you want to search by Account (PSN), Account (PSN) email address, or Trading ID/Qualifier. Then type the **Search by** information.
 - From the drop-down box, select a specific account or select **All** to view all available accounts.

2 Click Search.

The Home Tab opens, displaying the results of your search.

Using the Search Area

The Search option in the navigation pane duplicates the searchable items in the Account Selection area.

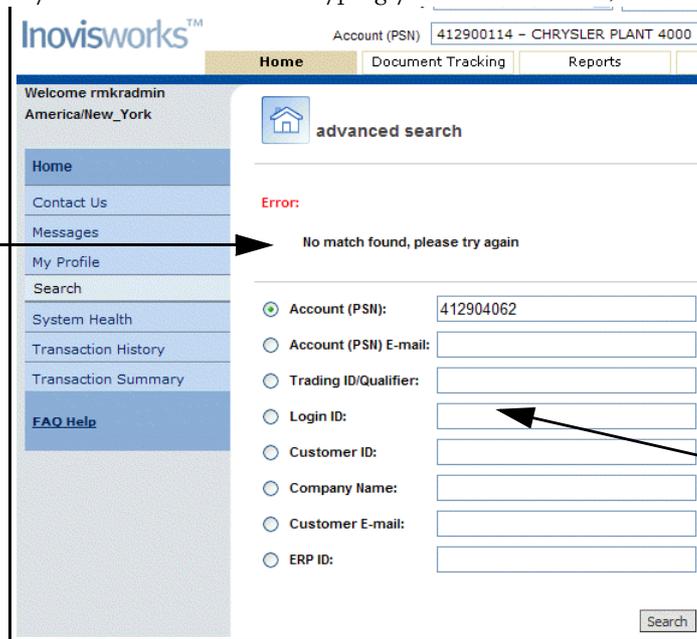
Search by Account (PSN) Search

Account (PSN) 412908592 - LC GENERIC CUSTOMER Customer ID: 412908592

Docum	All	Administration
	41290867 - LC GENERIC CUSTOMER	
	412908592 - LC GENERIC CUSTOMER	

If you make an error when typing your search criteria, the Search page opens.

Displays the error message.
Keeps your initial search criteria.



Retype your search criteria, then click **Search**.

Viewing the Transaction Summary Graph

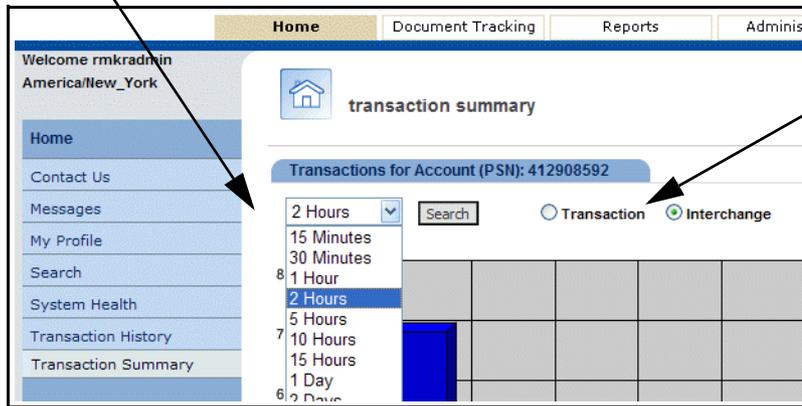
The color-coded status graph on the Home tab shows the type, status, and number of transactions for your account. Each type of document is represented by a different color. For example, blue-green might represent all invoice transactions.

If you:	You see...
Move your cursor over a color-coded area	Document summary information. For example, the number of Invoices in the Available column.
Click a colored-coded area in the graph.	The Document List page opens, listing all documents represented by the selected color in the column. For example, all Available Invoices (see "Using the Document List" on page 49).

To display documents for a specific time period

- 1 From the drop-down list, select a time period in minutes, hours, or days.

From the drop-down list, select a time period in minutes, hours, or days to see time-specific transactions displayed in the Transaction Summary graph.



Select to display Transaction or Interchange information on the graph.

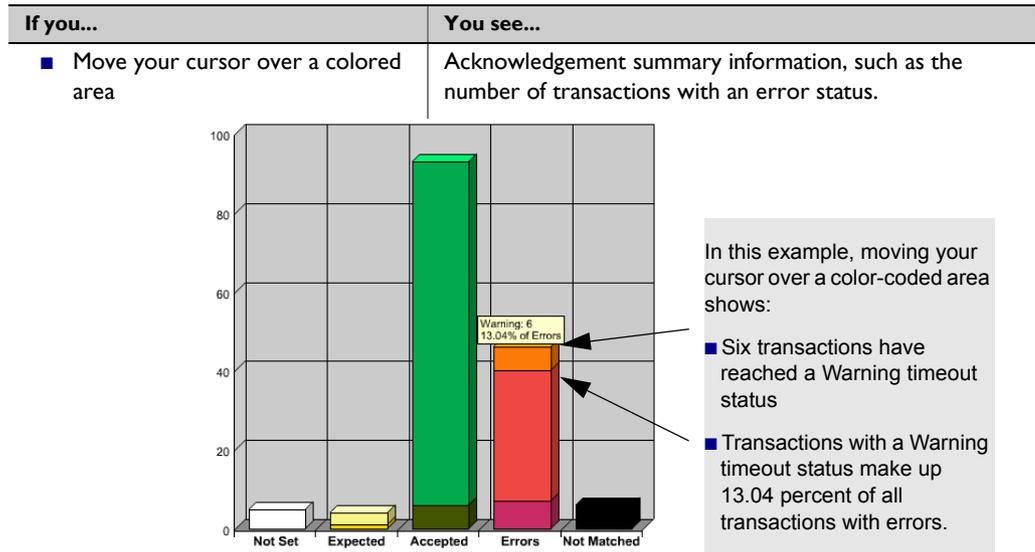
- 2 Click Search.

Your time-specific documents display in the Transaction Summary graph.

Viewing the Acknowledgement Status Summary Graph

If you subscribe to the FA reconciliation service, the Acknowledgement Status Summary Graph displays below the Transaction Summary Graph on the Home tab.

The color-coded Acknowledgement Status Summary Graph lets you view the number of transactions by acknowledgement status.



Click a colored-coded area in the graph.

The Document List page opens, listing all documents represented by the selected color in the column. For example, all Available Invoices (see “Using the Document List” on page 49).

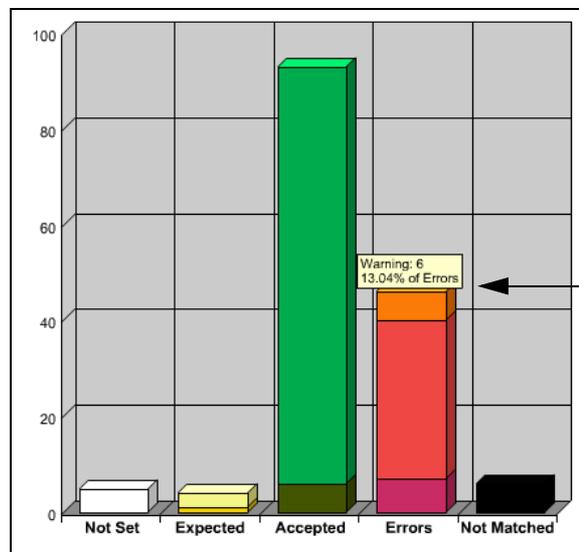
To filter documents on the Ack Status Summary Graph by time period

- From the drop-down list, select the time period in minutes, hours, or days. Click **Search**.

Select to display Transaction or Interchange information on the graph.

- Scroll down to see the Acknowledgement Status Summary Graph.

The graph displays the time-specific transactions by acknowledgement status for the account.



Move your cursor over a colored area to see transaction information.

Use the Document Tracking tab to search for and monitor inbound and outbound documents. Your Trading Partner can view, resend, and in some cases, reprocess documents.

- “Searching for Documents” on page 37
- “Using the Document List” on page 49
- “Document Status” on page 50
- “Document Errors” on page 52
- “Viewing Document Details” on page 52
- “Viewing the Event Tracking Graph” on page 55
- “Viewing Document Content” on page 56
- “Exporting Documents to Your Hard Drive” on page 57
- “Printing Documents” on page 58
- “Resending and Reprocessing Documents” on page 58
- “Placing a Document on Hold” on page 60
- “Taking a Document off Hold” on page 61
- “Selecting Multiple Interchanges” on page 61
- “Monitoring Detailed TGO Message Information” on page 62
- “Tracking Functional Acknowledgements” on page 63

Searching for Documents

Use the Document Tracking tab to find documents:

- “Using the Basic Search Option” on page 38
- “Using the Advanced Search Option” on page 39
- “Using the Quick Search” on page 42
- “Searching for Documents with Errors” on page 44
- “Searching for Hard-to-Find Documents” on page 47
- “Searching for Documents by Session” on page 47
- “Searching for Asynchronous Files” on page 48

Using the Basic Search Option

Using Basic Search, your search can include Inbound documents, Outbound documents, or both.

Note: You can search for up to 35 days of current documents.

To use a basic search for your documents

- 1 Click the **Document Tracking** tab.

The Basic Search page opens.

Note: Always select the document direction first. Document direction determines document status selections.

- 2 Type or select all the information required for your document search.

For field definitions, see “Basic Search Field Definitions” on page 39.

- 3 Click **Basic Search**.

The Document List opens displaying your results. For more information on the Document List page, see “Using the Document List” on page 49.

Basic Search Field Definitions

These are your Basic Search field definitions.

Field	Type or Select
Direction	Inbound, Outbound, or Both as your document direction. Note: Always make this selection first as your choice impacts the remaining available fields. <ul style="list-style-type: none"> ■ Inbound document—Search all documents <i>received by</i> your company from a Trading Partner. ■ Outbound document—Search all documents <i>sent from</i> your company to a Trading Partner. ■ Both—Search all documents.
Status	From the drop-down list, the status of the documents for which you are searching Note: Status selections change based on whether your search is Inbound, Outbound, or Both. For document status information, see “Document Status” on page 50.
Level	<ul style="list-style-type: none"> ■ Interchange—Provides search information at the document level. ■ Transaction (EDI documents only)—If there are multiple transactions within the same document, additional document type and transaction set information is provided. Note: The number of records retrieved is different for each level. For example, for documents with three transaction sets, viewing the Transaction level you see three records; viewing the Interchange level you see one record. <ul style="list-style-type: none"> ■ Session—Returns a list of FTP or pipeline sessions. ■ File—Provides information about FTP files that were sent asynchronously.
Interchange Ack Status OR Transaction Ack Status	Depends on the level selected (Interchange or Transaction). Status of the functional acknowledgement. Note: Displays only if your company subscribes to the Functional Acknowledgement (FA) reconciliation service.
Start Date/End Date	From the calendar icons, the dates to start and end the search. (mm/dd/yyyy format)
Start Time/End Time	From the drop-down lists, the time to start and end the search. The time selection is in 15 minute intervals,
Trading Name	Name of the account (PSN) on which you want to search.
My Trading ID	From the drop-down list, your trading ID.
Partner Trading ID	From the drop-down list, your Trading Partner’s ID.
Partner Qualifier or Free Format	From the drop-down list, your Trading Partner’s qualifier If your partner’s qualifier is not listed, type the entry.

Using the Advanced Search Option

Using the Advanced Search option, your search can include Inbound documents, Outbound documents, or both.

Note: You can search for up to 35 days of current documents.

To perform an advanced search for documents

- 1 Click the **Document Tracking** tab, and from the navigation panel select **Advanced Search**.

Note: Always select the document direction first. Document direction determines document status selections.

These fields filter your Advanced Search beyond the Basic Search options.

- 2 In the Advanced Search fields, type or select all information for your advanced document search.

For field definitions, see “Advanced Search Field Definitions” on page 41.

- 3 Click **Advanced Search**.

The Document List page displays your Advanced Search results.

For more information on the Document List page, see “Using the Document List” on page 49.

Advanced Search Field Definitions

These are your Advanced Search field definitions.

Field	Type or Select
Direction	<p>Inbound, Outbound, or Both as your document direction.</p> <p>Note: Always make this selection first as your choice impacts the remaining available fields.</p> <ul style="list-style-type: none"> ■ Inbound document—Search documents <i>received by</i> your company from a Trading Partner. ■ Outbound document—Search documents <i>sent from</i> your company to a Trading Partner. ■ Both—Search Inbound and Outbound documents.
Status	<p>From the drop-down list, the status of the documents for which you are searching.</p> <p>Note: Status selections change based on whether your search is Inbound, Outbound, or Both.</p> <p>For document status information, see “Document Status” on page 50.</p>
Level	<ul style="list-style-type: none"> ■ Interchange—Provides search information at the document level. ■ Transaction (EDI documents only)—For multiple transactions within the same document, additional document type and transaction set information is provided. <p>Note: The number of records retrieved is based on the level searched. For example, for a document with three transaction sets, viewing the Transaction level you see three records; viewing the Interchange level you see one record.</p> <ul style="list-style-type: none"> ■ Session—Returns a list of FTP or pipeline sessions. ■ File—Provides information about FTP files that were sent asynchronously.
Interchange Ack Status OR Transaction Ack Status	<p>Depends on the level selected (Interchange or Transaction). Status of the functional acknowledgement.</p> <p>Note: Displays only if your company subscribes to the FA reconciliation service.</p>
Start Date/End Date	<p>From the calendar icons, the dates to start and end the search. (mm/dd/yyyy format)</p>
Start Time/End Time	<p>From the drop-down lists, the time to start and end the search. The time selection is in 15 minute intervals,</p>
Trading Name	<p>Name of the account (PSN) on which you want to search.</p>
My Trading ID	<p>From the drop-down list, your Account trading ID.</p>
Partner Trading ID	<p>From the drop-down list, your Trading Partner’s ID.</p>
Partner Qualifier or Free Format	<p>From the drop-down list, your Trading Partner’s qualifier</p> <p>If your partner’s qualifier is not listed, type the entry.</p>
Filename	<p>Name of a file, which can be the exact filename or part of a filename. For example, *.txt</p>
Inbound or Outbound Gateway	<p>From the drop-down list, the Inbound or Outbound gateway through which the document is being routed.</p>

Field	Type or Select
Document Type or Free Text Format	From the drop-down list, the document type you need; for example, PO - Purchase Order (850). or In Free Text Format, type the number or letters that represent the document type, such as IN or 810. For documents that are not listed in the drop-down list, type the number or letters that represent the document type.
Time Zone	Time zone of the person making the query.
For EDI Documents	
ICN	Interchange Control Number.
Group Control Number	Group Control Number at the Transaction level.
Transaction Control Number	Transaction Control Number.

Using the Quick Search

By searching using the Document ID, Application Assigned Number, Session ID, or GXS Transaction ID, the Quick Search option gives you a way to search for a single document or for a single FTP or pipeline session.

- **Document ID**—A unique numeric identifier assigned to the document at the Interchange level. For each Interchange, GXS assigns a Document ID.
- **Application Assigned Number**—A reference number for an Inbound file that is based on different elements in the ST/SE envelope; for example, purchase order number. If you type a purchase order number in the Application Assigned Number field, Inovisworks lists all documents related to the purchase order (see “Extracted Elements for Application Assigned Numbers” on page 43).
- **Session ID**—Identifier for a your FTP or pipeline session.

To quick search for a document

- 1 Click the **Document Tracking** tab.
- 2 In the Quick Search fields, type either the Document ID, Application Assigned Number, the Session ID, or GXS Transaction ID.



- 3 Click **Quick Search**.

The Document List page opens displaying your search results. For more information on the Document List page, see “Using the Document List” on page 49.

Extracted Elements for Application Assigned Numbers

Inovisworks extracts different elements from the ST/SE envelope to create the Application Assigned Number.

Document Type	Extracted Element
ANSI X12	
204	B204
210	B302
214	B1002
220	LI101
504	BGN02
810	BIG02 BIG04 (for purchase order search only)
811	BIG02
812	BCD02 BCD07
820	BPR07 TRN02
823	DEP01 DEP06
824	BGN02 OT103
830	BFR02
840	BQT02
843	BQR02
846	BIA03
850	BEG03
852	XQ04
855	BAK03
856	BSN02 PRF01 (for purchase order search only)
860	BCH03
861	BRA01
862	BSS02
867	BPT02
870	BSR03 PRF01 (for purchase order search only)
875	G5003
876	G9203
880	G0102 G0105
940	W0502
943	W0606 W0602

Document Type	Extracted Element
944	W1703 W1704
945	W0602 W0604
990	B102
EDIFACT	
BANSTA	BGM02
DELFOR	BGM02
DELJIT	BGM02
DESADV	BGM02
HANMOV	BGM02
INSDS	BGM02
INVOIC	BGM02
INVRPT	BGM02
ORDCHG	BGM02
ORDERS	BGM02
ORDERSP	BGM02
PRICAT	BGM02
RECADV	BGM02
SLSRPT	BGM02
SSDCLM	BGM02
SSDRSP	BGM02
TRADACOMS	
CREDIT	CRF01
DELIVR	DEL01
INVOIC	IRF01
ORDERS	ORD01
CORDER	ORD01

Searching for Documents with Errors

To find the cause of document errors

- 1 Click the **Document Tracking** tab.

The Basic Search page opens.

- 2 Search for documents using the Basic, Advanced, or the Quick Search.
For information about document searches, see “Searching for Documents” on page 37.

- 3 From the Status list, select **All Errors**.

- 4 Type all needed information.

For field definitions, see “Basic Search Field Definitions” on page 39 or “Advanced Search Field Definitions” on page 41.

The Document List page lists all error documents, with the error description listed in the Status column. The Document ID, Doc Type, Sender, Receiver, Process Time, and ICN are

also shown. For more information about the Document List page, see “Using the Document List” on page 49.

Search Criteria

- Level: Interchange
- Direction: Both
- Status: All-Errors
- Start Date/Time: 11/09/2010 00:00:00
- ICN
- Inbound Gateway (incoming to GX5):

- Interchange Ack Status: All
- Document Type:
- My Trading ID/Qualifier:
- End Date/Time: 12/01/2010 00:00:00
- Group Control No:
- Outbound Gateway (leaving GX5):
- Time Zone: EST
- Transaction Control No:
- Partner ID/Qualifier:

★ Time Zone: EST

Total Records: 95 Views: 100 Rows Page 1 of 1 First | Previous | Next | Last

* Initiated by Carbon Copy rule

Document ID	Doc Type	Status	Sender	Receiver	Processed Time	ICN	Sender NetworkID	Receiver NetworkID	Ack Status	Original Filename
275511111	DESADV	DataSyntaxError	LC GENERIC CUSTOMER (LCGENERICJ)	IW REBRANDING (WREBRANDINGJ)	11/17/2010 13:42:28	3			N/A	111_BAD_IC_UNEXPECTED_CHARACTERS
275510951	INVFIL	DataSyntaxError	LC GENERIC CUSTOMER (LCGENERICJ)	IW REBRANDING (WREBRANDINGJ)	11/17/2010 13:41:03	481			N/A	108_BAD_IC_INCOMPLETE
275510843	SR	DataSyntaxError	LC GENERIC CUSTOMER (LCGENERICJ)	IW REBRANDING (WREBRANDINGJ)	11/17/2010 13:39:26	00166			N/A	103_BAD_IC_SEG_COUNT
275510712	EDI	DataSyntaxError	LC GENERIC CUSTOMER (LCGENERICJ)	IW REBRANDING (WREBRANDINGJ)	11/17/2010 13:37:33	27509			N/A	102_BAD_IC_DOC_COUNT
275509383	ORDERS	DataSyntaxError	LC GENERIC CUSTOMER (LCGENERICZZ)	IW REBRANDING (WREBRANDINGZZ)	11/17/2010 13:07:27	1680			N/A	113_BAD_IC_UNEXPECTED_OBJECT

5 Click the **Document ID** of the document you need.

The Document Detail page opens graphically displaying the errors (see “Document Detail Page with Errors” on page 46 and “Viewing Document Details” on page 52).

Document Detail Page with Errors

[Previous](#) [Next](#) [Document List](#) [View Events](#)
[View Document](#) [View Document in HEX](#) [Export](#) [Reprocess](#)

Detail

- Document ID: 275504508
- Document Type: W
- Document Status: RulesEngineError
- Document Date: 101111 1117
- Sender: FTPCOMPANY90 (FTPD90ZZ)
- Receiver: W REBRANDING (WREBRANDONRAIMPZZ)
- Standard: EDI_012
- Version: 002002
- Character Count: 1207
- Inbound Gateway: FTP
- Outbound Gateway:
- Acknowledgement Status: Not Set
- Purge After Date: Default

EDI Detail

- Int Ctrl No.: 000261394
- Interchange Date: 101111 1117
- Number of Transaction sets: 1

Set ID	Control Number	Group Control Number	Group Type	App. Assigned No.	Ack Status	Details	Error Messages
810	261394	261394	W	261394	N/A	45841625	

Event

★ Time Zone EST

○ = Not Applicable / In Progress
 ● = Failure
 ● = Succeeded

Event	Date/Time	Session ID	Reason
Validate	11/11/2010 11:17:38	18212044	
Value-Added Process	11/11/2010 11:17:39		
Processing Error	11/11/2010 11:17:41		Reason: Rule Name=[RULE INSTANCE: id(3433)] ruleName([TSQueue]) desc (Triggers DTS Customer processing: Rule created through Registration process.); Error Message=[RULE-00215] Unexpected error: [RTER-00735] DTS BACKUP Queue folder [joptlbr\outsourcing\Backups\101111] does not exist and is not creatable

[View Document](#) [View Document in HEX](#) [Export](#) [Reprocess](#)

Graph's red event indicates where the error occurred. Move your cursor over the red event to view more information.

A full description of the error.

- Correct any errors within the document, then click **Reprocess** on the Document Detail page (see “Reprocessing Documents” on page 60).

Searching for Hard-to-Find Documents

Use the Free Text Field when the document type you want to find is not listed on a drop-down list.

To find hard-to-find documents

- 1 Click the **Document Tracking** tab.

The Basic Search page opens.

- 2 In the lower right, click **Advanced**.

- 3 Type all needed information.

- 4 In Document Type, select the Free Text Format option.

- 5 Type the number or letters that represent the document type that you want to find, such as 812.

The screenshot shows a search interface with the following elements:

- Inbound Gateway (incoming to GXS): [Dropdown]
- Outbound Gateway (leaving GXS): [Dropdown]
- Document Type: [Dropdown menu with 'Free Text Format' selected]
- Search field: [Text input containing '812']
- Time Zone: [Dropdown menu with 'EST -- Eastern Standard Time [GMT-0500]' selected]

A callout box with a grey background and black border contains the text: "Use to find documents that are not listed in the Document Type drop-down list." An arrow points from this box to the search field.

- 6 Click **Advanced Search**.

The Document List page lists all documents of the specific type.

Searching for Documents by Session

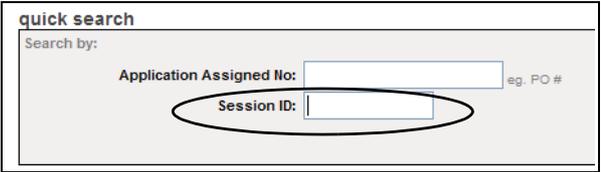
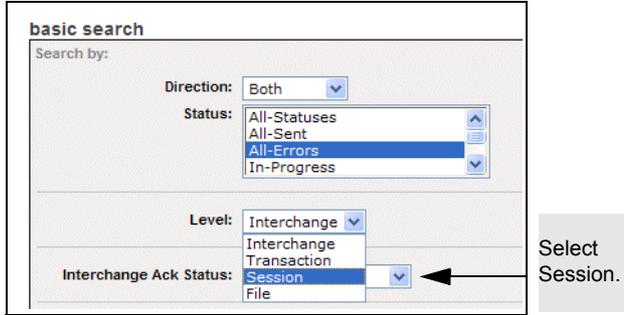
You can view information about documents sent or received during an FTP or pipeline communications session.

Note: The FTP session ID displays when you are logged in to the FTP server. If logging is enabled on your FTP client, the session ID is listed in FTP logs. For pipeline sessions, the session ID is listed in pipeline logs.

To view documents in a session

- 1 Click the **Document Tracking** tab.
- 2 Using a Quick or Basic Search, select your search criteria.

3 Perform the appropriate action:

If you are performing a...	Do this:
Quick Search	<ul style="list-style-type: none"> Type the Session ID. 
Basic Search	<ul style="list-style-type: none"> From the Level drop-down list, select Session. 

4 Click **Quick Search** or **Basic Search**.

The Document List page displays the results of your search.

5 Click the Session ID.

Documents sent or received during the session display (see “Resending Documents Received in a Session” on page 59).

Searching for Asynchronous Files

You can search for files transmitted to GXS in FTP asynchronous mode.

Note: By default, Inovisworks processes files synchronously. If you change FTP session processing to asynchronous to avoid FTP time-outs for larger files, files larger than the default (500 KB) are processed asynchronously. Files smaller than the default are processed synchronously (see “Avoiding FTP Time-Outs” on page 162).

To find asynchronous files

- Click the **Document Tracking** tab.
- Select **File** from the Level drop-down list.



The File Search page opens.

3 Type or select the search criteria.

4 Click **Search** or **Go**.

The File Tracking list opens with the results of your search.

5 Click the File ID to view the contents of the file.

Using the Document List

The Document List page opens from either:

- The Document Tracking tab (see “Searching for Documents” on page 37), or
- Clicking a specific area on the Transaction Summary graph (see “Viewing the Transaction Summary Graph” on page 33).

Your document summary is shown at the top of the Document List page. Column headings depend on whether your search is at the Interchange or Transaction level. The Document List page shown is a document search done at the Interchange level.

Your Search Criteria Summary information.

Click to modify your search options.

To ensure real-time information, click to refresh your view.

Arrow indicates the Doc Type column is sorted in descending order.

From the drop-down list, select the number of documents you want to view per page.

Columns display if you subscribe to FA Reconciliation.

Search Criteria
 • Level: Interchange
 • Direction: Inbound
 • My Trading ID/Qualifier:
 • Start Date/Time: 02/12/2007 00:00:00
 • Interchange Ack Status: All
 • Status: All
 • Partner ID/Qualifier:
 • End Date/Time: 02/13/2007 24:00:00
 ★ Time Zone: New York (Eastern)

Total Records: 742 Views: 100 Rows Page 1 of 8 First | Previous | Next | Last

* Initiated by Carbon Copy rule

Document ID	Doc Type	Status	Sender	Receiver	Processed Time	ICII	OutBound Gateway	Ack Status	Original Filename
262988918 *	SS	Available	LTC ACCOUNT (412901389/ZZ)	CC BILLING COMPANY 29 (CCBILLING29/ZZ)	02/12/2007 16:21:44	000084878	FTP	N/A	3953
262988917	SS	Available	LTC ACCOUNT (412901389/ZZ)	CC BILLING COMPANY 29 (CCBILLING29/ZZ)	02/12/2007 16:21:41	000084878	FTP	N/A	3953
262988968 *	SS	Available	CC BILLING COMPANY 26 (CCBILLING26/ZZ)	CC BILLING COMPANY 26 (CCBILLING26/ZZ)	02/12/2007 16:17:35	000084878	FTP	N/A	3953
262988967	SS	Available	CC BILLING COMPANY 26 (CCBILLING26/ZZ)	CC BILLING COMPANY 27 (CCBILLING27/ZZ)	02/12/2007 16:17:30	000084878	FTP	N/A	3953
262989678	SH	Available	GEORGIATECH (BURDELL/ZZ)	SUPERMAN (KALEL/ZZ)	02/13/2007 08:15:08	000025451	PIPELINE	Accepted w Errors	25451

- Documents are sorted by clicking a column heading. An arrow next to a column heading indicates whether the list is sorted in ascending or descending order

- To perform another search with different selections, click **Modify Search**, and you are returned to your search page which is still populated with your original search information.
- Information is constantly updated. Click **Refresh** on the Document List page to ensure real-time information.

To view the detail for a specific document, click the **Document ID** (see “Viewing Document Details” on page 52).

Document Status

The status assigned to a document can differ based on whether the document is inbound or outbound.

- **Inbound documents**—documents received by your company from a Trading Partner.
- **Outbound documents**—documents sent from your company to a Trading Partner.

Status	Description	Inbound	Outbound
All Statuses	Search for documents with every available status.	X	X
All Sent	Search for all Outbound documents with a Sent status, including: <ul style="list-style-type: none"> ■ In Progress ■ Available ■ Received ■ Hold ■ System Hold ■ Redirected ■ Modified ■ Pending-Interconnect ■ Pending-Comm ■ In-Progress-Ignored 		X
All Errors	Search for all Outbound documents with an Error status, including: <ul style="list-style-type: none"> ■ Comm ■ Data Syntax ■ Data Validation ■ Rules Engine ■ Processing 	X	X
In-Progress	Search for all Outbound documents presently in-progress.		X
Available	Search for all documents available for pickup by the recipient.	X	X
Received	Document was received.	X	X

Status	Description	Inbound	Outbound
Hold	Sender, receiver, or a document rule placed a document on hold. This makes the document unavailable. Note: To put a document on Hold the document must be Available. In addition, both the sender and receiver of the document must use Inoivisworks.	X	X
System Hold	Inoivisworks put the document on hold because the sender's or receiver's account has a Delinquent or Cancel status. Call the GXS billing department to reactivate the account.	X	X
Duplicate	Duplication of a document already sent (see "Duplicate EDI Documents" on page 52).	X	X
Redirected	Document has been redirected within Inoivisworks.		X
Modified	Original document was changed before being sent.		X
Pending Interconnect	Document is waiting to be placed inside a mailbag.		X
Pending Comm	Document has been mailbagged, and the mailbag is waiting to be sent.		X
In-Progress Ignored	Document is on a system that is down. When the system comes back up, the document status changes to In-Progress.		X
Scheduled	Document placed on hold for a specified time and then released.	X	X
TGO Integration Statuses			
Sender Pending Validation	Inoivisworks sent the document to Trading Grid Online (TGO), and is waiting to receive a Success or Warning event from TGO.		X
Sender Suspended	Inoivisworks received a Warning event from TGO, and the document is in quarantine mode from the sender side. Inoivisworks is waiting to receive a Resume or Reject event from TGO.		X
Sender Rejected	Inoivisworks quarantined the document, and the sender rejected the document from the TGO workflow. The document will not be delivered to the receiver.		X
Receiver Pending Validation	Inoivisworks sent a document to TGO, and is waiting to receive a Success or Warning event from TGO.	X	X
Receiver Suspended	Inoivisworks received a Warning event from TGO, and the document is in quarantine mode from receiver side. Inoivisworks is waiting to receive a Resume or Reject event from TGO.	X	X
Receiver Rejected	Inoivisworks quarantined the document, and the receiver rejected the document from the TGO workflow. The document will not be delivered to the receiver.	X	X

Document Errors

The table lists the document error types:

Error Types	Description	Inbound	Outbound
Comm-Error	Document did not reach its recipient. Communications errors occur if: <ul style="list-style-type: none"> ■ the database is down or the connection to the database is lost. ■ your gateway connection is incorrect or lost. ■ a sender transmits a non-EDI document to a receiver who uses async/bisync communications to get documents. 	X	X
Data Syntax Error	Document data is not formatted to standard.	X	X
Data Validation Error	Document has an invalid receiver.	X	X
Rules Engine Error	The rules engine encountered an error.	X	X
Processing Error	An error other than communication, data syntax, data validation, or rules engine error.	X	X

Duplicate EDI Documents

Inovisworks checks for duplicate documents after it parses a document to ensure it meets EDI standards. Inovisworks uses the following information, if available, to determine if a document is a duplicate of another document:

- Sender ID
- Sender Qualifier
- Receiver ID
- Receiver Qualifier
- Interchange Control Number (ICN)
- Interchange Date (from the EDI envelope)
- Interchange Time (from the EDI envelope)
- First 200 characters of the EDI (including EDI envelope)

Note: The way your company processes duplicate documents is defined by GXS staff during the initial set up of an account (PSN). Contact the GXS Solution Center at +1 877.446.6847 if your company wants to change this setting.

Viewing Document Details

The Document Detail page shows detail for a specific document.

To view document details

- 1 Click the **Document Tracking** tab.
- 2 Search for documents using the Basic, Advanced, or the Quick Search.
For information about what searches can be performed with which document status, see “Resending and Reprocessing Documents” on page 58.
- 3 From the “Document Detail Page,” click the Document ID for which you need the detail.

Document Detail Page

Top portion of the Document Detail page:

Click to view Document Content.
See "Viewing Document Content" on page 56.

Click to view Document Event Tracking Graph (see
"Viewing the Event Tracking Graph" on page 55)

The screenshot shows the Document Detail Page interface. At the top, there are navigation links: [Previous](#), [New](#), and [Document List](#). Below these are buttons: [View Document](#), [View Document in HEX](#), [Export](#), and [Reprocess](#). On the right side, there is a [View Events](#) link. The main content is divided into two sections: **Detail** and **EDI Detail**.

Detail section:

- Document ID: 275504505
- Document Type: IN
- Document Status: RulesEngineError
- Document Date: 101111 1117
- Sender: FTPCOMPANY89 (FTPID89/ZZ)
- Receiver: IW REBRANDING (IWREBRANDONRAMP/ZZ)
- Standard: EDI_X12
- Version: 002002
- Character Count: 1207
- Inbound Gateway: FTP
- Outbound Gateway: (empty)
- Acknowledgement Status: Not Set
- Purge After Date: Default

EDI Detail section:

- Int Ctrl No.: 000261401
- Interchange Date: 101111 1117
- Number of Transaction sets: 1

Below the EDI Detail section is a table titled "Transaction Sets":

Set ID	Control Number	Group Control Number	Group Type	App. Assigned No.	Ack Status	Details	Error Messages
810	261401	261401	IN	261401	N/A	4864162Z	

Click to Export, Resend, Reprocess, or View Documents in Hex format.

Text summary of Document Details.

EDI Details and Transaction sets.

Bottom portion of the Document Detail page:

Event

★ Time Zone:EST

Event	Date/Time	Session ID	Reason
Validate	11/11/2010 11:17:36	18012171	
Value-Added Process	11/11/2010 11:17:39		
Processing Error	11/11/2010 11:17:41		Reason: Rule Name=[RULE INSTANCE: id(3433) ruleName(DTSQueue) desc(Triggers DTS Customer processing. Rule created through Registration process.)], Error Message=[RULE-00215] Unexpected error: [RTER-00735] DTS BACKUP Queue folder [/opt/dts/outsourcing/Backups/101111] does not exist and is not creatable

[Previous](#)
[Next](#)
[Back to Documents](#)
[View Detail](#)

Document Event Tracking Graph (see "Viewing the Event Tracking Graph" on page 55 and "Viewing an Event Node Summary" on page 55).

Event Tracking Graph description table.

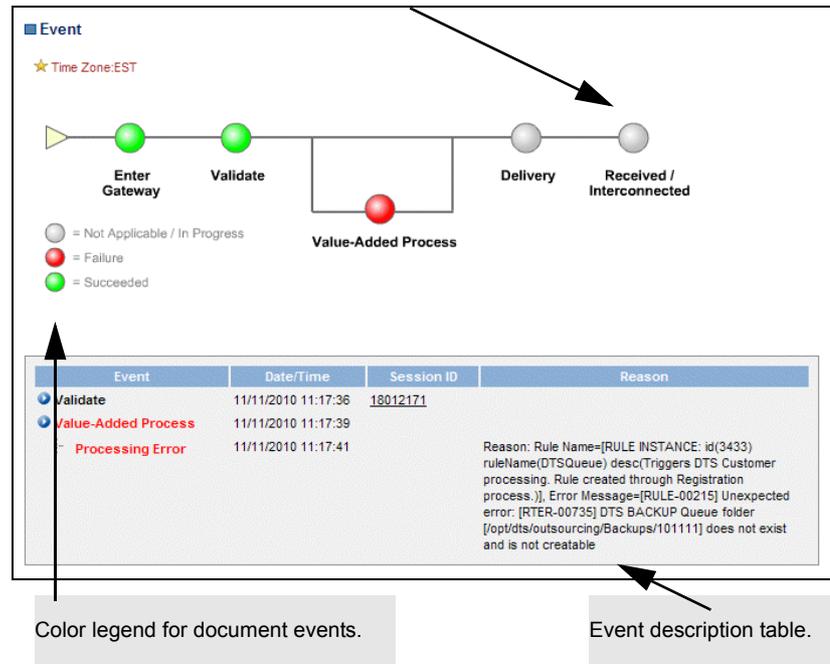
Always use navigation links, such as **Previous**, NOT your browser buttons.

Click to view Document Content (see "Viewing Document Content" on page 56).

Viewing the Event Tracking Graph

On the “Document Detail Page,” the Event Tracking graph shows all main events for a document as it moves through the GXS network.

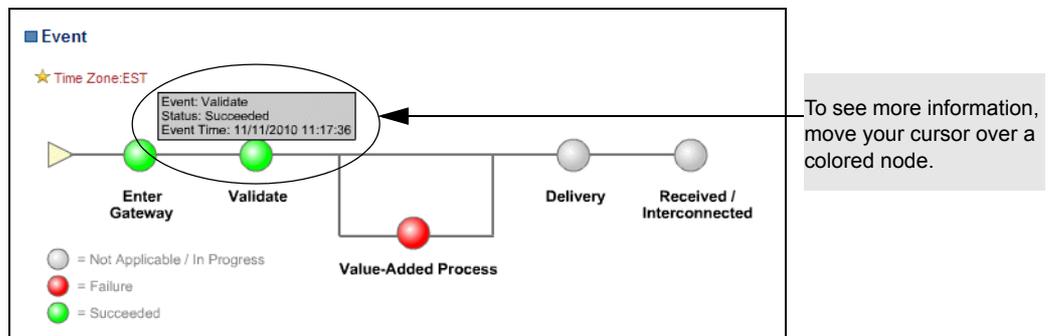
Moving your cursor over any color-coded node displays document event summary information (see “Viewing an Event Node Summary” on page 55).



See “Viewing an Event Node Summary” on page 55 and “Nodes and Label Descriptions” on page 56.

Viewing an Event Node Summary

Moving your cursor over an event node gives you the event summary for that document.



See “Nodes and Label Descriptions” on page 56.

Nodes and Label Descriptions

The following nodes and labels display on the graph:

Node/Label	Description
Enter Gateway	Document is in a GXS gateway.
Validate	Document, such as EDI or XML, are validated when they enter an FTP gateway. Note: Binary documents or XML documents sent through the Pipeline gateway are not validated.
Value Added Process	Applicable when Value Added Processing is applied to a document. For example, AS/2 connectivity link or Transformation, X400 connectivity link.
Delivery	Document is available for pick up.
Received/Interconnected	Document has been received or sent on to an interconnect.

Viewing Document Content

The Document Contents page gives you the position and layout of all document information being transmitted.

To view document content

- 1 Click the **Document Tracking** tab.
- 2 Search for documents using the Basic, Advanced, or the Quick Search.
For information about document searches, see “Searching for Documents” on page 37.
- 3 From the Document List page, click the **Document ID** for which you need to view content.
- 4 From the Document Detail page, click **View Document**.

The selected document's contents page opens with the document summary information across the top.

The screenshot shows a web interface with three main sections:

- Document Summary:** A table with two columns. The left column lists fields like Document ID (275504505), Document Status (RulesEngineError), Sender (FTP COMPANY Y89), and Outbound Gateway. The right column lists Document Type (IN), Document Date (101111 1117), Receiver (WY REBRANDING), and Inbound Gateway (FTP).
- Document Content:** A large text area displaying EDI data in a color-coded format. Callouts point to this section, labeling it as "Color-coded document segments".
- Legend:** A table at the bottom explaining the color-coding used in the document content. Callouts point to this section, labeling it as "Segment color-coding legend".

Buttons at the top include "View Detail", "Export", and "Reprocess".

Document segments display on separate lines, using color and italics. A legend lists the meaning of each color.

Important: If an EDI document is over 32K, only a portion of the document is shown. To view the entire document, download the document to your hard drive (see “Exporting Documents to Your Hard Drive” on page 57).

Exporting Documents to Your Hard Drive

To download document information you must export the document to your hard drive.

To export a document to your hard drive

- 1 Click the **Document Tracking** tab.
- 2 Search for documents using the Basic, Advanced, or the Quick Search.
For information about document searches, see “Searching for Documents” on page 37.
- 3 From the Document List page, click the **Document ID** with the content you need to download.
- 4 From the Document Detail page or the View Document Detail page, click **Export**.
The File Download dialog box opens.
- 5 Select **Save this file to disk**, and click **OK**.

The Save As dialog box opens.

- 6 Verify or type the file name.
- 7 Navigate to the directory or folder to download the file, click **Save**.

Printing Documents

To print a document

- 1 Download the information to your hard drive (see “Exporting Documents to Your Hard Drive” on page 57).
- 2 Print using your default printer.

Resending and Reprocessing Documents

If a document fails to reach your trading partner, you must:

- Determine why it failed
- Either Resend or Reprocess the document

Resend—If the document failed because of a transmission error (Comm-Errors), click **Resend** and send it back across the network (see “Resending an Outbound Document” on page 58) or “Resending Documents Received in a Session” on page 59.

Reprocess—If the document failed because of process errors, you must correct the document and put it back in the queue for reprocessing (see “Reprocessing Documents” on page 60).

Do this:	For Outbound Documents with...	For Inbound Documents with...
Resend	Comm-Errors	Received
Reprocess	Validation Errors Syntax Errors Rules Engine Errors Duplicate Errors Processing Errors Redirected	

Important: EDI Internet customers only. If you want to retrieve documents in situations where your AS2 connectivity is unavailable, call the GXS Solution Center at +1 877.446.6847 and request a backup FTP connection for your account. You will be able to use FTP commands to retrieve any documents trading partners send to you during an outage.

If documents remain in the mailbox after your AS2 connectivity is restored, use Resend in Document Tracking to retrieve the documents. New documents will be routed to AS2.

Resending an Outbound Document

For an Outbound document with a Comm-Error status, send the document back through Inoivisworks to your Trading Partner.

Note: To resend several documents at the same time, see “Selecting Multiple Interchanges” on page 61.

To resend documents

- 1 Click the **Document Tracking** tab.
- 2 Search for documents using the Basic, Advanced, or the Quick Search.
For information about document searches, see “Searching for Documents” on page 37.
- 3 From the Document List page, click the failed document’s ID.
- 4 From the Document Detail page, click **Resend**.
A message asks for resend confirmation.
- 5 Click **Continue**.
A check mark under the **Result** field shows the document was resent.
- 6 Click **Done** and the Document List page opens.

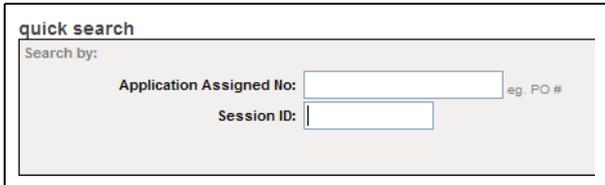
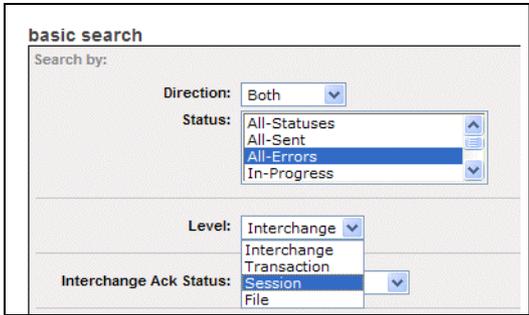
Resending Documents Received in a Session

You can resend documents received in an FTP or pipeline session.

Note: The FTP session ID displays when you are logged in to the FTP server. If logging is enabled on your FTP client, the session ID is listed in FTP logs. For pipeline sessions, the session ID is listed in pipeline logs.

To resend documents received in a session

- 1 Click the **Document Tracking** tab.
- 2 Using a Quick or Basic Search, select your search criteria.
- 3 Perform the appropriate action:

If you are performing a...	Do this:
Quick Search	<p>■ Type the Session ID.</p>  <p>A list of documents displays.</p>
Basic Search	<ol style="list-style-type: none"> 4 From the Status drop-down list, select Available. 5 From the Level drop-down list, select Session.  <ol style="list-style-type: none"> 6 Click Session ID to view the documents in the session.

- 7 Click **Quick Search** or **Basic Search**.
The Document List page displays the results of your search.

8 Select one or more sessions.

9 Click **Resend Session(s)**.

A message indicates documents were resent.

Note: The document will have an event that indicates it was resent.

Reprocessing Documents

After correcting the errors that caused your document to fail processing, reprocess a document by placing it back in the queue.

Note: To reprocess several documents at the same time, see “Selecting Multiple Interchanges” on page 61.

To place a document back in the queue for reprocessing

1 Click the **Document Tracking** tab.

2 Search for documents with the status All Errors and Redirected using the Basic, Advanced, or the Quick Search.

For information about document searches, see “Searching for Documents” on page 37.

3 From the Document List page, click the **Document ID** of the failed document needing reprocessing.

4 Make all corrections, and click **Reprocess**.

A message asks you to confirm reprocessing.

5 Click **Continue**.

A check mark under the **Result** field shows the document is in the queue.

6 Click **Done** and the Document List page opens.

Note: You can place more than one document in the queue at one time (see “Selecting Multiple Interchanges” on page 61).

Placing a Document on Hold

To prevent a Trading Partner from receiving a document you’ve sent, put the document on Hold. This makes the document unavailable.

To place a document on **Hold** the document must be **Available**. In addition, both the sender and receiver of the document must use Inoivisworks.

Note: A document rule can also put a document on hold.

To put a document on hold

1 Click the **Document Tracking** tab.

2 Search for documents using the Basic, Advanced, or the Quick Search.

For information about document searches, see “Searching for Documents” on page 37.

3 From the Document List page, select the Document ID of the Available document you need to place on Hold.

4 On the View Detail page, click **Hold**.

A message requests the status change confirmation.

5 Click **Continue**.

A check mark under the Result field shows the document is on hold.

- 6 Click **Done** and the Document List page opens.

Taking a Document off Hold

Note: To remove the Hold status on several documents at the same time, see “Placing a Document on Hold” on page 60.

To take a document off hold

- 1 Click the **Document Tracking** tab.
- 2 Search for documents using the Basic, Advanced, or the Quick Search.
For information about document searches, see “Searching for Documents” on page 37.
- 3 From the Document List page, click the **Document ID** of the Hold document you need.
- 4 On the View Detail page, click **Unhold**.
A message requests the status change confirmation.
- 5 Click **Continue**.
A check mark under the **Result** field shows the document is no longer on **Hold**.
- 6 Click **Done** and the Document List page opens.
The document is **Available**.

Selecting Multiple Interchanges

More than one Outbound document can be sent at one time by selecting multiple interchanges.

To select multiple interchanges

- 1 Click the **Document Tracking** tab, and search for documents using the Basic or Advanced Search.
For information about document searches, see “Searching for Documents” on page 37.
- 2 Select the status you need based on what you need to do with the documents:

To do this with multiple documents:	Select this status
Resend	<ul style="list-style-type: none"> ■ Comm-Error
Reprocess	<ul style="list-style-type: none"> ■ Validation Error ■ Data Syntax Error ■ Rules Engine Error ■ Duplicate Error ■ Processing Error ■ Redirected
Place them on Hold	<ul style="list-style-type: none"> ■ Available
Remove the Hold status	<ul style="list-style-type: none"> ■ Hold

- 3 From the Level drop-down list, select **Interchange**.
- 4 Type or select any other criteria.
- 5 Click **Basic Search** or **Advanced Search**.

The Document List page opens with the documents you can Resend, Reprocess, put on or take off Hold.

- 6 Click your selection.

If you want to...	Select:
Select specific documents	The needed check boxes.
Send all documents listed	<p>Check All.</p> <p>Note: If only one status is selected on the Document Summary page (for example, Resend, Reprocess, Hold, Unhold), all documents can be selected or cleared by selecting the checkbox in the column head.</p>

- 7 Click **Resend, Reprocess, Hold, or Unhold**.

A confirmation message opens.

- 8 Verify your action and click **Continue**.

A check mark in the Result column shows the documents were Resent, Reprocessed, put on or removed from Hold.

- 9 Click **Done** and the Document List page opens.

Monitoring Detailed TGO Message Information

If your company uses Inovisworks and GXS Trading Grid[®] Online (TGO), you can view detailed TGO messages from the Transaction Detail page. Inovisworks displays the messages only if TGO finds validation issues with a document and Inovisworks receives Warning events from TGO.

To view detailed information about TGO messages

- 1 Click the **Document Tracking** tab.
- 2 Search for documents (see “Searching for Documents” on page 37).
- 3 Click **Basic Search**.

The Document List page opens, displaying the results of the search.

Locate the transaction you want to view.

- 4 Click the Document ID.

The View Detail page opens. In the Transaction Sets table, the last columns show TGO messages.

If your company *sent* the document, Inovisworks displays messages in the Sender Integration Messages column. If your company *received* the document, Inovisworks displays messages in the Receiver Integration Messages column.

The last columns show up to 128 characters of a TGO message.

Transaction Sets												
Set ID	Control Number	Group Control Number	Group Type	App. Assigned No.	Ack Status	# of Associated Transactions (Sender)	Sender TLM Status	# of Associated Transactions (Receiver)	Receiver TLM Status	Details	Error Messages	Sender Integration Message
850	000000107	15	PO	000000013	Not Expected	0	Expecting Match	0	N/A	474001		AI Validation error: Field contains the invalid code 'CATALYSTWEB';

Click to view the complete text of a TGO message.

- To view Transaction Details, including complete text of a TGO message, locate the Details column and click the **ID**.

The Transaction Details page opens.

Transaction Details	
Transaction ID	474001
Interchange Sender ID/Qualifier	CATALYSTWEB/01
Interchange Receiver ID/Qualifier	WEBFORMS/01
Interchange Control Number	000000021
Group Type	PO
Group Control Number	15
Group Sender ID/Qualifier	CATALYSTWEB
Group Receiver ID/Qualifier	WEBFORMS
Group Version/Industry	004010
Group Time	
Transaction Type	850
Transaction Control Number	000000107
Transaction Reference Value	000000013
Sender Integration Messages	AI Validation error: Field contains the invalid code 'CATALYSTWEB';

Displays up to 4000 characters of a TGO message.

Tracking Functional Acknowledgements

The information in this topic is relevant only if your company subscribes to the Functional Acknowledgement (FA) reconciliation service.

- “About Acknowledgement Processing and Status” on page 64
- “Searching for Original Documents or Acknowledgements by Status” on page 66
- “Viewing Acknowledgement Status in Document Details” on page 67
- “Viewing Original Documents for which Acknowledgements are Expected” on page 68
- “Viewing Transaction Details of Accepted Original Documents” on page 69

- “Viewing Transaction Details of Acknowledgements with Errors” on page 70
- “Manually Acknowledging Original Documents” on page 71
- “Changing Deadlines Created by an Acknowledgement Monitor” on page 72

About Acknowledgement Processing and Status

FA Reconciliation is the process of verifying that original documents your company sends were received by your trading partners. For set up information, see “Acknowledgement Reconciliation” on page 183.

- “Timeouts and Acknowledgement Status” on page 64
- “Processing Flow and Acknowledgement Status” on page 64

Timeouts and Acknowledgement Status

Timeouts are time intervals defined by your company. The time intervals specify periods in which you expect to receive acknowledgements from trading partners. A typical timeout setting is 30 minutes.

Inovisworks activates timeouts when it processes your original documents and sets the original document’s acknowledgement status to Expected. The original document’s status changes during processing.

EXAMPLE

You want FAs not received 6 minutes after the time the original document was sent to generate a Warning timeout. You want FAs not received 15 minutes after the time the original document was sent to generate a Violation timeout.

If the FA is...	The original document’s acknowledgement status changes from Expected to...
Not received within 6 minutes	Warning
Not received within 15 minutes	Violation
Received at any time	<ul style="list-style-type: none"> ■ Received ■ Accepted ■ Rejected ■ Accepted w Errors

See “Processing Flow and Acknowledgement Status” on page 64, “Transaction Acknowledgement Status” on page 65, and “Interchange Acknowledgement Status” on page 66.

Processing Flow and Acknowledgement Status

Acknowledgement statuses are different for original documents (sent to trading partners) and return documents (FAs received from trading partners).

- “Original Documents Sent to Trading Partners” on page 65
- “FAs Received from Trading Partners” on page 65
- “Transaction Acknowledgement Status” on page 65
- “Interchange Acknowledgement Status” on page 66

ORIGINAL DOCUMENTS SENT TO TRADING PARTNERS

The table outlines the processing flow when you send original documents to trading partners. The table shows how the statuses change during processing,

Original document & interchange acknowledgement status during processing	Status before FA received	Status when FA received
Not Set	Expected	<ul style="list-style-type: none"> ■ Accepted ■ Accepted w Errors ■ Rejected ■ Reconcile Error
	Not Expected	Not Expected

See “Transaction Acknowledgement Status” on page 65 and “Interchange Acknowledgement Status” on page 66.

FAS RECEIVED FROM TRADING PARTNERS

The table outlines the processing flow when you receive FAs from trading partners. The table shows how the statuses change during processing.

FA & interchange acknowledgement status during processing	FA & interchange acknowledgement after reconciliation
Not Set	Matched
	Not Matched

See “Transaction Acknowledgement Status” on page 65 and “Interchange Acknowledgement Status” on page 66).

TRANSACTION ACKNOWLEDGEMENT STATUS

These acknowledgement statuses are applied to individual transactions.

Transaction Acknowledgement Status	Description
Original Document	
■ N/A	FA reconciliation is disabled.
■ Not Set	FA reconciliation is still processing for the original document or errored before the status was set.
■ Not Expected	Transaction is not monitored.
■ Expected	Transaction is monitored. Acknowledgement is expected, but has not been received.
■ Received	Acknowledgement received for transaction, but transaction has not been accepted or rejected (EDIFACT only).
■ Accepted	Accept acknowledgement was received.
■ Accepted w Errors	Accept with errors acknowledgement was received.
■ Warning	A warning timeout occurred.
■ Violation	A violation timeout occurred.
■ Rejected	Reject acknowledgement was received.
FA	
■ N/A	FA reconciliation is disabled or the original transaction this FA reconciles is not monitored.

Transaction Acknowledgement Status	Description
■ Not Set	Reconciliation is processing or errored before a status was set.
■ Matched	All monitored acknowledgements in the transaction were matched.
■ Not Matched	Reconciliation could not match at least one monitored acknowledgement in the FA transaction.
■ Reconcile Error	Error occurred during reconciliation.

INTERCHANGE ACKNOWLEDGEMENT STATUS

These acknowledgement statuses are calculated based on all transactions in the interchange.

Interchange Acknowledgement Status	Description
Original Document	
■ N/A	FA reconciliation is disabled.
■ Not Set	FA reconciliation is still processing for the original document or processing has been interrupted.
■ Not Expected	Transactions in this interchange are not configured for FA reconciliation.
■ Expected	Acknowledgements for all monitored transactions are expected.
■ Received	Confirmation has been received for all transactions in the interchange, but the interchange has not been accepted or rejected (EDIFACT only).
■ Accepted	All transactions in the interchange were accepted
■ Accepted w Errors	Some transactions in the interchange were accepted with errors.
■ Warning	Some transaction in the interchange reached a <i>warning</i> timeout.
■ Violation	Some transactions in the interchange reached a <i>violation</i> timeout.
■ Rejected	At least one transaction in the interchange was rejected.
FA	
■ N/A	FA reconciliation is disabled, or none of the original documents acknowledged in this interchange are configured for FA reconciliation.
■ Not Set	Reconciliation is still processing or processing was interrupted.
■ Matched	All acknowledgements in this interchange were matched to the original document.
■ Not Matched	At least one acknowledgement was not matched to the original document.
■ Reconcile Error	Error occurred during processing.

Searching for Original Documents or Acknowledgements by Status

To search for original documents or FAs by acknowledgement status

- I Click the **Document Tracking** tab.

- In the Level drop-down list, select **Interchange** or **Transaction**. Either leave Interchange/Transaction Ack Status blank (all acknowledgement statuses) or select a status.

- Blank—All statuses
- All Errors—Warning, Violation, Rejected, Reconciliation Error, Not Matched
- Not Set—FA reconciliation still processing for original document. Might be errors.

- Select a date range and other selection criteria.
- Click **Basic Search**.

The Document Tracking page opens with the results of the search (see “Using the Document List” on page 49).

Viewing Acknowledgement Status in Document Details

To view FA processing status for original documents and FAs

- Click the **Document Tracking** tab.
- In the Level drop-down list, select **Interchange** or **Transaction**. In Interchange/Transaction Ack Status, select blank (all statuses).
- Select a date range and other selection criteria.
- Click **Basic Search**.

The Document Tracking page opens with the results of the search.

Document ID	Doc Type	Status	App. Assigned No.	Control Number	Group Control Number	Sender	Receiver	Processed Time	ICII	OutBound Gateway	Ack Status	Details
245803256	PO - 850	Received		16938	16938	412901369/ZZ	412901369/ZZ	05/02/2006 13:51:31	000016938	FTP	Expected	7130621
245803234	PO - 846	Received		16937	16937	412901369/ZZ	412901369/ZZ	05/02/2006 13:51:31	000016937	FTP	Expected	7130620
245803254	OR - 816	Received		16930	16930	412901369/ZZ	412901369/ZZ	05/02/2006 13:51:28	000016930	FTP	Expected	7130613

Click to view document details.

- Click **Document ID**.

The View Details page opens.

Detail

- Document ID 247498972
- Document Type TA3
- Document Status Available
- Document Date 060511 1813
- Sender SUPERMAN (KALEL/ZZ)
- Receiver OMNI2 TEST (OMNI2/ZZ)
- Standard EDI_X12
- Version
- Character Count 278
- Inbound Gateway FTP
- Outbound Gateway PIPELINE
- Acknowledgement Status Not Expected

EDI Detail

- Int Ctrl No. 000017237
- Interchange Date 060511 1813
- Number of Transaction sets 2

Transaction Sets						
Set ID	Control Number	Group Control Number	Group Type	App. Assigned No.	Ack Status	Details
TA3	KALEL	KALEL	TA3	000	Not Set	8309277
TA3	KALEL	KALEL	TA3	010	Not Set	8309278

Status of FA reconciliation processing. Not Set means reconciliation is still processing (see "Processing Flow and Acknowledgement Status" on page 64).

Viewing Original Documents for which Acknowledgements are Expected

To view original documents for which acknowledgements are expected

- 1 Click the **Document Tracking** tab.
- 2 In the Level drop-down list, select **Transaction**. In Transaction Ack Status, select **Expected**.
- 3 Select a date range and other selection criteria > Click **Basic Search**.

A list of original documents for which FAs are expected display.

Document ID	Doc Type	Status	App. Assigned No.	Control Number	Group Control Number	Sender	Receiver	Processed Time <input type="checkbox"/>	ICN	OutBound Gateway	Ack Status	Details
245803256	PO - 850	Received		16938	16938	412901369/ZZ	412901369/ZZ	05/02/2006 13:51:31	000016938	FTP	Expected	7130621
245803234	IB - 846	Received		16937	16937	412901369/ZZ	412901369/ZZ	05/02/2006 13:51:31	000016937	FTP	Expected	7130620
245803254	OR - 816	Received		16930	16930	412901369/ZZ	412901369/ZZ	05/02/2006 13:51:28	000016930	FTP	Expected	7130613

Click to view transaction details.

- 4 Click the transaction details link.

Acknowledgement status information displays.

Detail

- Interchange Sender ID/Qualifier LYLEFTP/ZZ
- Interchange Receiver ID/Qualifier LYLEFTP2/ZZ
- Interchange Control Number 000000627
- Group Type SS
- Group Control Number 000048790
- Group Sender ID/Qualifier LYLEFTP
- Group Receiver ID/Qualifier LYLEFTP2
- Group Version/Industry 002002
- Group Time
- Transaction Type 862
- Transaction Control Number 0001
- Transaction Reference Value 021380000756
- Transaction ID 8308878

Acknowledgements

- Acknowledgement Status Expected
- Ack Reconcile Config Test All Types for LYLEFTP (1032)
- Timeout Date Warning on Thu May 11 15:28:38 EDT 2006, Violation on Thu May 11 15:36:08 EDT 2006

Received Acknowledgement

Transaction ID	Ack Level	Ack Code	Ack Status	Ack Message	Ack Reconcile Config

- Current acknowledgement status
- Your FA reconciliation configuration that activated reconciliation of original document
- Date timeout is to occur

When received, acknowledgement information displays in this area.

Note: You can access the same information from the Document List page. Click **Document ID**. Under Transaction Sets, click the transaction details link.

Viewing Transaction Details of Accepted Original Documents

To view transaction details of accepted original documents

- 1 Click the **Document Tracking** tab.
- 2 In the Level drop-down list, select **Transaction**. In Transaction Ack Status, select **Accepted**.
- 3 Select a date range and other selection criteria > Click **Basic Search**.

A list of all original documents that have been accepted display.

Document ID	Doc Type	Status	App. Assigned No.	Control Number	Group Control Number	Sender	Receiver	Processed Time	ICLI	OutBound Gateway	Ack Status	Details
247497889	IM - 210	Received		499	499	JICN/ZZ	KALEL/ZZ	05/10/2006 11:16:08	000000499	F*P	Accepted	83088303
247497958	IM - 210	Received		482	482	JICN/ZZ	KALEL/ZZ	05/10/2006 11:10:01	000000482	F*P	Accepted	83088301

Click to view transaction details.

- 4 Click the transaction details link.

Transaction details for the original documents display.

Detail

- Interchange Sender ID/Qualifier JCN/ZZ
- Interchange Receiver ID/Qualifier KALEL/ZZ
- Interchange Control Number 00000482
- Group Type IM
- Group Control Number 482
- Group Sender ID/Qualifier JCN
- Group Receiver ID/Qualifier KALEL
- Group Version/Industry 004010
- Group Time
- Transaction Type 210
- Transaction Control Number 482
- Transaction Reference Value
- Transaction ID 8308801

Acknowledgements

- Acknowledgement Status Accepted
- Ack Reconcile Config All X12s (1090)
- Timeout Date

Received Acknowledgement

Transaction ID	Ack Level	Ack Code	Ack Status	Ack Message	Ack Reconcile Config
8308802	TR	A	Accepted		All X12s (1090)

Shows an FA was accepted for the original document.

Click to see the FA that acknowledged this transaction.

Note: You can access the same information from the Document List page. Click **Document ID**. Under Transaction Sets, click the transaction details link.

Viewing Transaction Details of Acknowledgements with Errors

To view transaction details of acknowledgements with errors

- 1 Click the **Document Tracking** tab.
- 2 In the Level drop-down list, select **Transaction**. In Transaction Ack Status, select **All Errors**.
- 3 Select a date range and other selection criteria > Click **Basic Search**.

A list of all FAs with an error status display.

Document ID	Doc Type	Status	App. Assigned No.	Control Number	Group Control Number	Sender	Receiver	Processed Time	ICII	OutBound Gateway	Ack Status	Details
245803438	FA - 997	Received		16972	16972	412901385/ZZ	KALEL/ZZ	05/02/2006 15:36:33	000016972	FTP	Not Matched	7130802
245803485	FA - 997	Received		16972	16972	412901385/ZZ	KALEL/ZZ	05/02/2006 15:36:32	000016972	FTP	Reconcile Error	7130801
245803461	FA - 997	Received		16981	16981	412901385/ZZ	KALEL/ZZ	05/02/2006 15:09:59	000016981	FTP	Not Matched	7130800

Click to view transaction details.

- 4 Click the transaction details link.

Transaction details for the FA and a list of monitored original documents display.

■ Detail

- Interchange Sender ID/Qualifier 412901365/ZZ
- Interchange Receiver ID/Qualifier KALEL/ZZ
- Interchange Control Number 000016972
- Group Type FA
- Group Control Number 16972
- Transaction Type 997
- Transaction Control Number 16972
- Transaction ID 7130801

Monitored Original Documents								
Transaction ID	Transaction Type	Control Number	Application #	Ack Level	Ack Code	Ack Status	Ack Message	Ack Reconcile Config
						Reconcile Error	Multiple functional groups/transactions found that match what 997 is targeting.	ALL X12s (1029)
						Reconcile Error	Multiple functional groups/transactions found that match what 997 is targeting.	ALL X12s (1029)

For the original document, shows:

- Acknowledgement status and error message
- FA reconciliation configuration.

Note: You can access the same information from the Document List page. Click **Document ID**. Under Transaction Sets, click the transaction details link.

Manually Acknowledging Original Documents

If you speak with trading partners and confirm they received the original documents you sent, you can manually acknowledge the original documents.

Note: If your FA reconciliation settings were updated, you might need to manually acknowledge some original documents.

To manually acknowledge original documents

- 1 Click the **Document Tracking** tab.
- 2 In the Level drop-down list, select **Transaction**. In Transaction Ack Status, select blank (all statuses).
- 3 Select a date range and other selection criteria > click **Basic Search**.

A list of documents display.

Document ID	Doc Type	Status	App. Assigned No.	Contrl Number	Group Control Number	Sender	Receiver	Processed Time	ICHI	OutBound Gateway	Ack Status	Details
245803256	PO - 850	Received		16938	16938	412901369/ZZ	412901369/ZZ	05/02/2006 13:51:31	000016938	FTP	Expected	7130621
245803234	IB - 846	Received		16937	16937	412901369/ZZ	412901369/ZZ	05/02/2006 13:51:31	000016937	FTP	Expected	7130620
245803254	OR - 816	Received		16930	16930	412901369/ZZ	412901369/ZZ	05/02/2006 13:51:28	000016930	FTP	Expected	7130613

Click to view transaction details.

- 4 Click **Manually Acknowledge**.

View Events

View Document View Document in HEX Export Resend Hold

■ Detail

- Transaction ID 24651886
- Interchange Sender ID/Qualifier SLMLOAD37/ZZ
- Interchange Receiver ID/Qualifier SLMLOAD200/ZZ
- Interchange Control Number 000092844
- Group Type IN
- Group Control Number 92844
- Group Sender ID/Qualifier SLMLOAD37
- Group Receiver ID/Qualifier SLMLOAD200

- Indicate if the acknowledgement was Accepted or Rejected, and describe why you are manually acknowledging the original transaction.

- Click **Submit**.

The original document's acknowledgement status changes to Accepted or Rejected.

Transaction ID	Ack Level	Ack Code	Ack Status	Ack Message	Response Period	Ack Reconcile Config
			Accepted	Manually Acknowledge		850 - 997 (1914)

After being manually acknowledged, the original document's acknowledgement status changes from Expected to Accepted or Rejected.

Changing Deadlines Created by an Acknowledgement Monitor

You can manually change deadlines that are created by an FA monitor configuration. After changing an FA deadline, Inovisworks removes the existing timeouts and updates the FA status for the monitor to Incomplete.

To change timeout settings created by an FA monitor

- Click the **Document Tracking** tab.
- In the Basic Search area, select values and perform a document search either at the interchange or transaction level > click **Basic Search**.
- Perform the appropriate action:

If you search at this level...	Do this...
Interchange	<ol style="list-style-type: none"> Locate the document you want to view. Click the Document ID. In the Details column in the EDI Detail area on the View Detail page, click the link.
Transaction	<ol style="list-style-type: none"> Locate the document you want to view. In the Details column on the Document List page, click the link.

The Transaction Details page opens.

- 9 At the top of the page, click **Change FA Deadline**.



Click to manually change the deadline for an FA monitor configuration.

The Change FA Deadlines page opens.

A screenshot of the "Change FA Deadlines" form. It contains three main sections: "Timeout Type" with a dropdown menu set to "Warning"; "Timeout Date/Time" with a "Date" input field (placeholder "mm/dd/yyyy") and a "Time" dropdown menu set to "00:00:00 AM"; and "Comments" with a large text area.

- 10 Type or select the:
- Timeout Type—Warning or Violation.
 - Timeout Date/Time—Date and time for the new deadline.
 - Comments—Type comments about why the deadline is being changed.
- 11 Click **Submit** to create the new timeout deadline.

Reports Tab

4

At the end of each billing cycle, Inovisworks generates standard reports. The reports include:

Report Name	Description
Billing Usage Report	Shows network activity for a specific month and year based on document and character counts (see “Billing Usage Report” on page 76).
Document Summary Report	Lists document totals for a defined time period (see “Document Summary Report” on page 78).
Interchange Usage Report	Summarizes the traffic sent and received between an account (PSN) and interconnecting networks during the previous month (see “Interconnect Usage Report” on page 87).
Managed Services Reports	Lists three real-time reports including: <ul style="list-style-type: none">■ Document History■ Trading partner History■ Transaction Summary (see “Managed Services Reports” on page 88)
Trading Partner Report	Lists Trading Partners at either the Interchange level or Transaction level (see “Trading Partner Report” on page 97).

You can generate additional reports as needed or on a regular basis:

Report	Description
FTP Interactive Audit Report	Provides synchronous audit feedback during or after an FTP session (see “FTP Interactive Audit Report” on page 79).
FTP On-Demand Report	Lists document totals for a defined time period (see “FTP On-Demand Report” on page 84).
Payer Beneficiary Reports	<ul style="list-style-type: none">■ List Report—Lists all beneficiaries of a payer beneficiary relationship.■ Usage Report—Provides usage information for payer beneficiary relationships. See “Payer Beneficiary Reports” on page 90.
Recurring Reports	<ul style="list-style-type: none">■ Document Summary—Regular report that lists documents processed in time period.■ Trading Partner—Regular report that lists trading partners for all or selected accounts. See “Recurring Reports” on page 92.

Billing Usage Report

The Billing Usage Report shows network activity for a specific month and year. It summarizes the usage by:

- Document Count—the number of documents sent through Inovisworks during peak and off peak hours.
- Character Count—the number of document characters sent through Inovisworks during peak and off-peak hours.
- GXS Peak Usage Hours:
Monday through Friday, 6 a.m.—8 p.m. Eastern Standard Time (EST).

Created as a comma-separated value file (.csv), the report will open in any application that reads .csv files; for example, Microsoft Excel.

- “Viewing a Billing Usage Report” on page 76
- “Billing Usage Report Description” on page 77
- “Downloading a Billing Usage Report” on page 77

Viewing a Billing Usage Report

To view a Billing Usage Report

- 1 Click the **Reports** tab > **Billing Usage Report**.
- 2 From the drop-down lists, select the Month and Year you want to view.
- 3 Click **Go**.

The Billing Usage Report opens matching your selection criteria.

Start Month: Sep 2010 End Month: Sep 2010

Customer Document Total: 976
Customer Character Total: 54500

Sep 2010

Account (PSN)	Document Counts								Character Counts										
	Peak Time				Off-Peak Time				Total	Peak Time				Off-Peak Time				Total	
	Sent	Received	Exported	Initiated	Sent	Received	Exported	Initiated		Sent	Received	Exported	Initiated	Sent	Received	Exported	Initiated		
412910730	0	0	0	0	976	0	0	0	976	0	0	0	0	54500	0	0	0	54500	
Total									976	Total									54500

Click a link to see detailed report information.

- 4 To view detailed report information, click a link under the Total columns.

Detailed information for the report period displays.

Account (PSII): 412901391	Usage Date: Aug 2007
Sent Units: 44	Sent Characters: 94400
Received Units: 0	Received Characters: 0
Exported Units: 0	Exported Characters: 0
Initiated Units: 0	Initiated Characters: 0
Total: 44	Total: 94400
Free Units: 0	Free Units: 0
Adjusted Total: 44	

[Download CSV File](#)

Sent Documents				
Document ID	Receiver Account (PSII)	Receiver Company Name	Sent Date	Document Size
266104563	412906689	DTSQUEUE CUSTOMER2	08/12/2007 10:50:27	28300
266104601	412906689	DTSQUEUE CUSTOMER2	08/12/2007 10:50:41	28300
266105744	412908453	CONSOLIDATED OVERAGE CALC	08/14/2007 10:35:32	900
266105765	412908453	CONSOLIDATED OVERAGE CALC	08/14/2007 10:35:33	900
266105722	412908453	CONSOLIDATED OVERAGE CALC	08/14/2007 10:35:44	900
266105777	412908453	CONSOLIDATED OVERAGE CALC	08/14/2007 10:35:47	900
266106437	412908453	CONSOLIDATED OVERAGE CALC	08/18/2007 08:44:39	900
266106461	412908453	CONSOLIDATED OVERAGE CALC	08/18/2007 08:44:40	900
266106477	412908453	CONSOLIDATED OVERAGE CALC	08/18/2007 08:44:56	900
266106412	412908453	CONSOLIDATED OVERAGE CALC	08/18/2007 08:44:56	900

You can download report information from either the summary or detailed pages (see “Downloading a Billing Usage Report” on page 77).

Billing Usage Report Description

Report Area	Description
Document Counts	Number of documents sent, received, exported, and initiated through the network during peak and off-peak times.
Character Counts	Number of characters, based on document size, that passed through the network during peak and off-peak times.

Peak and Off-Peak Times

Peak Time	Monday through Friday, 6 a.m.—8 p.m. EST
Off Peak Time	Monday through Friday, 8 p.m.—6 a.m. EST All day Saturday and Sunday.

Downloading a Billing Usage Report

To download a Billing Usage Report

- 1 Click **Go**.
- 2 Click **Download CSV file**.
- 3 Select **Save**.
- 4 Navigate to where you want to save the file > click **Save**.

Document Summary Report

The Document Summary Report shows the total number of delivered and received documents processed within a selected time frame. Created as a comma-separated value file (.csv), the report will open in any application that reads .csv files, such as Microsoft Excel.

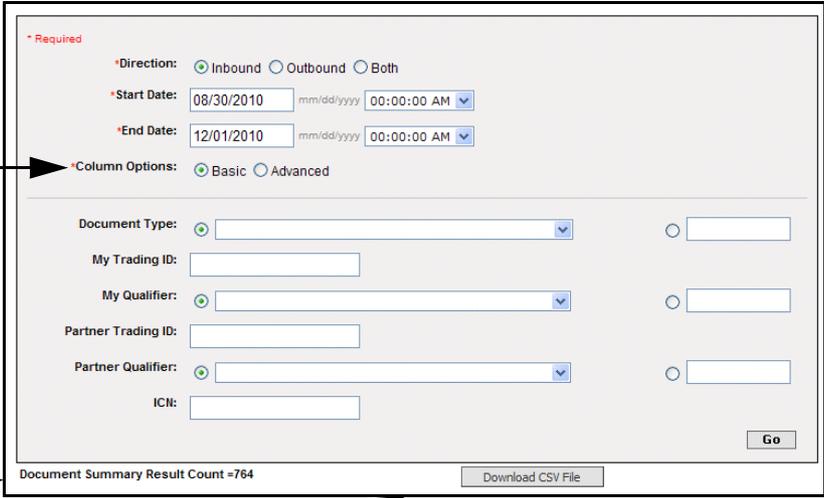
- “Viewing a Document Summary Report” on page 78
- “Document Summary Search Field Descriptions” on page 79
- “Downloading a Document Summary Report” on page 79

Viewing a Document Summary Report

To view the Document Summary Report

- 1 Click the **Reports** tab > **Document Summary**.

The Document Summary Search page opens.



The screenshot shows a search form with the following fields and options:

- * Required** (indicated by a red asterisk)
- *Direction:** Inbound Outbound Both
- *Start Date:** 08/30/2010 (mm/dd/yyyy) 00:00:00 AM
- *End Date:** 12/01/2010 (mm/dd/yyyy) 00:00:00 AM
- *Column Options:** Basic Advanced
- Document Type:** [dropdown] [dropdown]
- My Trading ID:** [text input]
- My Qualifier:** [dropdown] [dropdown]
- Partner Trading ID:** [text input]
- Partner Qualifier:** [dropdown] [dropdown]
- ICN:** [text input]
- Go** button

Annotations on the screenshot:

- An arrow points from the text "Advanced column option provides additional information in the .csv file (see “*Columns” on page 79)." to the "Advanced" radio button under "Column Options".
- An arrow points from the text "Total number of documents in the report." to the "Document Summary Result Count =764" text at the bottom of the form.
- An arrow points from the text "Click to download the report as a CSV file (see “Downloading a Document Summary Report” on page 79)." to the "Download CSV File" button at the bottom right of the form.

- 2 Type or select your summary report criteria (see “Document Summary Search Field Descriptions” on page 79).

Document Summary Search Field Descriptions

Field	Type or Select
*Direction	Whether your summary report is for: <ul style="list-style-type: none"> ■ Inbound documents ■ Outbound documents ■ Both
*Start/End Date	Date range for which you want your summary report.
*Start/End Time	Time period for which you want your summary.
*Columns	Column headings in the .csv file: <ul style="list-style-type: none"> ■ Basic—Basic column headings ■ Advanced—Basic column headings, plus sender name, receiver name, transaction count, and functional group count
Document Type or Free Text Format	Document type from the drop-down list. For example, INV—Invoice (810). If the document type is not listed, type it here.
My Trading ID	Trading ID for the account.
My Qualifier or Free Text Format	From the drop-down list, the qualifier for the account. If your qualifier is not listed, type it here.
Partner Trading ID	Trading Partner's trading ID.
Partner Qualifier or Free Text Format	From the drop-down list, the Trading Partner's qualifier. If your partner's qualifier is not listed, type it here.
ICN	For EDI documents, the Interchange Control Number at the Interchange level.

Downloading a Document Summary Report

To download a Document Summary Report

- 1 Click **Go**.
- 2 Click **Download CSV file**.
- 3 Select **Save**.
- 4 Navigate to where you want to save the file > click **Save**.

FTP Interactive Audit Report

The FTP Interactive Audit Report displays audit feedback during (or after) an FTP session. **FTP 211** system status messages provide feedback during a session. **FTP 221** service control closing connection messages provide feedback after a session is complete.

- “Generating an FTP Interactive Audit Report” on page 80
- “211 System Status Messages” on page 80
- “221 Service Closing Control Connection Messages” on page 82

Generating an FTP Interactive Audit Report

Some FTP clients might not directly support SITE commands, which means you might need to use a QUOTE or LITERAL command when sending SITE commands. Consult your FTP client documentation.

To generate an FTP Interactive Audit Report

- At the FTP command line, perform the appropriate action:

If you want to return a ...	Type...
Synchronous response for each interchange in the file during a PUT or GET	<ul style="list-style-type: none"> site report txstatus (generates the report in CSV format) or <ul style="list-style-type: none"> site report txstatus format_fixed FTP generates synchronous audit feedback on the screen (see “211 System Status Messages” on page 80).
Synchronous response for each file transfer	<ul style="list-style-type: none"> site report txstatusx (generates the report in CSV format) or <ul style="list-style-type: none"> site report txstatusx format_fixed FTP generates synchronous audit feedback on the screen (see “226 System Status Messages” on page 82).
Response after issuing the QUIT command. The response lists each interchange PUT or GET during the session.	<ul style="list-style-type: none"> site report sessionstatus (generates the report in CSV format) or <ul style="list-style-type: none"> site report sessionstatus format_fixed FTP generates audit feedback after the session is complete (see “221 Service Closing Control Connection Messages” on page 82).

211 System Status Messages

FTP 211 system status messages provide synchronous audit feedback for each interchange in a file. For example, if you send a file with five interchanges, they get a series of 211 messages, one for each interchange in the file, before getting 226 (Transfer Complete). See “Example: CSV Format (site report txstatus)” on page 81 and “Example: Fixed Format (site report txstatus)” on page 81.

Data and Format

The 211 messages display this data, which is shown in CSV format:

```
211 <DOCID> , <SENDERALIAS> , <SENDERQUAL> , <RECVLIAS> , <RECVQUAL> , <ICN> ,
<SESSIONID> , <DOCTYPE> , <SIZE> , <STATUS>
```

In fixed format, the data displays in fixed positions:

Field	Length	Position
Document ID	11	0-10
Sender Alias	35	11-45
Sender Qualifier	35	46-80
Receiver Alias	35	81-115
Receiver Qualifier	35	116-150
Interchange Control Number	30	151-180

Field	Length	Position
Session ID	11	181-191
Document Type	30	192-221
Size	11	222-232
Status	3	233-235

Example: CSV Format (site report txstatus)

This report was generated using the **site report txstatus** command.

You can use the **site report txstatus** command to generate synchronous feedback during a session. Feedback is displayed in CSV format.

Your company put a file with one document.

Your company put a file with many documents.

211 messages show the status of each document in the file (see "211 System Status Messages" on page 80).

```

230 User 412900238 logged in. Session ID 8705
ftp> site report txstatus
200 Generating report txstatus.
ftp> cd tovan/edi
250 CWD command successful.
ftp> put test.edi
200 PORT command successful.
150 Opening ASCII mode data connection.
211 36499,FOOBAR,ZZ,GOBOTT,ZZ,100008035,8705,PO,1841,OK
226 Transfer complete.
ftp: 1841 bytes sent in 0.00seconds 1841000.00Kbytes/sec.
ftp> put bigtest.edi
200 PORT command successful.
150 Opening ASCII mode data connection.
211 36500,FOOBAR,ZZ,GOBOTT,ZZ,000000000,8705,IN,4770,OK
211 36501,FOOBAR,ZZ,GOBOTT,ZZ,000000001,8705,IN,4770,OK
211 36502,FOOBAR,ZZ,GOBOTT,ZZ,000000002,8705,IN,4770,OK
211 36503,FOOBAR,ZZ,GOBOTT,ZZ,000000003,8705,IN,4770,OK
211 36504,FOOBAR,ZZ,GOBOTT,ZZ,000000004,8705,IN,4770,OK
211 36505,FOOBAR,ZZ,GOBOTT,ZZ,000000005,8705,IN,4770,OK
211 36506,FOOBAR,ZZ,GOBOTT,ZZ,000000006,8705,IN,4770,OK
211 36507,FOOBAR,ZZ,GOBOTT,ZZ,000000007,8705,IN,4770,OK
211 36508,FOOBAR,ZZ,GOBOTT,ZZ,000000008,8705,IN,4770,OK
226 Transfer complete.
ftp: 127762 bytes sent in 0.02seconds 7985.13Kbytes/sec.
ftp> bye
221 You have transferred 125860 bytes in 2 file(s).
                
```

Example: Fixed Format (site report txstatus)

This report was generated using the **site report txstatus format_fixed** command.

You can use the **site report txstatus format_fixed** command to generate synchronous feedback during a session. Feedback is displayed in fixed format.

Your company puts a file with one document.

In fixed format, 211 status messages show a document's status with fields in a fixed position (see "211 System Status Messages" on page 80).

```

230 User 412900238 logged in. Session ID 9477
ftp> cd tovan/edi
230 CWD command successful.
ftp> site report txstatus format_fixed
200 Generating report txstatus.
ftp> put test.edi
200 PORT command successful.
150 Opening ASCII mode data connection.
211 38703      FOOBAR                ZZ                100008035
TESTINC
9477      PO                1841      OK
226 Transfer complete.
ftp: 1841 bytes sent in 0.00seconds 1841000.00Kbytes/sec.
ftp> bye
221 You have transferred 1841 bytes in 1 file(s).
                
```

226 System Status Messages

FTP 226 system status messages provide synchronous audit feedback for each file transferred. See “Example: CSV Format (site report txstatusx)” on page 82.

Example: CSV Format (site report txstatusx)

This report was generated using the `site report txstatusx` command.

You can use the `site report txstatusx` command to generate synchronous feedback during a session. Feedback is displayed in CSV format.

226 messages show the completion of each file transfer.

```
STOR 28515
150 Opening ASCII mode data connection.
226-BEGIN UPLOAD REPORT
281678498,CHCKPTFTP11,ZZ,CHCKPTFTP11,ZZ,000061188,173132769,PO,840,OK
281678499,CHCKPTFTP11,ZZ,CHCKPTFTP11,ZZ,000061189,173132769,PO,840,OK
END UPLOAD REPORT
226 Transfer complete.
```

Example: Fixed Format (site report txstatusx)

This report was generated using the `site report txstatusx format_fixed` command.

You can use the `site report txstatusx` command to generate synchronous feedback during a session. Feedback is displayed in fixed format.

226 messages show the completion of each file transfer.

```
230 User 419898989 logged in. Session ID 181053892
ftp> cd tovan
250 CWD command successful.
ftp> quote site report txstatusx format_fixed
200 Generating report txstatusx.
ftp> put test997.edi
200 PORT command successful.
150 Opening ASCII mode data connection.
226-BEGIN UPLOAD REPORT
286831360 MATTP
INOUISOTFMORMPT
0009 181053892 FA ZZ ZZ 245 00000
OK
END UPLOAD REPORT
226 Transfer complete.
ftp: 245 bytes sent in 0.00Seconds 245000.00Kbytes/sec.
ftp> put combined.edi
200 PORT command successful.
150 Opening ASCII mode data connection.
226-BEGIN UPLOAD REPORT
286831479 MATTP
OIFMASVNC
1064 181053892 IN ZZ ZZ 293 11000
OK
300026 UNKNOWN 242497 null
ERR
5 Parse Error: Reason=Unrecognizable EDI
END UPLOAD REPORT
226 Transfer complete.
ftp: 2594 bytes sent in 0.03Seconds 86.47Kbytes/sec.
ftp> _
```

221 Service Closing Control Connection Messages

Used with the `site report sessionstatus` command, FTP 221 service closing control connection messages are issued after an FTP session is complete for all documents sent during a session. The pipe (|) symbol separates the documents.

- “Data and Format” on page 82
- “Example: CSV Format (site report sessionstatus)” on page 83
- “Example: Fixed Format (site report sessionstatus)” on page 84

Data and Format

The 221 messages display this data, which is shown in CSV format:

221 You have transferred 3682 bytes in <x> file(s):
<DOCID>, <SENDERALIAS>, <SENDERQUAL>, <RECVALIAS>, <RECVQUAL>, <ICN>,
<SESSIONID>, <DOCTYPE>, <SIZE>, <STATUS>

In fixed format, the data displays in fixed positions:

Field	Length	Position
Document ID	11	0-10
Sender Alias	35	11-45
Sender Qualifier	35	46-80
Receiver Alias	35	81-115
Receiver Qualifier	35	116-150
Interchange Control Number	30	151-180
Session ID	11	181-191
Document Type	30	192-221
Size	11	222-232
Status	3	233-235

Example: CSV Format (site report sessionstatus)

This report was generated using the `site report sessionstatus` command.

The `site report sessionstatus` command generates feedback after a session is complete. Feedback is displayed in CSV format.

```

230 User 412900238 logged in. Session ID 8706
ftp>| site report sessionstatus
200 Generating report sessionstatus.
ftp> cd tovan/edi
250 CWD command successful.
ftp> put test.edi
200 PORT command successful.
150 Opening ASCII mode data connection.
226 Transfer complete.
ftp: 1841 bytes sent in 0.00seconds 1841000.00kbytes/sec.
ftp> put test2.edi
200 PORT command successful.
150 Opening ASCII mode data connection.
226 Transfer complete.
ftp: 1841 bytes sent in 0.00seconds 1841000.00kbytes/sec.
ftp> bye
221 You have transferred 3682 bytes in 2 file(s): 36526,FOOBAR,ZZ,GOBOTT,ZZ,100
008035,8706,PO,1841,OK|36527,FOOBAR,ZZ,GOBOTT,ZZ,100008035,8706,PO,1841,OK|
    
```

A file is put with one document.

A file is put with one document.

221 messages show information about documents sent during a session (see "221 Service Closing Control Connection Messages" on page 82).

The pipe (|) symbol separates documents.

Example: Fixed Format (site report sessionstatus)

This report was generated using the `site report sessionstatus format_fixed` command.

The `site report sessionstatus format_fixed` command generates feedback after a session is complete. Feedback is displayed in fixed format.

```

230 User 412900238 logged in. Session ID 9478
ftp> cd tovan/edi
250 CWD command successful.
ftp> site report sessionstatus format_fixed
200 Generating report sessionstatus.
ftp> put test.edi
200 PORT command successful.
150 Opening ASCII mode data connection.
226 Transfer complete.
ftp: 1841 bytes sent in 0.00seconds 1841000.00kbytes/sec.
ftp> put test2.edi
200 PORT command successful.
150 Opening ASCII mode data connection.
226 Transfer complete.
ftp: 1841 bytes sent in 0.00seconds 1841000.00kbytes/sec.
ftp> bye
221 You have transferred 3682 bytes in 2 file(s): 38704      FOOTBAR
TESTINC          ZZ          1841      OK |38705      FOOTBAR 100008035
9478             PO          1841      OK |38705      FOOTBAR 100008035
TESTINC          ZZ          1841      OK |38705      FOOTBAR 100008035
PO              ZZ          1841      OK |38705      FOOTBAR 100008035
    
```

A file is put with one document.

A file is put with one document.

In fixed format, 221 messages show information about documents sent during a session with fields in a fixed position (see “221 Service Closing Control Connection Messages” on page 82).

The pipe (|) symbol separates documents.

FTP On-Demand Report

The FTP On-Demand Report shows the total number of delivered and received documents processed within a selected timeframe. The report is delivered to your FTP reports directory.

Note: This report lists the same information as the “Document Summary Report,” which can be generated from the **Reports** tab > **Document Summary**.

- “Generating an FTP On-Demand Report” on page 84
- “Retrieving Files from the FTP Reports Directory” on page 85
- “Example Session to Create an FTP On-Demand Report” on page 86
- “Data, Format, and Example” on page 86

Generating an FTP On-Demand Report

Some FTP clients might not directly support SITE commands, which means you might need to use a QUOTE or LITERAL command when sending SITE commands. Consult your FTP client documentation.

To generate the FTP On-Demand Report

- At the FTP command line, type:
`site report query <specifier>`

EXAMPLES

```
site report query session=1103963987
site report query since_last status=err
site report query start=200505100000 end=200505150000
```

Parameter Type	Parameter
Specifiers (one is required)	<ul style="list-style-type: none"> ■ start=yyyymmddhhmm ■ end=yyyymmddhhmm ■ since_last ■ session=<sessionid>
Filters (optional)	<ul style="list-style-type: none"> ■ status=ok, err, all ■ direction=in, out, both ■ tp=<alias.qual> ■ icn=<interchange CtrlNum> ■ type=<doctype>
Format (optional)	<ul style="list-style-type: none"> ■ format_csv ■ format_fixed

FTP generates the report and delivers it to the FTP reports directory (see “Retrieving Files from the FTP Reports Directory” on page 85).

Retrieving Files from the FTP Reports Directory

You can retrieve/get/pull several reports from the FTP reports directory, including the:

- FTP On-Demand Report
- Recurring Reports (if you are an FTP or AS2 customer and the **FTP/AS2 Mailbox** delivery option is selected)

To retrieve reports from the reports directory

1 At the command line in the home directory of the FTP server, change the directory to **reports** by typing:

```
cd reports
```

2 Retrieve the files by typing:

```
get <reportID>.rpt
```

or

```
mget *
(to get all reports)
```

Example Session to Create an FTP On-Demand Report

In this example, the **site report query session=8705 type=PO** command was used to request a report for all purchase orders sent or received in a previous FTP session.

This command generates a report for all purchase orders sent or received in session 8705.

Change to the reports directory to get the report.

Get report 36528.rpt, which is a text file that can be opened using a text editor.

```

230 User 412900238 logged in. Session ID 8709
ftp> site report query session=8705 type=PO
200 Generating report query.
ftp> cd reports
250 CWD command successful.
ftp> ls
200 PORT command successful.
150 Opening ASCII mode data connection.
36528.rpt
226 Transfer complete.
ftp: 11 bytes received in 0.01seconds 0.73kbytes/sec.
ftp> get 36528.rpt
200 PORT command successful.
150 Opening ASCII mode data connection.
226 Transfer complete.
ftp: 106 bytes received in 0.05seconds 2.26kbytes/sec.
ftp> bye
221 You have transferred 105 bytes in 1 file(s).
    
```

The FTP On-Demand Report is in the same format as a Recurring Document Summary report (see “Data, Format, and Example” on page 86).

Data, Format, and Example

The FTP On-Demand and Recurring Document Summary reports display this data, which is shown in CSV format:

```

<DOCID>, <ICN>,<SENDERALIAS>/<SENDERQUAL>, <SENDERNAME>,
<RECVALIAS>/<RECVQUAL>, <RECEIVERNAME>, <DOCTYPE>, <DIRECTION>,
<STATUS>, <DATECREATED>, <DATEDELIVERED>, <DATERECEIVED>, <SIZE>,
<SESSION ID>, <MAILBAG ID>, <NETWORK ID>
    
```

EXAMPLE

```

36499,100008035,ZZ/ABC,FOOTECH,GOBOTT/ZZ,MATTTEST,PO,0,OK,05152005-
05-16 10:03:18.051,,2005-05-16 10:03:29.41,1841,8705,,,,
    
```

In fixed format, the data displays in fixed positions:

Field	Length	Position
Document ID	11	000-010
Interchange Control Number	30	011-040
Sender ID / Qualifier	35	041-075
Sender Name	64	076-139
Receiver ID / Qualifier	35	140-174
Receiver Name	64	175-238
Document Type	30	239-268
Direction	01	269
Status	03	270-272
Date Created	24	273-296
Date Delivered	24	297-320
Date Received	24	321-344
File Size	11	345-355
Inbound Session ID	11	356-366

Field	Length	Position
Outbound Session ID	11	367-377
Mailbag ID	10	378-387
Network ID	20	388-408

Interconnect Usage Report

The Interconnect Usage Report summarizes the traffic sent and received between an account (PSN) and interconnecting networks during the previous month. For example, if the current month is October 2007, the report shows usage information for interconnecting networks for September 2007.

The report can be downloaded to your hard drive as a comma-separated values file (.csv). The file will open in any application that reads .csv files, such as Microsoft Excel.

See “Viewing the Interconnect Usage Report” on page 87.

Viewing the Interconnect Usage Report

To view the Interconnect Usage Report

- 1 Select a single account (PSN).
- 2 Click the **Reports** tab > **Interconnect Usage**.

The report displays a summary of the traffic sent and received between an account (PSN) and interconnecting networks during the previous month (see “Interconnect Usage Report Column Descriptions” on page 88).

Aug 2007						Download CSV File
Network ID	Network Type	Inbound Document Count	Inbound Character Count	Outbound Document Count	Outbound Character Count	
AAFES	PUBLIC	0	0	0	0	
AAFET	PUBLIC	0	0	0	0	
ADVANTIS	PUBLIC	0	0	0	0	
ADVANTX	PUBLIC	0	0	0	0	
ADVNWWEY	PUBLIC	0	0	0	0	
ARI	PUBLIC	0	0	0	0	
ATT	PUBLIC	0	0	0	0	
ATTF	PUBLIC	0	0	0	0	
AWS	PUBLIC	0	0	0	0	
BELLATL	PUBLIC	0	0	0	0	
CAT	PUBLIC	0	0	0	0	
CHRIS	PUBLIC	0	0	0	0	
CHRIS1	PUBLIC	0	0	0	0	
CHRIS2	PUBLIC	0	0	0	0	
CHRISMBINT	PUBLIC	0	0	0	0	
CORRECT	PUBLIC	0	0	0	0	
CSRV	PUBLIC	0	0	0	0	
DECA	PUBLIC	0	0	0	0	
DEFAULTO	PUBLIC	0	0	0	0	
DEFAULTOT	PUBLIC	0	0	0	0	

- 3 To download the report, click **Download CSV File**.

Interconnect Usage Report Column Descriptions

Column	Description
Network ID	Identifier for the interconnecting network.
Network Type	Type of interconnecting network, either public or private.
Inbound Document Count	Number of documents sent to the account (PSN) on Inovisworks by the interconnecting network.
Inbound Character Count	Number of characters in the inbound documents sent to the account (PSN) on Inovisworks by the interconnecting network. Rounded up to the nearest 100.
Outbound Document Count	Number of documents sent to the interconnecting network by the account (PSN) on Inovisworks.
Outbound Character Count	Number of characters in the outbound documents sent to the interconnecting network by the account (PSN) on Inovisworks. Rounded up to the nearest 100.

Managed Services Reports

Inovisworks calculates subscription charges for Managed Services customers based on usage, generating usage reports for Data Transformation Services (DTS) customers.

DTS provides hosted translation, data exchange, and map maintenance for GXS customers in our Managed Services environment.

Note: Managed Services reports viewed through the Reports tab in Inovisworks are real-time, as-of-this-moment reports.

Trading partner reports are compiled using the GS level when available; otherwise, the ISA level is calculated.

- “Managed Services Document Summary Report” on page 88
- “Managed Services Trading Partner History Report” on page 89
- “Managed Services Transaction Summary Report” on page 89

Managed Services Document Summary Report

The Document Summary Report shows you a monthly document and character counts by trading partners and document types.

To open the Managed Services Document Summary Report

- 1 Click **Reports tab > Managed Services > Document Summary Report**.
- 2 Use the current month (default) or select the month from the drop-down list, and click **Go**.

The Document Summary Report opens.

Month: Oct 2006

Oct 2006

My Trading ID/Qualifier	Trading Partner Company Name	Trading Partner Account (PSI)	Trading Partner ID/Qualifier	Document Type	Character Count	Document Count
412906508/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	N/A	0	0
412906645/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	EDI_X12	16252	12
DTSBILL4/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	EDI_X12	16240	12

3 To download the report to a .csv file, click **Download CSV File**.

You can then import the report into a spreadsheet for presentation and printing.

Note: CSV download is not an option if your report contains zero rows.

Your report does not open within Inovisworks if it is more than 100 rows, and must be downloaded as a .csv file.

Managed Services Trading Partner History Report

This report provides you with 36-months of your trading partner history.

To open the Managed Services Trading Partner History Report

- 1 Click **Reports tab > Managed Services > Trading Partner History Report**.
- 2 Use the current month (default) or select the month from the drop-down list, and click **Go**.

The Trading Partner History Report opens.

My Trading ID/Qualifier	Trading Partner Company Name	Trading Partner Account (PSI)	Trading Partner ID/Qualifier	Status	Date
412906508/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	ADDED	Oct 13, 2006 EDT
412906645/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	ADDED	Oct 13, 2006 EDT
DTSBILL4/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	ADDED	Oct 19, 2006 EDT

Note: CSV download is not an option if your report contains zero rows.

Your report does not open within Inovisworks if it is more than 100 rows, and must be downloaded as a .csv file.

Managed Services Transaction Summary Report

The Transaction Summary Report shows your trading partners' monthly document and character count at the transaction level. The transaction type and direction is also listed.

To open the Managed Services Transaction Summary Report

- 1 Click **Reports tab > Managed Services > Transaction Summary Report**.
- 2 Use the current month (default) or select the month from the drop-down list, and click **Go**.

The Transaction Summary Report opens

Month: Oct 2006 Go

[Download CSV File](#)

Oct 2006

My Trading ID/Qualifier	Trading Partner Company Name	Trading Partner Account (PSH)	Trading Partner ID/Qualifier	Transaction Type	Direction	Character Count	Document Count
412906645/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	862	Outbound	15160	8
412906645/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	997	Outbound	280	4
DTSBILL4/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	862	Outbound	15160	8
DTSBILL4/null	DTS BILLING COMPANY 3	412906644	DTSBILL3/null	997	Outbound	280	4

[Download CSV File](#)

3 To download the report to a .csv file, click **Download CSV File**.

You can then import the report into a spreadsheet for presentation and printing.

Note: CSV download is not an option if your report contains zero rows.

Your report does not open within Inoivisworks if it is more than 100 rows, and must be downloaded as a .csv file.

Payer Beneficiary Reports

A payer-beneficiary relationship exists when one party, called the payer, pays for all of another party’s fees for GXS mailboxes or services. Payer-beneficiary relationships can exist between:

- You and your trading partners
- Different organizational units within your company

Two Payer Beneficiary reports are available:

- Payer Beneficiary List (see “Viewing the Payer Beneficiary List Report” on page 90)
- Payer Beneficiary Usage (see “Viewing the Payer Beneficiary Usage Report” on page 91)

After generating the reports, you can download them to your hard drive as comma-separated value files (.csv). The files will open in any application that reads .csv files, such as Microsoft Excel.

- “Downloading a Payer Beneficiary List or Usage Report” on page 92

Viewing the Payer Beneficiary List Report

To view the Payer Beneficiary List Report

- 1** Click the **Reports** tab > **Payer Beneficiary** > **Payer Beneficiary List**.

The report displays a list of beneficiary accounts for the company (see “Payer Beneficiary List Field Descriptions” on page 91).

[Download CSV File](#)

Account (PSH)	Company Name	Service Description
412900196	INOVIS WEBFORMS DEMO	FTP Service
412900197	INOVIS CATALYST DEMO	FTP Service

[Back](#)

- 2** Click **Back** to go back to the Reports tab.

Payer Beneficiary List Field Descriptions

Field	Type or Select
Account (PSN)	Account (PSN) for the payer's beneficiary.
Company Name	Name of the payer's beneficiary company or division.
Service	Mailbox or service for which the payer is being billed.

Viewing the Payer Beneficiary Usage Report

To view the Payer Beneficiary Usage Report

- 1 Click the **Reports** tab > **Payer Beneficiary** > **Payer Beneficiary Usage**.

The report displays usage information for beneficiary accounts for the company (see "Payer Beneficiary Usage Report Column Descriptions" on page 92).

[Download CSV File](#)

Feb 2007

Customer ID	Account (PSN)	Company Name	Default Trading ID-Qualifier	Program Code	Trading Partners	Sent Documents	Received Documents	Exported Documents	Initiated Documents	Sent Characters	Received Characters	Exported Characters	Initiated Characters	Public Interconnects	Private Interconnects
501980911	412907198	CC BILLING COMPANY 32	CCBILLING32ZZ	FTP	1	1	0	0	1	2100	0	0	2100	0	0
501980913	412907200	CC BILLING COMPANY 34	CCBILLING34ZZ	FTP	0	0	1	0	0	0	2100	0	0	0	0

[Back](#)

- 2 Click **Back** to go back to the Payer Beneficiary Reports page.

Payer Beneficiary Usage Report Column Descriptions

Column	Description
Customer ID	Identifier for the payer's beneficiary.
Account (PSN)	Account (PSN) for the payer's beneficiary.
Company Name	Name of the payer's beneficiary company or division.
Default Trading ID/Qualifier	Default trading identifier and qualifier for the payer's beneficiary's account (PSN).
Program Code	Code for the mailbox or service for which the payer is being billed.
Trading Partners	Number of trading partners that trade with the payer's beneficiary's account (PSN).
Sent Documents	Number of documents sent by the payer's beneficiary.
Received Documents	Number of documents received by the payer's beneficiary.
Exported Documents	Number of documents exported by the payer's beneficiary.
Initiated Documents	Number of documents initiated by the payer's beneficiary.
Sent Characters	Character count of the documents sent by the payer's beneficiary.
Exported characters	Character count of the documents exported by the payer's beneficiary.
Initiated characters	Character count of the documents initiated by the payer's beneficiary.
Received Characters	Character count of the documents received by the payer's beneficiary.
Public Interconnects	Number of public interconnects in which the payer's beneficiary traded documents.
Private Interconnects	Number of private interconnects in which the payer's beneficiary traded documents.

Downloading a Payer Beneficiary List or Usage Report
To download a Payer Beneficiary List or Usage Report

- 1 Click **Download CSV file**.
- 2 Select **Save**.
- 3 Navigate to where you want to save the file > click **Save**.

Recurring Reports

Recurring document summary and trading partner reports can be sent to you on a regular basis. The reports can be delivered:

- Using email
- To your FTP reports directory (FTP customers only)
- Sent over AS2 as a binary file (AS2 customers only)

You can also use the Document Tracking tab to view the reports (see "Viewing Recurring Reports in Document Tracking" on page 96).

Note: Recurring reports are considered documents. Based on your billing plan, additional charges might be added to your monthly invoice.

- "Defining a Recurring Document Summary Report" on page 93
- "Defining a Recurring Trading Partner Report" on page 94

- “Data, Format, and Example” on page 86
- “Retrieving Files from the FTP Reports Directory” on page 85
- “Viewing Recurring Reports in Document Tracking” on page 96
- “Stopping a Recurring Report” on page 97
- “Recurring Reports with No Data” on page 97

Defining a Recurring Document Summary Report

To define a Recurring Document Summary Report

- 1 Click the **Reports** tab > **Setup Recurring** > **Document Summary Report**.

The Recurring Report Document Summary page opens.

The screenshot shows the configuration page for a Recurring Report Document Summary. The page is divided into several sections with callouts:

- Report frequency.** Points to the Frequency section with radio buttons for Weekly (selected), Daily, and Hourly.
- Accounts (PSNs) to be included in the report.** Points to the Accounts section with radio buttons for All (including beneficiary accounts) (selected), Only my accounts, and Selected Accounts. Below are text boxes containing account numbers: 412900123 and 412900961.
- Enabled activates the report. Disabled stops the report.** Points to the Status section with radio buttons for Enabled (selected) and Disabled.
- File format** points to the File Format section with radio buttons for Fixed-length fields and CSV (selected).
- Display, column, and delivery options.** Points to the Display Options section with checkboxes for Include Column Headers and Include Report Trailer.
- Displays only if you transmit files using FTP or AS2. Select to deliver report to your FTP reports directory or have it sent as a binary file over AS2.** Points to the Delivery Options section with radio buttons for FTP/AS2 Mailbox (selected) and E-mail. Below are text boxes for delivery details: 412900123, Delivered to default TradingID for selected PSN, brian.jennings@inovis.com, and ming.tian@inovis.com.
- Account (PSN) to which you want any changes for the recurring report to be billed. Based on your billing plan, additional charges might be added to your monthly invoice.** Points to the Bill to PSN section with a dropdown menu showing 412900123.

- 2 Type or select the criteria for the report (see “Recurring Document Summary Report Field Descriptions” on page 94).

- Status and Frequency
- Accounts on which the report should be run
- Format, display, column, and delivery options

- 3 Click **Save**.

The report is delivered at the requested frequency using the requested delivery method.

- “Data, Format, and Example” on page 86
- “Retrieving Files from the FTP Reports Directory” on page 85
- “Viewing Recurring Reports in Document Tracking” on page 96
- “Stopping a Recurring Report” on page 97

Recurring Document Summary Report Field Descriptions

Field	Type or Select
Status	<ul style="list-style-type: none"> ■ Enabled—To activate the recurring report. ■ Disabled—To stop the recurring report.
Frequency	Report frequency. Reports can be generated: <ul style="list-style-type: none"> ■ Weekly—Filters data on a weekly basis. Report is generated Sunday at 3 a.m. EST for the previous week’s data. ■ Daily—Filters data on a daily basis. Report is generated at 2 a.m. EST for the previous day’s data. ■ Hourly—Filters data on an hourly basis. Report is generated 20 minutes after the hour for data processed the previous hour.
Accounts	Accounts for which the report will be generated. <ul style="list-style-type: none"> ■ All (including beneficiary accounts—All accounts (PSNs) you can maintain, including accounts you are paying for through payer-beneficiary relationships. ■ Only My Accounts—Only accounts (PSNs) you can maintain. ■ Selected Accounts—Multiple accounts (PSNs) you can maintain (including beneficiaries). Use to generate the report for a subset of accounts.
File Format	<ul style="list-style-type: none"> ■ Fixed-length fields—To format report as fixed-length fields, which allows programmatic analysis of the data. ■ CSV—To format report as comma-separated values. Report can be imported into a spreadsheet application, such as Microsoft Excel.
Display Options	<ul style="list-style-type: none"> ■ Include Column Headers—To include column headings in the report. ■ Include Report Trailer—To include an end of transmission line at the end of the report.
Column Options	<ul style="list-style-type: none"> ■ Basic—To include basic column headings ■ Advanced—To include basic column headings, plus transaction and functional group counts.
Delivery Options	<ul style="list-style-type: none"> ■ FTP/AS2 Mailbox—Displays only if you transmit files using FTP or AS2. Deliver report to the FTP reports directory or send it as a binary file over AS2. ■ PSN—Displays only if you transmit files using FTP or AS2. Mailbox to which the report will be delivered. ■ Email—Email addresses for the login ID.
Billing	Account (PSN) to which any charges for the recurring report will be billed (based on your billing plan).

Defining a Recurring Trading Partner Report

To define a Recurring Trading Partner Report

- 1 Click the **Reports** tab > **Setup Recurring** > **Trading Partner Report**.

The Recurring Report Trading Partner page opens.

The screenshot shows the 'Recurring Report Trading Partner' configuration page. It includes several sections with callouts:

- Report frequency:** A callout box labeled 'Report frequency.' points to the 'Frequency:' field, which has radio buttons for 'Weekly' (selected) and 'Monthly'.
- Accounts (PSNs) to be included in the report:** A callout box labeled 'Accounts (PSNs) to be included in the report.' points to the 'Accounts:' section, which has radio buttons for 'All (including beneficiary accounts) show me', 'Only my accounts show me', and 'Selected Accounts (Use CTRL for multi-select)'. Below this, a text box contains the PSNs '412900964' and '412901340'.
- Status:** A callout box labeled 'Enabled activates the report. Disabled stops the report.' points to the 'Status:' field, which has radio buttons for 'Enabled' (selected) and 'Disabled'.
- File format:** A callout box labeled 'File format' points to the 'File Format:' field, which has radio buttons for 'Fixed-length fields' and 'CSV' (selected).
- Display, column, and delivery options:** A callout box labeled 'Display, column, and delivery options.' points to the 'Display Options:' and 'Delivery Options:' sections. 'Display Options' includes checkboxes for 'Include Column Headers' and 'Include Report Trailer'. 'Delivery Options' includes radio buttons for 'FTP/AS2 Mailbox' (selected) and 'E-mail (Use CTRL for multi-select)'. Below this, a text box contains email addresses: 'm.tian@inovis.com', 'ming.tian@inovis.com', and 'sdsd@iu.com'.
- Bill to PSN:** A callout box labeled 'Displays only if you transmit files using FTP or AS2. Select to deliver report to your FTP reports directory or have it sent as a binary file over AS2.' points to the 'Delivery Options:' section. Another callout box labeled 'Account (PSN) to which you want any changes for the recurring report to be billed. Based on your billing plan, additional charges might be added to your monthly invoice.' points to the 'Bill to PSN:' dropdown menu, which is set to '412900964'.

2 Type or select the criteria for the report (see “Recurring Trading Partner Report Field Descriptions” on page 96).

- Status and Frequency
- Accounts on which the report should be run
- Format, display, column, and delivery options

3 Click **Save**.

The report is delivered at the requested frequency using the requested delivery method.

- “Retrieving Files from the FTP Reports Directory” on page 85
- “Viewing Recurring Reports in Document Tracking” on page 96
- “Stopping a Recurring Report” on page 97

Recurring Trading Partner Report Field Descriptions

Field	Type or Select
Status	<ul style="list-style-type: none"> ■ Enabled—To activate the recurring report. ■ Disabled—To stop the recurring report.
Frequency	Report frequency. Reports can be generated: <ul style="list-style-type: none"> ■ Weekly—Filters data on a weekly basis. Report is generated Sunday at 3 a.m. EST for the previous week’s data. ■ Monthly—Filters data on a monthly basis. Report is generated at 3 a.m. EST on the first day of the month.
Accounts	Accounts for which the report will be generated. <ul style="list-style-type: none"> ■ All (including beneficiary accounts—All accounts (PSNs) you can maintain, including accounts you are paying for through payer-beneficiary relationships. ■ Only My Accounts—Only accounts (PSNs) you can maintain. ■ Selected Accounts—Multiple accounts (PSNs) you can maintain (including beneficiaries). Use to generate the report for a subset of accounts.
File Format	<ul style="list-style-type: none"> ■ Fixed-length fields—To format report as fixed-length fields, which allows programmatic analysis of the data. ■ CSV—To format report as comma-separated values. Report can be imported into a spreadsheet application, such as Microsoft Excel.
Display Options	<ul style="list-style-type: none"> ■ Include Column Headers—To include column headings in the report. ■ Include Report Trailer—To include an end of transmission line at the end of the report.
Delivery Options	<ul style="list-style-type: none"> ■ FTP/AS2 Mailbox—Displays only if you transmit files using FTP or AS2. Deliver report to the FTP reports directory or send it as a binary file over AS2. ■ PSN—Displays only if you transmit files using FTP or AS2. Mailbox to which the report will be delivered. ■ Email—Email addresses for the login ID.
Billing	Account (PSN) to which any charges for the recurring report will be billed (based on your billing plan).

Viewing Recurring Reports in Document Tracking

To view recurring reports using Document Tracking

- 1 Click the **Document Tracking** tab > **Advanced Search**.
- 2 Select the date range.
- 3 In Document Type, either:
 - Select **Report—GXS Recurring Report** from the drop-down list, or
 - Select Free Format and type **REPORT**.



- 4 Click **Advanced Search**.

The Document List displays all reports for the time period. Reports have a document type of REPORT.

5 Click the **Document ID**.

The View Detail page opens.

6 To view the details of the report, click **View Content**.

The report displays (see “Data, Format, and Example” on page 86).

Note: If no data is available for a recurring report, the report is blank (in other words, it displays nothing).

Stopping a Recurring Report

To stop a Recurring Report

1 Click the **Reports** tab > **Setup Recurring**.

2 Select the **Document Summary Report** or **Trading Partner Report**.

The appropriate Recurring Report page opens.

3 Select **Disabled**.

The recurring report has been stopped.

Recurring Reports with No Data

If you do not select the Include Report Header or Report Trailer display options and a recurring report runs when no data is available, the report will have a subject line.

Depending on how the report is delivered, the report content will either:

Display...	If...
A series of commas (,,,,,,,,,,,,,,,,)	Delivered using AS2
Nothing (be blank)	Viewed using the Document Tracking tab

Trading Partner Report

When it initially opens, the Trading Partner Report lists trading partners with which an account (PSN) has exchanged interchange-level documents during the previous month. By selecting various options, the report can be modified to include:

- Account (PSN) level information about the trading partners with which your company exchanges documents. Selecting this option eliminates redundant trading ID/qualifier information.
- Transaction level (GS or functional group) or XML or binary information about exchanged documents for trading partners or account (PSNs).
- Usage information for trading partners or account (PSNs). Usage information shows your company’s network activity based on the number of documents or characters exchanged.

After selecting a trading partner, you can view the trading partner’s contact information.

Important: If you want to compare a Trading Partner Report with your monthly invoice from GXS, select the Account (PSN) and Include GS level trading partners options.

Report Type: Trading ID Account (PSN)

Include GS level trading partners.

Show Usage.

The report can be downloaded to your hard drive as a comma-separated value file (.csv). The file will open in any application that reads .csv files, such as Microsoft Excel.

- “Viewing a Trading Partner Report” on page 98
- “Downloading a Trading Partner Report” on page 100

Viewing a Trading Partner Report

To view a Trading Partner Report

- 1 Select a single account (PSN).
- 2 Click the **Reports** tab > **Trading Partner**.

The page displays the trading partners with which you have exchanged interchange-level documents using the Inovisworks network.

Trading partners with which an account (PSN) exchanged documents in the time period.

Report Type: Trading ID Account (PSN)

Include GS level trading partners.

Show Usage.

Refresh List Download CSV File

trading partner count = 5 deleted trading partner count for dates between 8/1/07 and 9/5/07 = 2 View

	My Trading ID	My Qualifier	Partner Account (PSN)	Partner Trading ID	Partner Qualifier	Partner Company Name	Provider	Created Date
<input type="radio"/>	THIRDCATA	ZZ	412900940	TRADING22	ZZ	TRADING COMPANY	AAFES	Aug 27, 2007 EDT
<input type="radio"/>	THIRDCATA	ZZ	412900947	TRADING1		LALALA	KUNAL	Aug 27, 2007 EDT
<input type="radio"/>	THIRDCATA	ZZ	412900948	TRADING5		LALALA	KUNAL	Aug 27, 2007 EDT
<input type="radio"/>	THIRDCATA	ZZ	412900952	TRADING9		ZOOMZOOM	GEISFTP	Aug 28, 2007 EDT
<input type="radio"/>	THIRDCATA	ZZ	412900956	TRADING8		FUNSTORE	AAFES	Aug 29, 2007 EDT

View

Trading partners deleted in the time period.

- 3 Perform the appropriate action:

If you want the report to include...	Do this...
Account (PSN) level information (eliminates redundant trading ID/qualifiers)	<p>4 Select Account (PSN).</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Report Type: <input type="radio"/> Trading ID <input checked="" type="radio"/> Account (PSN)</p> </div> <p>5 Click Refresh List.</p>
Transaction level (GS or functional group level) or XML or binary information	<p>6 Select Include GS level trading partners.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p><input checked="" type="checkbox"/> Include GS level trading partners.</p> </div> <p>7 Click Refresh List.</p>

If you want the report to include...	Do this...
Usage information for the trading partner for the previous month	<p>8 Select Show Usage.</p> <div style="border: 1px solid black; padding: 5px; display: inline-block;"> <input checked="" type="checkbox"/> Show Usage. </div> <p>9 Click Refresh List.</p>
Trading partner contact information	<p>10 Select the trading partner.</p> <p>11 Click View.</p>

12 Based on your selections, the report opens (see “Trading Partner Report Column Descriptions” on page 100). The graphic shows additional fields that display when Show Usage is selected.

Trading partner usage information for the prior month.

Include GS level trading partners.
 Show Usage.

* All billing usage values are for the usage month of April 2006
** Usage values are not currently available at the GS level

trading partner count = 12		deleted trading partner count for dates between 4/1/06 and 5/30/06 = 0				<input type="button" value="View"/>					
My Trading ID	My Qualifier	Partner Account (PSI)	Partner Trading ID	Partner Qualifier	Partner Company Name	Provider	Created Date	' Docs Sent (Out)	' Docs Received (In)	' Chars Sent (Out)	' Chars Received (In)
<input type="radio"/> GRSND		412900169	GRRCV		ATLANTA BRAVES		Oct 17, 2005 EDT	**	**	**	**
<input type="radio"/> BRIDGES	ZZ	412900169	BRAVES	ZZ	ATLANTA BRAVES		Oct 18, 2005 EDT	0	0	0	0
<input type="radio"/> BRIDGES	ZZ	301425426	BRIDGES_MB	ZZ	BRIDGES_MB	CHRIS	Oct 26, 2005 EDT	0	0	0	0
<input type="radio"/> 072271711		301425426	BRIDGES_MB	ZZ	BRIDGES_MB	CHRIS	Oct 26, 2005 EDT	**	**	**	**
<input type="radio"/> 072271711		412900280	019367486		BRIDGES2		Nov 07, 2005 EST	**	**	**	**
<input type="radio"/> BRIDGES		301425426	BRIDGES_MB		BRIDGES_MB	CHRIS	Nov 11, 2005 EST	0	0	0	0
<input type="radio"/> 072271711		412900305	019367486		BRIDGES_FTP		Nov 16, 2005 EST	**	**	**	**
<input type="radio"/> 0600603000003C		412900305	362407041C		BRIDGES_MB	CHRIS	Nov 22, 2005 EST	**	**	**	**
<input type="radio"/> 0600603000003C		412900305	362407041C		BRIDGES_FTP		Nov 22, 2005 EST	**	**	**	**
<input type="radio"/> BRIDGES	ZZ	412900279	BRIDGES	ZZ	BRIDGES1		Dec 01, 2005 EDT	165	147	804900	381200

Usage data for the previous month for an interchange level trading partner.

- Zeros (0) mean no documents were exchanged with the trading partner during the month.
- Two asterisks (**) indicate usage data is not available for GS level trading partners.

13 To download the report, click **Download CSV File** (see “Downloading a Trading Partner Report” on page 100).

14 To return to the list page, click the **List** breadcrumb.

Trading Partner Report Column Descriptions

Column	Description
My Trading ID	Your company's trading identifier.
My Qualifier	Your company's qualifier.
Partner Account (PSN)	Trading partner's account (PSN).
Partner Trading ID	Trading partner's trading identifier.
Partner Qualifier	Trading partner's qualifier.
Partner Company Name	Name of the trading partner's company.
Provider	Name of the interconnecting network used to transfer data.
Created Date	Date the trading partner was created on the GXS network.
Docs Sent (Out)	Number of documents sent by the trading partner.
Docs Received (In)	Number of documents received by the trading partner.
Chars Sent (Out)	Number of kilo characters sent by the trading partner.
Chars Received (In)	Number of kilo characters received by the trading partner.

Downloading a Trading Partner Report

To download a Trading Partner Report

1 Click **Download CSV file**.

2 Select **Save**.

Navigate to where you want to save the file > click **Save**.

Inovisworks customers assigned the Customer Admin role are able to work with all company accounts. Those assigned the Customer User role work with accounts assigned to their login ID.

For information about roles and functions, see “Roles and Functions” on page 19.

- “Maintaining Accounts” on page 101
- “Maintaining Archive and Restore” on page 104
- “Maintaining Customer Information” on page 111
- “Scheduling Documents” on page 112
- “Maintaining Event Notification” on page 117
- “Changing Your Password” on page 134
- “Maintaining Trading Partners” on page 135
- “Maintaining User Information” on page 139

Maintaining Accounts

For account maintenance information, see:

- “Viewing an Account” on page 101
- “Editing an Account” on page 101
- “Adding a Trading Profile to an Account” on page 102
- “Adding an Account (Service) to an Existing Profile” on page 102

Viewing an Account

To view an account

- 1 Click the **Administration** tab > **Account**.

The Account List page opens.

- 2 Select the account you want to view > click **View**.

Information about the selected account opens.

Note: Click **Edit Account** if you want to edit this information from this page (see “Editing an Account” on page 101).

Editing an Account

Accounts can be changed to update an account name, trading profile, and technical contacts.

To edit an account

- 1 Click the **Administration** tab > **Account**.
The Account List page opens.
- 2 Select the account you want > click **Edit**.
Account Name, Trading Profile, Outbound File Configuration, and Technical Contact information opens.
- 3 Edit the account information.
- 4 Click **Update Account**.
The account is updated and the Account List page opens.

Adding a Trading Profile to an Account**To add a trading profile to an account**

- 1 Click the **Administration** tab > **Account**.
The Account List page opens.
- 2 Select the account you want > click **Edit**.
- 3 In the Trading Profile area, click **Add**.
The Add Trading Profile page opens.
- 4 Type the trading ID and qualifier. If you want this to be your default trading profile, select the **Set as default?** check box.
- 5 Click **Add Trading Profile**.
The new trading profile is added to the trading profile list.
- 6 Click **Update Account**.
The account is updated and the Account List page opens

Adding an Account (Service) to an Existing Profile**To add an account (service)**

- 1 Click the **Administration** tab > **Account**.
The Account List page opens.
- 2 Click **Add**.
The Add Account services list opens.
- 3 Select the service you need and click **Continue**.
- 4 If the service you've selected is online enabled, read the License Subscriber Agreement, select the check box indicating you have read and agree to the agreement, then click **Accept**.

The Add Account page opens.

Do not use the browser back button during this procedure. It might cause conflicts with Invisworks.

Important: For each account (service), the user's email address must be unique.

After typing or selecting all of the information needed, click **Step 2**.

5 Type or select the information needed > click **Step 2**.

See the page graphic for clarity.

6 Type or select the remaining required information.

7 Click **Step 3**.

The number of pages and steps depends on the service selected.

Note: If errors prevent you from adding an account, click **Previous** to reach the page where the correction is needed.

Do not use your browser back button to return to a previous page as this can conflict with Inoivisworks.

8 Verify the information and click **Register**.

Important: Make note of the assigned Login ID, Account Number (PSN), and the Customer ID.

9 Click **Continue** and the Account List page opens showing the service you added.

Note: If the service you want is not Online Enabled, contact:

GXS Support

Product Support: U.S.—+1 877.446.6847; EMEA—+44 (0)1483 569388

For International support outside EMEA, call +1 404.467.3806

Maintaining Archive and Restore

You can perform the procedures in this topic only if you subscribe to the premium archive and restore service.

Archive and restore lets you use Inoivisworks to store documents sent and received within a specific time frame. You can search for, view, and restore the documents as needed. Documents can be archived for a maximum of ten years.

Contact the GXS Solution Center at +1 877.446.6847 to activate the archive and restore service. After the service is active, you can create archive and restore configurations and view and restore documents that have been archived.

- “About Archive and Restore” on page 105
- “Viewing Your Archive and Restore Settings” on page 105
- “Adding an Archive and Restore Configuration” on page 106
- “Viewing an Archive and Restore Configuration” on page 106
- “Editing an Archive and Restore Configuration” on page 106
- “Deleting an Archive and Restore Configuration” on page 107
- “Setting Up Email Addresses for Archive and Restore Changes” on page 107
- “Searching for Archived Documents” on page 107
- “Viewing Archived Document Details” on page 109
- “Viewing the Content of Archived Documents” on page 110
- “Restoring Archived Documents” on page 110
- “Unsubscribing from the Archive and Restore Service” on page 110

About Archive and Restore

Inovisworks keeps your current documents for 35 days (default) and makes them available to you using Document Tracking.

After 35 days, if you subscribe to archive and restore, Inovisworks puts your documents in an Archive Repository for the time period defined in your archive and restore configuration, such as 12 months. After the time period has expired, Inovisworks purges the documents (see “Archived Information” on page 105).

Archived Information

Inovisworks stores only the final version of a document. That is, Inovisworks stores the “delivered” version of a document after it has passed inbound rules, parsing and splitting, and routing rule processing. For more information, see “Encrypted and Decrypted Documents” on page 105.

ENCRYPTED AND DECRYPTED DOCUMENTS

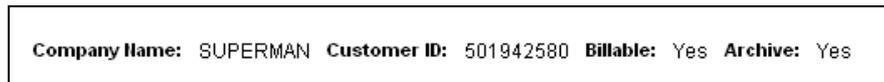
The table shows which version of an encrypted or decrypted document Inovisworks archives.

If you send an...	And Inovisworks...	Inovisworks archives the...
Encrypted file	<ul style="list-style-type: none"> ■ Sends the encrypted file to the receiver. ■ The receiver decrypts the file. 	Encrypted file
Encrypted file	<ul style="list-style-type: none"> ■ Decrypts the file using the Simple Decrypt or PGP Decrypt inbound rule. ■ Routes and delivers the decrypted file to the receiver. 	Decrypted file
Unencrypted file	<ul style="list-style-type: none"> ■ Encrypts the file using the Simple or Encrypt or PGP Encrypt router rule. ■ Routes and delivers the encrypted file to the receiver. 	Encrypted file

Viewing Your Archive and Restore Settings

To view your archive and restore settings

- I Click the **Administration** tab > **Customer**.



Your Archive and Restore settings display at the top of the page. Contact GXS if you want to change the settings. See “Archive Status and Available Actions” on page 105.

ARCHIVE STATUS AND AVAILABLE ACTIONS

Access your archive and restore settings by clicking **Administration** tab > **Customer**.

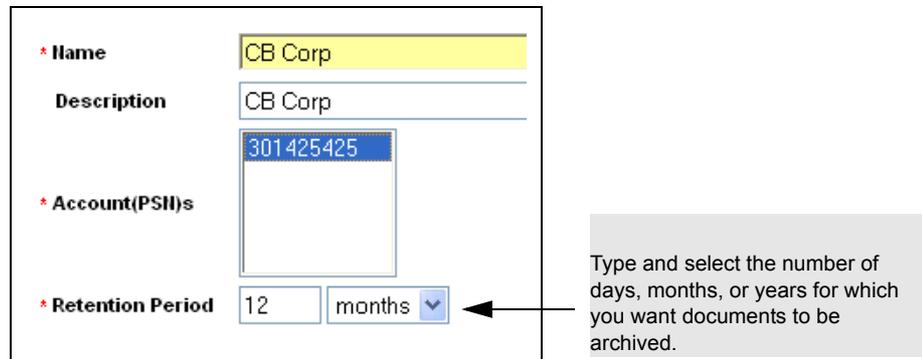
If you subscribe to archive and restore and...			
The Archive check box is...	Grace period is...	Archive & restore status is...	You can perform these actions...
Selected	NA	Enabled	Search for, view, and export archived documents
Deselected	In effect	On Hold	Cannot search for, view, or export archived documents. Note: To reactivate the service, call GXS.
	Has expired	Disabled	Cannot search for, view, or export archived documents. Note: To reactivate the service, call GXS.

Adding an Archive and Restore Configuration

After GXS activates the service, you can define the time periods (*retention periods*) for which GXS is to keep selected documents.

To set up an archive and restore configuration

- 1 Click the **Administration** tab > **Archive & Restore** > **Archive Configurations** > **Add**.
- 2 Type the name and description of the configuration.
- 3 Select the accounts (PSNs) to which the archive and restore settings apply.



- 4 In Retention Period, type the period of time > select days, months or years for which documents are to be archived.
- 5 Click **Add Archive Configuration**.

Viewing an Archive and Restore Configuration
To view an archive and restore configuration

- 1 Click the **Administration** tab > **Archive & Restore** > **Archive Configurations**.
- 2 Select the configuration > click **View**.

Note: If you want to make changes to the configuration, click **Edit Archive Configuration**.

Editing an Archive and Restore Configuration

To edit an archive and restore configuration

- 1 Click the **Administration** tab > **Archive & Restore** > **Archive Configurations**.
- 2 Select the configuration > click **Edit**.
- 3 Make changes to the configuration.
- 4 Click **Update Archive Configuration**.

Deleting an Archive and Restore Configuration

To delete an archive and restore configuration

- 1 Click the **Administration** tab > **Archive & Restore** > **Archive Configurations**.
- 2 Select the configuration > click **Delete**.
- 3 Verify that you want to delete the configuration > click **Delete Archive Configuration**.

Setting Up Email Addresses for Archive and Restore Changes

If you subscribe to archive and restore, you can be notified automatically when status or configuration changes occur (see “Setting Up Document or Archive Event Notifications” on page 121).

Searching for Archived Documents

Use this procedure to search for documents that have been archived. Use the Document Tracking tab to view current documents.

You can search for archived documents at the document level.

To search for archived documents

- 1 Click the **Administration** tab > **Archive & Restore** > **Archive Search**.

The Archive & Restore Search page opens.

Sender and recipient trading IDs, including qualifiers.

2 Determine the appropriate action.

If you want to find...	Do this...
A specific archived document	<p>3 In the Quick Search area, type the Application Assigned Number or Document ID (see “Quick Search Fields” on page 108)</p> <p>4 Click Quick Search.</p>
All documents archived within a timeframe	<p>5 In the Basic Search area, type or select information to refine your search (see “Basic Search Fields” on page 108).</p> <p>6 Click Basic Search.</p>

The Archive Search page opens with the results of the search.

Total Archived Documents found: **9420** Views: 100 Rows Page 95 of 95 First | Previous | Next | Last

Document ID	Doc Type	Status	Sender	Receiver	Processed Time	Archived Date	ICII	Original Filename
252414897	DESADV	Available	SUPERMAN (412901369/ZZ)	GEORGIA TECH (412901371/ZZ)	08/20/2006 18:11:50	10/05/2006 12:19:55	2790980	doc_2790980.txt
252425465	DESADV	Available	SUPERMAN (412901369/ZZ)	GEORGIA TECH (412901371/ZZ)	08/20/2006 18:11:50	10/05/2006 12:19:55	2797121	doc_2797121.txt

7 Perform the appropriate action:

- “Viewing Archived Document Details” on page 109

- “Viewing the Content of Archived Documents” on page 110
- “Restoring Archived Documents” on page 110

Quick Search Fields

You can perform a quick search using these fields:

Field	Type
Application Assigned Number	Number assigned to the document, such as a purchase order number.
Document ID	Identifier that establishes the identity of a document on the GXS network. Example: 215166988

Basic Search Fields

You can perform a basic search using these fields:

Field	Type or Select
Direction	Direction of the document relative to the customer: <ul style="list-style-type: none"> ■ Inbound ■ Outbound ■ Both
Status	Status of the document. The status selection is determined by the selected direction.
File Name	Exact name of a file.
Interchange Control Number	For EDI documents, interchange control number at the interchange level.
Start Date/End Date	Date range for the search; that is, the date of the archived document.
Start Time/End Time	Time period for the search, the time of the archived document.
Sender Trading ID	Trading ID for the sender of the document, including a qualifier. Example: 2830202782/I2
Recipient Trading ID	Trading ID for the recipient of the document, including a qualifier. Example: 7730202785/ZZ

Viewing Archived Document Details

You can view detailed information about archived documents.

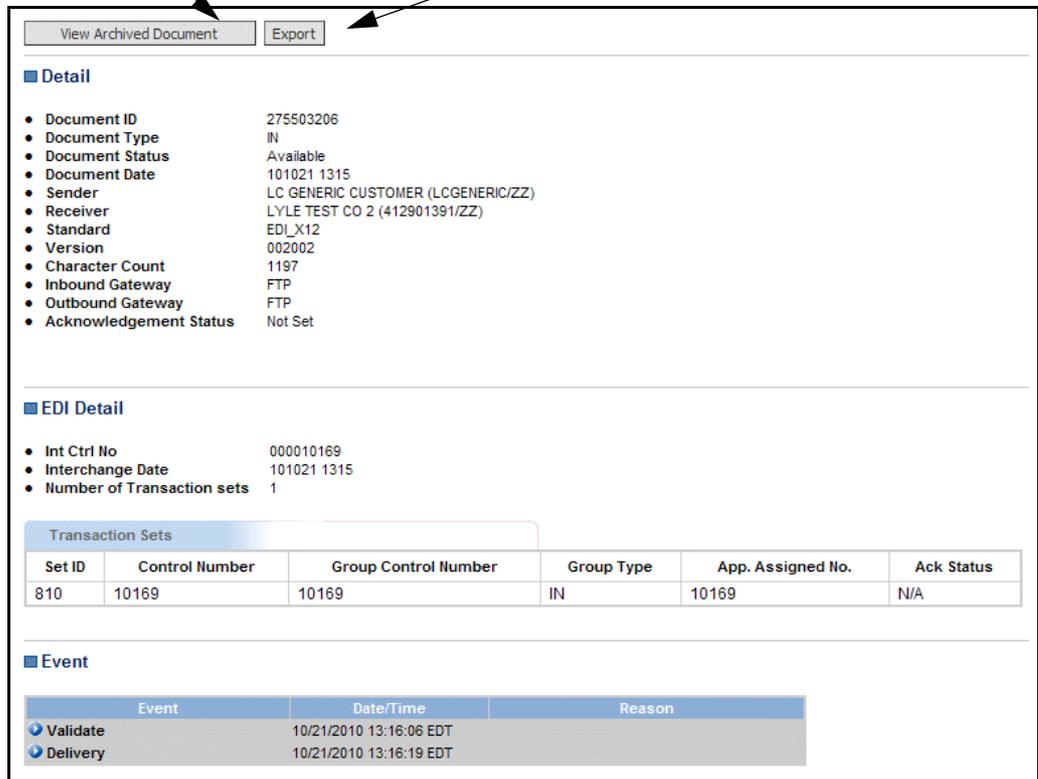
To view an archived document's details

- 1 Click the **Administration** tab > **Archive & Restore** > **Archive Search**.
- 2 Search for archived documents (see “Searching for Archived Documents” on page 107).
- 3 Click the Document ID.

The Archived Document Details page opens.

Click to view the archived document's content (see "Viewing the Content of Archived Documents" on page 110).

Click to restore an archived document (see "Restoring Archived Documents" on page 110).



View Archived Document Export

Detail

- Document ID 275503206
- Document Type IN
- Document Status Available
- Document Date 101021 1315
- Sender LC GENERIC CUSTOMER (LCGENERIC/ZZ)
- Receiver LYLE TEST CO 2 (412901391/ZZ)
- Standard EDI_X12
- Version 002002
- Character Count 1197
- Inbound Gateway FTP
- Outbound Gateway FTP
- Acknowledgement Status Not Set

EDI Detail

- Int Ctrl No 000010169
- Interchange Date 101021 1315
- Number of Transaction sets 1

Transaction Sets

Set ID	Control Number	Group Control Number	Group Type	App. Assigned No.	Ack Status
810	10169	10169	IN	10169	N/A

Event

Event	Date/Time	Reason
Validate	10/21/2010 13:16:06 EDT	
Delivery	10/21/2010 13:16:19 EDT	

Viewing the Content of Archived Documents

Note: If a document is stored in EBCDIC format, Inoivisworks displays it in ASCII format.

To view the details of archived documents

- 1 Click the **Administration** tab > **Archive & Restore** > **Archive Search**.
- 2 Search for archived documents (see "Searching for Archived Documents" on page 107).
- 3 Click the Document ID.
- 4 Click **View Archived Document**.

Restoring Archived Documents

You can restore archived documents to your hard drive.

Important: You must retransmit restored archived documents to GXS and send them to a trading partner as new document. Archived documents cannot be reprocessed or resent from Inoivisworks.

To restore an archived document

- 1 Click the **Administration** tab > **Archive & Restore** > **Archive Search**.
- 2 Search for archived documents (see "Searching for Archived Documents" on page 107).
- 3 Click the Document ID.

The Archive Document Details page opens.

4 Click **Export**.

The File Download dialog box opens.

5 Select **Save this file to disk**.

6 Click **OK**.

The Save As dialog box opens.

7 Navigate to the location where you want to save the downloaded file > click **Save**.

The archived document is saved on your hard drive.

Unsubscribing from the Archive and Restore Service

If you decide to discontinue the archive and restore service, Inovisworks keeps your data until the end of the next calendar month. This time period is called a *grace period*. After the end of the grace period, Inovisworks purges your archived data.

Note: Inovisworks does not archive any new information during the grace period.

Grace Period Example

The image shows three calendar screenshots illustrating the grace period. The first screenshot shows August 2010 with the 18th circled. The second screenshot shows the 30th circled. The third screenshot shows the 1st of the following month circled. Arrows point from text boxes to these dates.

On the 18th, the archive and restore service was disabled.

The grace period begins on the 19th **until the end of the next calendar month**.
Inovisworks keeps documents archived before the 18th in the Archive Repository.
Note: Inovisworks does not archive any new information during the grace period.

After the grace period ends, Inovisworks purges your documents from the Archive Repository.

Maintaining Customer Information

Customer information includes your billing contact and payment information. If your company subscribes to the Functional Acknowledgement (FA) premium service, it also includes settings that indicate your company’s hours of operation.

- “Viewing Customer Information” on page 111
- “Editing Customer Information” on page 111

Viewing Customer Information

To view your customer information

- Click the **Administration** tab > **Customer**.

The customer view window opens displaying your Customer and Payment information.

Editing Customer Information

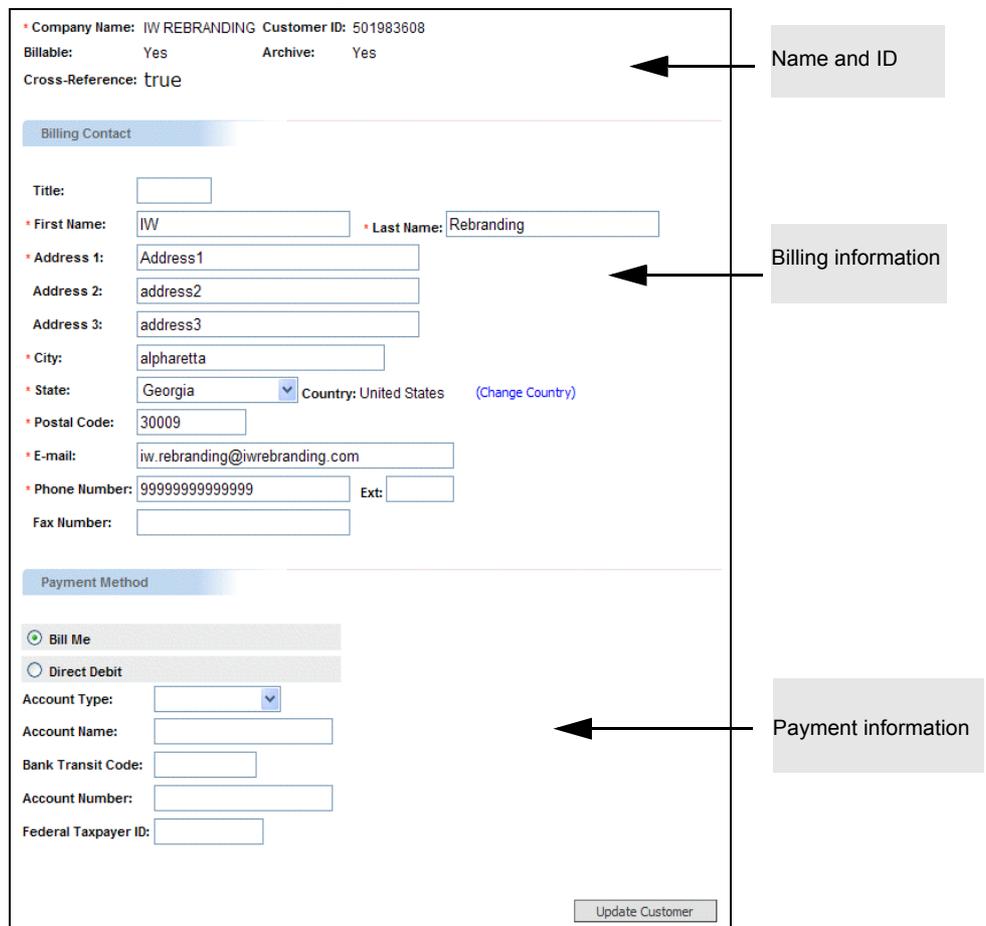
To edit your customer information

- 1 Click the **Administration** tab > **Customer**.

The Customer View window opens.

- 2 Click **Edit Customer**.

The Customer Edit window opens.



The screenshot shows the 'Customer Edit' window for 'IW REBRANDING' (Customer ID: 501983608). The window is divided into three main sections:

- Name and ID:** This section at the top contains fields for 'Company Name' (IW REBRANDING), 'Customer ID' (501983608), 'Billable' (Yes), 'Archive' (Yes), and 'Cross-Reference' (true).
- Billing information:** This middle section is titled 'Billing Contact' and includes fields for 'Title', 'First Name' (IW), 'Last Name' (Rebranding), 'Address 1' through 'Address 3', 'City' (alpharetta), 'State' (Georgia), 'Country' (United States), 'Postal Code' (30009), 'E-mail' (iw.rebranding@iwrebranding.com), 'Phone Number' (9999999999999999), 'Ext.', and 'Fax Number'.
- Payment information:** This bottom section is titled 'Payment Method' and includes radio buttons for 'Bill Me' (selected) and 'Direct Debit'. Below these are fields for 'Account Type', 'Account Name', 'Bank Transit Code', 'Account Number', and 'Federal Taxpayer ID'.

An 'Update Customer' button is located at the bottom right of the form.

- 3 Make your changes.

- 4 Click **Update Customer**.

Scheduling Documents

Individuals assigned the Customer Admin role can create schedules for the hold and release of documents from GXS. This capability helps control document flow during system downtimes.

Documents can be held for a specific time period and released automatically, or they can be held and released automatically on a recurring basis to accommodate scheduled downtimes; for example, every Sunday from 2 a.m. to 3 a.m.

- “Viewing a Document Scheduler Configuration” on page 113
- “Adding a Document Scheduler Configuration” on page 113
- “Editing a Document Scheduler Configuration” on page 115
- “Deleting a Document Scheduler Configuration” on page 115
- “Viewing Audit History for Document Scheduler Configurations” on page 116

Viewing a Document Scheduler Configuration

To view a document schedule

- 1 Click the **Administration tab > Document Scheduler**.

The Document Scheduler Configuration List page opens and lists all configurations for the account (PSN).

Account (PSN) Configuration							View	Add	Edit	Delete	
	ID	Name	Description	Customer ID	Customer Name	Type	Status				
<input type="radio"/>	1349	Eastern Region	Sales Report	501982393	LC GENERIC CUSTOMER	Recurring	Active	View	Add	Edit	Delete

Select the configuration you want to view.

Click to view the configuration details.

- 2 Select the configuration you want to view > click **View**.

The Document Scheduler Configuration View page opens.

Click to return to Document Scheduler List page.

Name: Single PSN HoldTime Range

Description: Test holding.

Status: Active

PSNs: 412904062

Time: Range
 Start 01/12/2009 07:30:00
 End 01/12/2009 09:15:00

Time Zone: America/New_York

Audit History table (see "Viewing Audit History for Document Scheduler Configurations" on page 116).

Audit History			
Event	DateTime	User	Description
Modified	01/12/2009 09:08:41	lcrumadm	[ID: 1221][Name: Single PSN HoldTime Range][Description: Test holding.] [Active: true][Time: Range][Start: 01/12/2009 07:30:00][End: 01/12/2009 09:15:00] [TimeZone: America/New_York][Target IDs: 412904062]
Modified	01/09/2009 10:28:16	lcrumadm	[ID: 1221][Name: Single PSN HoldTime Range][Description: Test holding.] [Active: true][Time: Range][Start: 01/09/2009 07:30:00][End: 01/09/2009 08:45:00] [TimeZone: America/Los_Angeles][Target IDs: 412904062]

3 Review the information about the schedule for the hold and release of documents.

4 Click **Back** to return the Document Scheduler List page.

Note: You can view an audit history that lists all changes to the configuration (see "Viewing Audit History for Document Scheduler Configurations" on page 116).

Adding a Document Scheduler Configuration

Documents for more than one account (PSN) can be included in a configuration.

To add a document scheduler configuration

1 Click the **Administration tab > Document Scheduler**.

The Document Scheduler Configuration List page opens.

2 Click **Add**.

3 Type or select information about how you want to control the hold and release of documents (see “Add/Edit Document Scheduler Field Descriptions” on page 115).

The screenshot shows a configuration window for document scheduling. On the left, there are four callout boxes with arrows pointing to specific fields in the window:

- Callout 1:** "Type a name and the reason documents are being scheduled." points to the *Name: and *Description: fields.
- Callout 2:** "Select a Status." points to the *Status: field, which has radio buttons for Active and Inactive (selected).
- Callout 3:** "Select one or more accounts (PSNs) to which the configuration applies." points to the *PSNs: field, which contains the value 412904062.
- Callout 4:** "Select when to begin and end the hold and release document schedule." points to the *Time: field, which has radio buttons for Range (selected) and Recurring. The Range section has Start and End date and time pickers.

Below the *Time: field, there are two more callouts:

- Callout 5:** "Range—Date/ time to start/end the schedule." points to the Range Start and End date and time pickers.
- Callout 6:** "Recurring—Date/ time to start/end a recurring schedule." points to the Recurring Start and End date and time pickers.

At the bottom of the window, there is a *Time Zone: dropdown menu set to "Europe/Madrid -- Central European Time [GMT: 1:00]". Below the dropdown are "Save Configuration" and "Cancel" buttons. A callout box at the bottom center says "Select the time zone." with an arrow pointing to the dropdown menu.

4 Click **Save Configuration** or click **Cancel** to cancel all entries. Documents are placed on hold based on the information you specify.

Add/Edit Document Scheduler Field Descriptions

In this Field...	Type or Select
Name	Descriptive name for the document scheduler configuration.
Description	Reason the documents are being scheduled.
Status	Active or Inactive
PSN	Account (PSN) for which documents are being scheduled. Note: Press the Ctrl key to select more than one account (PSN).
Date and Time	Date and Time to begin and end the document schedule. Range —Select a Start and End date and time. <ul style="list-style-type: none"> ■ Start—Select a document schedule starting date from the calendar or type the values directly using the mm/dd/yyyy format. ■ From the drop-down list, select the scheduled starting time. Note: Military time is listed in 15-minute increments with 00:00 representing midnight. ■ End—Select a schedule ending date from the calendar or type the values using the mm/dd/yyyy format. ■ From the drop-down list, select the scheduled ending time. Note: Military time is listed in 15-minute increments with 00:00 representing midnight. Recurring —Select the Start and End day and time for documents to be held and released on a recurring basis, such as every Sunday from 1 a.m. to every Monday at 3 a.m.
Time Zone	Time zone in which the dates and times in the configuration are to take place.

Editing a Document Scheduler Configuration
To edit a document scheduler configuration

- 1 Click the **Administration tab > Document Scheduler**.
The Document Scheduler Configuration List page opens.
- 2 Select a configuration > **Edit**.
- 3 Modify information about the document schedule (see “Add/Edit Document Scheduler Field Descriptions” on page 115).
- 4 Click **Save Configuration** or click **Cancel** to cancel all edits.

Deleting a Document Scheduler Configuration
To delete a document scheduler configuration

- 1 From the **Administration tab > Document Scheduler**.
The Document Scheduler Configuration List page opens.
- 2 Select the configuration you want to delete > click **Delete**.
A page that shows the document scheduler configuration opens.

3 Review the document scheduler configuration carefully before deleting it.

Name: Single PSN HoldTime Range

Description: Test holding.

Status: EXPIRED

PSNs: 412904062

Time: Range
 Start 01/12/2009 07:30:00
 End 01/12/2009 09:15:00

***Time Zone:** America/New_York

Audit History			
Event	DateTime	User	Description
Modified	01/12/2009 09:08:41	lcrumadm	[ID: 1221][Name: Single PSN HoldTime Range][Description: Test holding.] [Active: true][Time: Range][Start: 01/12/2009 07:30:00][End: 01/12/2009 09:15:00] [TimeZone: America/New_York][Target IDs: 412904062]

4 Click **Delete Configuration**.

Viewing Audit History for Document Scheduler Configurations

So that you can see who modified information about document schedules, each configuration lists an audit history at the bottom of the View, Edit, and Delete pages.

To view the audit history for scheduled documents

1 Click the **Administration tab > Document Scheduler**.

The Document Scheduler Configuration List page opens.

2 Select a configuration > click **View**, **Edit**, or **Delete**.

The Document Scheduler Configuration page opens.

3 Scroll to the bottom of the page.

The Audit History table is displayed beneath the selected configuration (see “Document Scheduler Audit History Field Descriptions” on page 117).

Audit History			
Event	DateTime	User	Description
Modified	10/10/2006 17:47:28	pbolaki_adm	[Name: Test This account][Description: Magic/ZZ hold][Active: false][Time: Immediately][Target IDs: 412906247]
Modified	10/04/2006 17:59:49	pbolaki_adm	[Name: Test This account][Description: Magic/ZZ hold][Active: true][Time: Immediately][Target IDs: 412906246,412906247]
Modified	10/04/2006 18:00:10	pbolaki_adm	[Name: Test This account][Description: Magic/ZZ hold][Active: true][Time: Immediately][Target IDs: 412906247]
Created	09/27/2006 10:56:20	rmkadmin	[Name: Test This account][Description: Magic/ZZ hold][Active: true][Time: Immediately][Target IDs: 412906246,412906247]
Modified	09/27/2006 16:11:51	rmkadmin	[Name: Test This account][Description: Magic/ZZ hold][Active: false][Time: Immediately][Target IDs: 412906246,412906247]

Document Scheduler Audit History Field Descriptions

Column	Description
Event	Action taken—Created, modified, or deleted.
Date Time	Date and time of the action.
User	User ID of the person who took the action.
Description	Describes the configuration at the time of the modification.

Maintaining Event Notification

An event is any action performed on a document as it travels through the GXS network.

Event notification configurations ensure emails are sent to you and/or your trading partners when documents do not process successfully. After receiving the emails, you or your trading partners can take corrective action.

You can define event notification configurations for events that are related to documents, changes to archive settings, and documents for which FA monitors have been set up (if your company subscribes to the FA premium service).

- “About Event Notification” on page 117
- “Setting Up Document or Archive Event Notifications” on page 121
- “Setting up Event Notifications for FA Events” on page 125
- “Setting Up Trading Partner Address Books” on page 130
- “Modifying Email Messages for Event Notification” on page 129
- “Defining Distribution Lists” on page 133
- “Disabling Event Notification Configurations” on page 133
- “Unsubscribing from Event Notification for an Event Group” on page 134

About Event Notification

These topics are critical to understanding event notification:

- “Events, Event Types, and Event Groups” on page 117
- “Sample Emails” on page 118
- “Email Frequency” on page 119
- “Example of Event Notification Processing” on page 119
- “Setup Process for FA Reconciliation” on page 120
- “FA Settings and Corresponding FA Event Groups” on page 121

Events, Event Types, and Event Groups

An event is any action performed on a document as it travels through the GXS network.

An *event type* is a specific event, such as an invalid receiver.

An event group is a set of related events, such as document errors. Many event types can exist within an event group. For example, the data validation event group includes these event types:

- Invalid Sender
- Processing error
- Communications error
- Invalid Receiver
- Inbound rule error
- Transit parse error
- Parse error
- Routing rule error
- Transit processing error

Sample Emails

Here is a sample email for document and archive events: It was sent because a document could not be delivered.

Type of error, such as invalid receiver →

Recommended actions to resolve the error →

Document-specific information →

```

From: ces@inovis.com [mailto:ces@inovis.com]
Sent: Tuesday, August 08, 2006 11:42 PM
To: John Smith
Subject: Invalid Receiver

To our valued customer,

The document(s) referenced below has been rejected by Inovisworks due to an Invalid Receiver ID.

- If you are a sending customer, please submit a request online at www.inovisworks.net to have your Trading ID added to the Inovis Network. Please provide the Company Name, Trading ID, and Network.

- If you are a sending VAM, please contact Inovis Customer Support by phone at 1-877-446-6847 option 1, 1, 1 or by email and provide Company Name, Trading ID, and Network.

- If you are a receiving customer, please add your Trading ID to your account or log a case online through www.inovisworks.net and resend the document.

Document Information:

Session ID = [3:73285213]
Receiver Alias/Qualifier = 00013003953ABCINC-FVB/ZZ
Document ID =200805714
ICN = 00000064
Alias/Qualifier = CAC01.CAC01001/ZZ
                    
```

Here is a sample email for FA-related events. It was sent because a TLM warning timeout occurred.

Type of error →

Document-specific information. →

Link to unsubscribe from event notification →

```

From: alphatest1@pc2.com [mailto:alphatest1@pc2.com]
Sent: Friday, July 20, 2007 11:34 AM
To: Lyle Crum
Subject: TLMTIMEOUTWARNINGCUSTOMER

TLM Warning Timeout: TLM associated transaction not received for the following transactions:
=====
ICN                                N/A
INOVIS_DOC_ID                      265310126
EDITRID                             26309909
SENDER                              ZZ/EVN20
ORIGINATING_ACCOUNT_NAME           N/A
ORIGINATING_APP_ASSIGN_NUM         12286
ORG_CTRL_NUM                       000000111/13211510/13311502
RECEIVER                            ZZ/EVN13
RET_ACCOUNT_NAME                    N/A
RET_DOC_TYPE                         810
RECONCILIATION_TIMEOUT              2007-07-20 11:31:47 EDT
TLM_MONITOR_ID                      3112
CATEGORY_TAG_VALUE                  N/A

Thank you for using Inovis,
Inovis Customer Support
11720 AmberPark Drive
Alpharetta, GA 30004
+1.877.446.6847
www.inovis.com

This message is intended for the addressee(s) only and may contain confidential and/or proprietary information. If you are not the intended recipient, please notify the sender and destroy the message. Unauthorized use or disclosure may be unli to this message.

You are receiving this email because your email address was provided as a recipient for emails sent for notif events occur in Inovisworks for EVENT NOTIFICATION CO 20. If you wish to no longer receive emails related to use the link below. http://iworks.qa.itlogon.com/css/unsubscribe.do?ref=bf1e667-3461-11dc-0c90-fba998d71bd0
                    
```

The bottom of each email contains a link that allows customers to unsubscribe from event notification (see “Unsubscribing from Event Notification for an Event Group” on page 134).

Instead of using the standard GXS emails, customer can define special text for the emails they send (see “Modifying Email Messages for Event Notification” on page 129).

Email Frequency

You determine how often emails are sent. For example, if you set the frequency to ten minutes and document errors occur, GXS sends an email to the email addresses you specify every ten minutes.

If many errors of the same type occur, GXS sends one email that lists all the errors.

If no errors occur, GXS does not send an email.

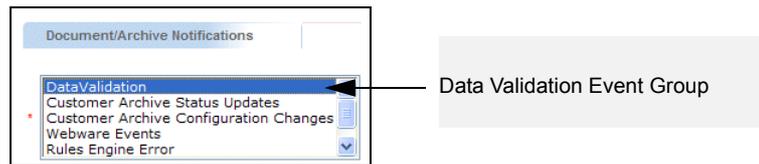
Example of Event Notification Processing

This example describes how Inoivisworks processes event notification configurations.

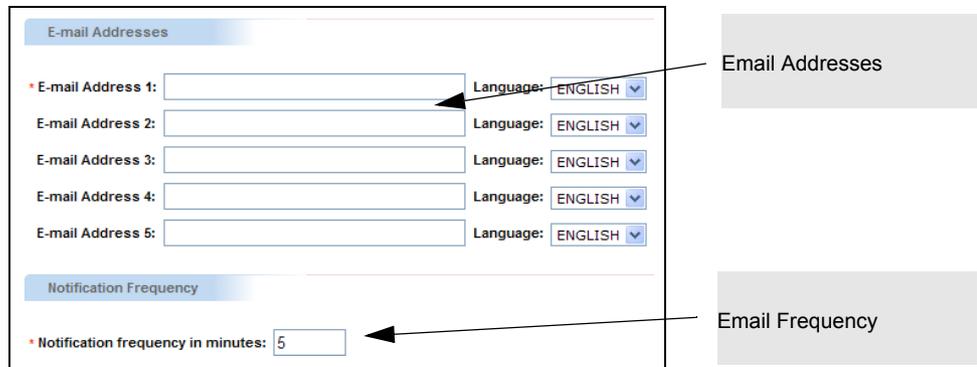
Your company wants to be notified when data validation errors occur on documents you send to your trading partners.

To ensure you are notified, you must set up an event notification configuration for the data validation event group.

For data validation errors, you create an event notification configuration called Admin Notices. It indicates you want Inoivisworks to monitor any errors in the data validation event group.



You specify the email addresses that are to be notified when data validation errors occur and indicate you want emails to be sent every 20 minutes.



SAMPLE PROCESSING

Between 1:00 p.m. and 1:15 p.m., these errors (events) occur in your documents.

- Invalid Sender
- Parse Error
- FA Warning

At 1:20 p.m., Inovisworks scans the event notification configurations called Admin Notices and identifies the first two events. (The Data Validation event group includes these errors: invalid sender and parse error.)

For the events, Inovisworks creates text for an email for the invalid receiver and parse errors (Data Validation event group).

Inovisworks sends an email to each of the email addresses listed in the Admin Notices event notification configuration.

Note: Because the FA Warning error is not monitored by an event notification configuration, it is ignored by Inovisworks.

Setup Process for FA Reconciliation

If your company subscribes to the FA premium service, you must ensure FA monitor configurations contain the appropriate settings before setting up enhanced notification configurations.

Inovisworks uses the settings in the FA monitors in combination with the email addresses and other criteria set up in event notification configurations to determine when and where email notifications are to be sent (see “Define Event Notification Settings for FA Monitor Configurations” on page 120).

Optionally, you can “Define Trading Partner Address Books for FA” on page 120.

DEFINE EVENT NOTIFICATION SETTINGS FOR FA MONITOR CONFIGURATIONS

While setting up (or editing) an FA monitor configuration, you must select the appropriate check box to indicate how you want (or how you want your trading partners) to be notified if an exception situation occurs.

- For FA monitor configurations, the Event Notification Settings check boxes indicate event notification emails can be sent to the:
 - Sender of the original document if an FA with an Accepted or Rejected status is received.
 - Sender or receiver of the original document if an FA is not matched to an original document or if an error occurred during FA processing.

Event Notification Settings

Notify if Accepted: Sender of Original Document
Indicates whether acknowledgement rejected alerts will be sent to the sender of the original c

Notify if Not Matched: Sender of Original Document Receiver of Original Document
Indicates whether acknowledgement not matched alerts will be sent to the sender of the origi Notification.

Notify if Rejected: Sender of Original Document
Indicates whether acknowledgement rejected alerts will be sent to the sender of the original c

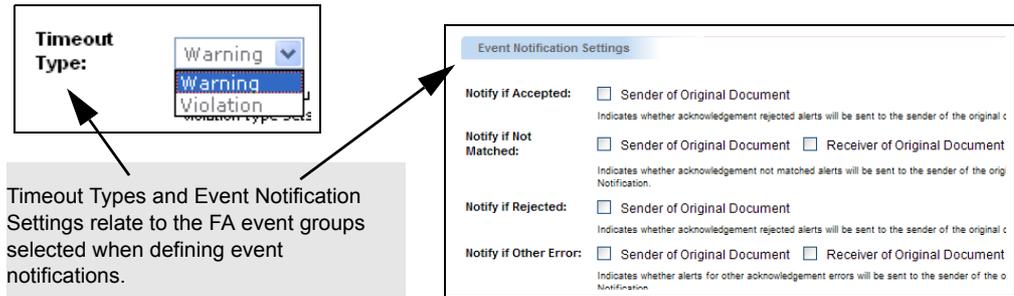
Notify if Other Error: Sender of Original Document Receiver of Original Document
Indicates whether alerts for other acknowledgement errors will be sent to the sender of the o Notification.

DEFINE TRADING PARTNER ADDRESS BOOKS FOR FA

Optionally, you can set up trading partner address books that contain email addresses and contact information. Inovisworks uses the address books when determining which email addresses to use when sending email notifications (see “Setting Up Trading Partner Address Books” on page 130).

FA Settings and Corresponding FA Event Groups

The timeout type and event notification settings defined in an FA reconciliation monitor correspond to specific FA event groups in event notification.



Timeout Types and Event Notification Settings relate to the FA event groups selected when defining event notifications.

The table shows how FA reconciliation settings correspond to FA event groups in event notification.

When these options are selected in an FA monitor configuration...	Use this FA event group when defining email addresses in event notification configurations...	Emails can be sent to...
Timeout Type Settings		
Warning	<ul style="list-style-type: none"> ■ Ack Warning Timeout for Org Doc Sender ■ Ack Warning Timeout for Org Doc Receiver 	<ul style="list-style-type: none"> ■ Sender ■ Receiver
Violation	<ul style="list-style-type: none"> ■ Ack Violation Timeout for Org Doc Sender ■ Ack Violation Timeout for Org Doc Receiver 	<ul style="list-style-type: none"> ■ Sender ■ Receiver
Event Notification Settings		
Notify if Accepted	<ul style="list-style-type: none"> ■ Ack Accepted for Org Doc Sender 	<ul style="list-style-type: none"> ■ Sender
Notify if Not Matched	<ul style="list-style-type: none"> ■ Ack Not Matched for Org Doc Sender ■ Ack Not Matched for Org Doc Receiver 	<ul style="list-style-type: none"> ■ Sender ■ Receiver
Notify if Rejected	<ul style="list-style-type: none"> ■ Ack Reject for Org Doc Sender 	<ul style="list-style-type: none"> ■ Sender
Notify if Other Errors	<ul style="list-style-type: none"> ■ Other Ack Error for Org Doc Sender ■ Other Ack Error for Org Doc Receiver 	<ul style="list-style-type: none"> ■ Sender ■ Receiver

Important: If the receiver is to get event notifications, email addresses must be set up for the events that correspond to the receiver’s FA monitor configuration. The email addresses are defined in an event notification configuration (see “Setting up Event Notifications for FA Events” on page 125).

Setting Up Document or Archive Event Notifications

Document and archive events are related to document flow and changes to archive settings.

- “Adding a Document or Archive Event Notification” on page 121
- “Editing Event Notification Configurations” on page 125
- “Viewing Event Notification Configurations” on page 125
- “Deleting Event Notification Configurations” on page 125

Adding a Document or Archive Event Notification

Event notification configurations can apply to

- All accounts (PSNs), trading IDs, and group IDs associated with a customer ID

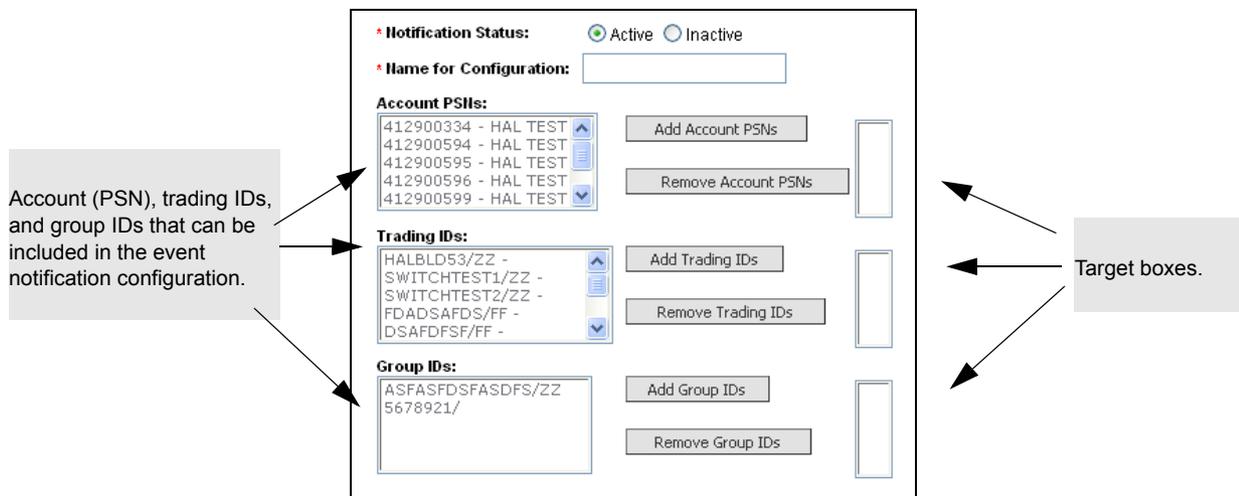
- Selected accounts (PSNs), Trading IDs, and Group IDs associated with the customer ID

Note: As part of this procedure, information can be selected and moved from a source box on the left side of a page to a target box on the right side of a page. If you do not select any values, the configuration applies to all account (PSNs), trading IDs, and group IDs.

To set up a document or archive event notification configuration

- 1 Click the **Administration** tab > **Event Notification** > **Configure Event Notifications** > **Add Document/Archive Notification**.

The Event Notification Add page opens. Only the top part of the page is shown in the following graphic.



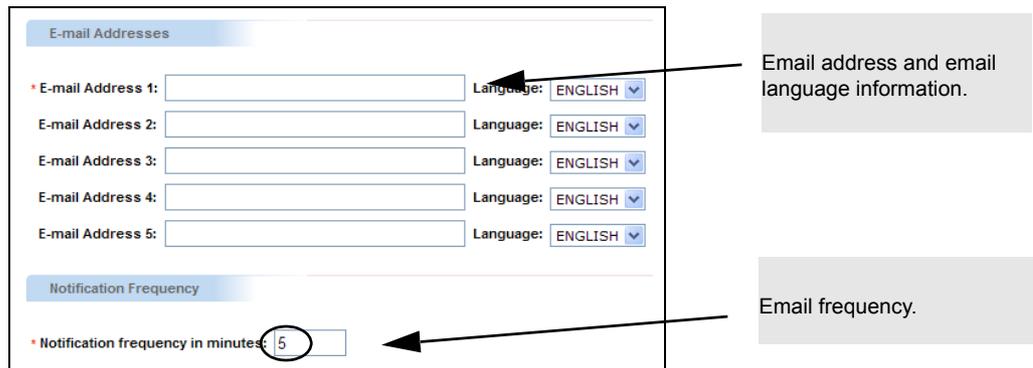
- 2 In Notification Status, indicate the status of the notification, Active or Inactive.
- 3 In Configuration Name, type a name for the notification.
- 4 Select Account PSNs, Trading IDs, and Group IDs to which the configuration is to apply (see “Add/Edit Document/Archive Notification Field Descriptions” on page 124).
- 5 Click the appropriate **Add** button to move the selected items to the target boxes.

Note: If no account (PSNs) or IDs are specified in the target boxes, the configuration applies to all account (PSNs), trading IDs, and group IDs associated with the customer.
- 6 Scroll to Document/Archive Notifications and select the event groups to which the customer wants to apply to the notification.



Note: When exceptions occur, email notifications will be sent for all event types within the selected event groups.

- 7 In Email Addresses, type up to five email addresses to which email notifications are to be sent. In Language, select the language that is to be used in the email. Distribution lists can be used as email addresses (see “Defining Distribution Lists” on page 133).



The screenshot shows a configuration form with two main sections. The top section, titled 'E-mail Addresses', contains five rows. Each row has an input field for an email address and a dropdown menu for the language, all currently set to 'ENGLISH'. The bottom section, titled 'Notification Frequency', contains a single input field for 'Notification frequency in minutes' with the value '5' entered and circled. Two callout boxes on the right side of the form have arrows pointing to the language dropdowns and the frequency input field, respectively.

- 8 In Notification Frequency in Minutes, type the frequency with which the emails are to be sent when errors occur.
- 9 If you do not want to send the standard GXS email, go to step 3 in “Modifying Email Messages for Event Notification” on page 129.
- 10 Click **Add Notification**.

The document/archive event notification configuration is added for the selected customer or account (PSN).

Add/Edit Document/Archive Notification Field Descriptions

Section/Field	Type or Select
*Notification Status	Status of the event notification configuration, Active or Inactive.
*Name for Configuration	Descriptive name of the event notification configuration.
Account PSNs	<p>Accounts (PSNs) to which the event notification configuration applies.</p> <p>To indicate an account (PSN) is to be included:</p> <ol style="list-style-type: none"> 1 In the source box, select the account (PSNs) that are to be included. 2 Click Add Account PSNs. <p>The selected account (PSNs) are moved to the target list box.</p>
Trading IDs	<p>Trading IDs to which the event notification configuration applies.</p> <p>To indicate a trading ID is to be included:</p> <ol style="list-style-type: none"> 3 In the source box, select the trading IDs that are to be included. 4 Click Add Trading IDs. <p>The selected trading IDs are moved to the target list box.</p>
Group IDs	<p>Group IDs, which are based on trading ID, to which the event notification configuration applies.</p> <p>To indicate a group ID is to be included:</p> <ol style="list-style-type: none"> 5 In the source box, select the group IDs that are to be included. 6 Click Add Group IDs. <p>The selected group IDs are moved to the target list box.</p>
*Document/Archive Notifications	<p>Document and archive events to which the event notification configuration applies, including:</p> <ul style="list-style-type: none"> ■ Data validation errors ■ Archive status updates and changes
*Email Addresses	Up to five email addresses to which email notifications will be sent if the conditions specified in the configuration are met.
Language	Language, such as English or Chinese, that is to be used when the email is sent to the email address.
*Notification Frequency in Minutes	<p>Amount of time, in minutes, after which Inovisworks will send email notifications to the addresses specified in “*Email Addresses”</p> <p>Maximum: 9999 minutes (166.65 hours)</p>
Email Formatting	Optional. If no selections are made, emails will be sent in the standard GXS email format for document and archive events.
<ul style="list-style-type: none"> ■ Subject Line 	<ul style="list-style-type: none"> ■ Use Default Subject—To use the standard GXS subject line for document or archive events. ■ Use Custom Subject—To use a customer-defined subject line for document or archive events. In the text box, type the subject line.

Section/Field	Type or Select
<ul style="list-style-type: none"> ■ Instructions Line 	<ul style="list-style-type: none"> ■ Yes—To use instruction/solution text that describes how the customer wants to resolve document or archive errors. In the text box, type the instructions. ■ No—To not include instruction/resolution text in the email.
<ul style="list-style-type: none"> ■ Signature Line 	<ul style="list-style-type: none"> ■ Use Default Signature—To use the standard GXS signature at the end of the email. ■ Use Custom Signature—To use a customer-defined signature at the end of the email. In the text box, type the signature.

Editing Event Notification Configurations

If you or your trading partners unsubscribe from event notification, the email address is displayed on the Event Notification Edit page. A note indicates the email address unsubscribed from notification. The field can be edited to add a new email address.

To edit an event notification configuration

- 1 Click the **Administration** tab > **Event Notification** > **Configure Event Notifications**.
- 2 Select the notification > click **Edit**.
- 3 Modify the information as appropriate (see “Add/Edit Document/Archive Notification Field Descriptions” on page 124).
- 4 Click **Update Notification**.

The event notification configuration is updated for the selected customer or account (PSN).

Viewing Event Notification Configurations

To view an event notification configuration

- 1 Click the **Administration** tab > **Event Notification** > **Configure Event Notifications**.
- 2 Select the notification > click **View**.
- 3 Click the list breadcrumb to return to the Event Notification List page.

Deleting Event Notification Configurations

To delete an event notification configuration

- 1 Click the **Administration** tab > **Event Notification** > **Configure Event Notifications**.
- 2 Select the notification > click **Delete** > **OK**.

The event notification configuration is deleted for the selected customer or account (PSN).

Setting up Event Notifications for FA Events

Important: You must subscribe to the premium FA reconciliation service to perform the procedures in this topic. Before you begin, see “Setup Process for FA Reconciliation” on page 120.

FA events are related to warning and violation timeouts.

- “Adding an FA Event Notification Configuration” on page 126
- “Editing Event Notification Configurations” on page 125

- “Viewing Event Notification Configurations” on page 125
- “Deleting Event Notification Configurations” on page 125

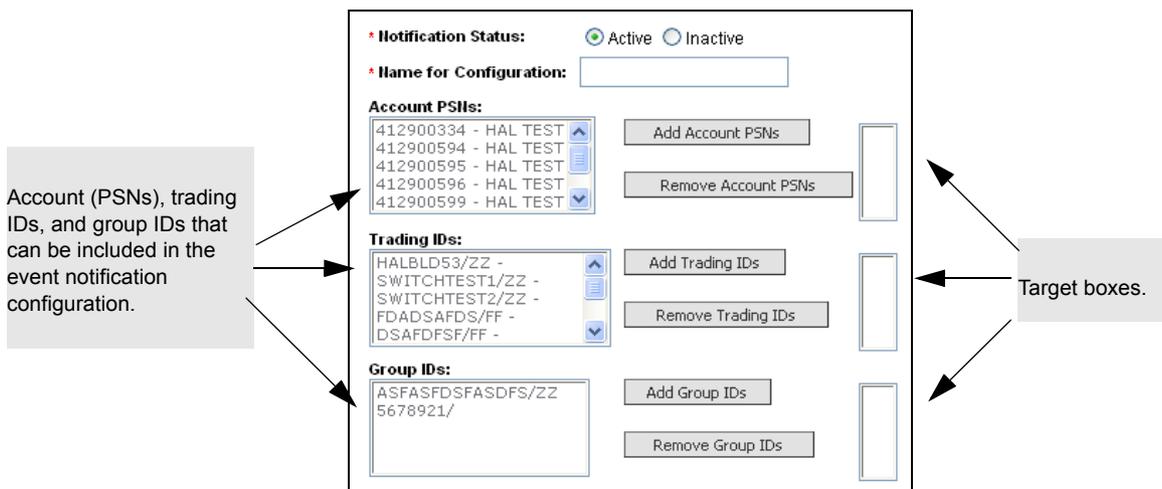
Adding an FA Event Notification Configuration

To set up an FA event notification configuration

Note: Event notifications can be defined at the customer level and applied to all PSNs.

- 1 Click the **Administration** tab > **Event Notification** > **Configure Event Notifications** > **Add TLM/FA Notification**.

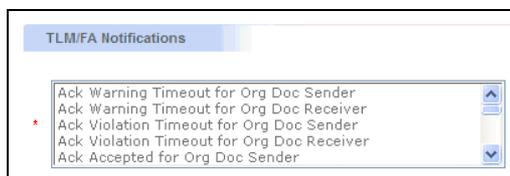
The Event Notification Add page opens. Only the top part of the page is shown in the following graphic.



- 2 Define the status, name, and other information that applies to the configuration:
 - a In Notification Status, indicate the status of the notification, Active or Inactive.
 - b In Configuration Name, type a name for the notification.
 - c Select the Account (PSNs), Trading IDs, and Group IDs to which the configuration is to apply (see “Add/Edit Document/Archive Notification Field Descriptions” on page 124).
 - d Click the appropriate **Add** button to move the selected items to the target boxes.

Note: If no IDs are specified in the target boxes, the configuration applies to all accounts (PSNs), trading IDs, and group IDs associated with the customer.

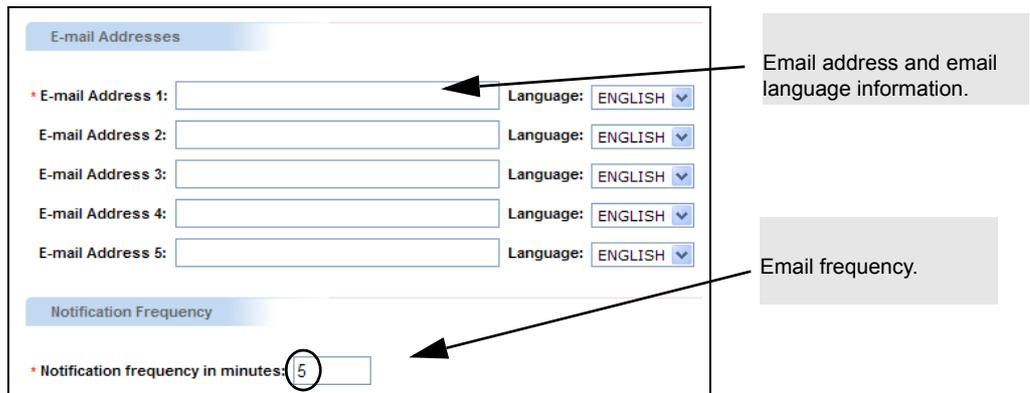
- 3 Scroll to TLM/FA Notifications and select the FA event groups the customer wants to apply to the notification.



Note: When exceptions occur, email notifications will be sent for all event types within the selected event groups.

- 4 In Document Types, select the document types to which the notification is to apply.

- In Email Addresses, type up to five email addresses to which you want to send email notifications. In Language, select the language that is to be used in the email. Distribution lists can be used as email addresses (see “Defining Distribution Lists” on page 133).



The screenshot shows a configuration form with two main sections. The first section, titled "E-mail Addresses", contains five rows. Each row has a text input field for the email address and a dropdown menu for the language, all set to "ENGLISH". The second section, titled "Notification Frequency", contains a single text input field for the notification frequency in minutes, with the value "5" entered. Two callout boxes with arrows point to the first row of the email addresses and the notification frequency field, with labels "Email address and email language information." and "Email frequency." respectively.

- In Notification Frequency in Minutes, type the frequency with which emails are to be sent when errors occur.
- If customers do not want to send the standard GXS email, go to step 3 in “Modifying Email Messages for Event Notification” on page 129.
- Click **Add Notification**.

The TLM/FA event notification configuration is added for the selected customer or account (PSN).

Add/Edit FA Notification Field Descriptions

Section/Field	Type or Select
*Notification Status	Status of the event notification configuration, Active or Inactive.
*Name for configuration	Descriptive name of the event notification configuration.
Account PSNs	<p>Accounts (PSNs) to which the event notification configuration applies.</p> <p>To indicate an account (PSN) is to be included:</p> <ol style="list-style-type: none"> 1 In the source box, select the account (PSNs) that are to be included. 2 Click Add Account PSNs. <p>The selected account (PSNs) are moved to the target list box.</p>
Trading IDs	<p>Trading IDs to which the event notification configuration applies.</p> <p>To indicate a trading ID is to be included:</p> <ol style="list-style-type: none"> 3 In the source box, select the trading IDs that are to be included. 4 Click Add Trading IDs. <p>The selected trading IDs are moved to the target list box.</p>
Group IDs	<p>Group IDs, which are based on trading ID, to which the event notification configuration applies.</p> <p>To indicate a group ID is to be included:</p> <ol style="list-style-type: none"> 5 In the source box, select the group IDs that are to be included. 6 Click Add Group IDs. <p>The selected group IDs are moved to the target list box.</p>
Document Type	Document types to which the event notification configuration applies.
*Email Addresses	Up to five email addresses to which email notifications will be sent if the conditions specified in the configuration are met.
Language	Language, such as English or Chinese, that is to be used when the email is sent to the email address.
*Notification Frequency in Minutes	<p>Amount of time, in minutes, after which Inovisworks will send email notifications to the addresses specified in “*Email Addresses.”</p> <p>Maximum: 9999 minutes (166.65 hours)</p>
Email Formatting	Optional. If no selections are made, emails will be sent in the standard GXS email format for FA events.
<ul style="list-style-type: none"> ■ Subject Line 	<ul style="list-style-type: none"> ■ Use Default Subject—To use the standard GXS subject line for FA events. ■ Use Custom Subject—To use a customer-defined subject line for FA events. In the text box, type the subject line.
<ul style="list-style-type: none"> ■ Instructions Line 	<ul style="list-style-type: none"> ■ Yes—To use instruction/solution text that describes how the customer wants to resolve FA errors. In the text box, type the instructions. ■ No—To not include instruction/resolution text in the email.

Section/Field	Type or Select
<ul style="list-style-type: none"> ■ Signature Line 	<ul style="list-style-type: none"> ■ Use Default Signature—To use the standard GXS signature at the end of the email. ■ Use Custom Signature—To use a customer-defined signature at the end of the email. In the text box, type the signature.
<ul style="list-style-type: none"> ■ Document Information 	<ul style="list-style-type: none"> ■ Use Default Document Information—To include all information that is relevant to the document event in the email. ■ Use Limited Document Information—To include a limited set of information that is relevant to the document event in the email.
Notification Options	
Notification Groupings	How you want emails to be sent: <ul style="list-style-type: none"> ■ Send one email to my company and one email to my trading partner’s company. Default. ■ Send a summary email to my company and one email to my trading partner’s company. <p>Note: Summary emails include errors of the same type for multiple trading partners.</p> <ul style="list-style-type: none"> ■ Send a summary email to my company, an email to my company for each trading partner, and one email to my trading partner’s company.

Modifying Email Messages for Event Notification

Optionally, you can modify the contents of the standard emails that GXS sends for all events. The email formats for document/archive and FA events are different (see “Sample Emails” on page 118).

To modify the default email messages

Note: Event notifications can be defined at the customer level and applied to all PSNs.

- 1 Click the **Administration** tab > **Event Notification** > **Configure Event Notifications** > **Add Document/Archive Configuration or Add TLM/FA Notification**.
- 2 Select the notification > click **Edit**.

3 Scroll to email Formatting at the bottom of the page.

If you want to use specialized text in emails:

- 1 Select the appropriate option.
- 2 Type the special text in the text boxes.

Note: Inovisworks saves text typed in the text boxes when you click **Update Notification**. Unless the appropriate option is selected, the text does not appear in emails.

- 4 Select the appropriate option and type custom information for the message’s subject, instruction/solution, and signature lines (see “Email Formatting” on page 128). If no information is provided, the default GXS email messages are sent to you and/or your trading partners.
- 5 For FA notifications, indicate if all information about a document is to display in the email, or if only limited information is to display.

Note: The table shows all information that can be displayed in emails for FA-related events. If the Use Limited Document Information option is selected, the information in the second column does not display.

All Document Information	
Originating account	Interchange control number
FA monitor name	Document ID
Originating application assigned number	EDI trading ID
Sender	Originating control number
Receiver	Monitor ID
	Return document type
Name of receiver’s account	
Reconciliation timeout	

- 6 For FA notifications, select the email option that describes how you want Inovisworks to send email notifications when errors occur.
- 7 Click **Update Notification**.
Note: The contents of selected email are changed.

Setting Up Trading Partner Address Books

If you subscribe to FA, you can define address books for groups of trading partners.

Inovisworks uses the address books as a source of email addresses when determining which email addresses to use when sending email notifications.

You do not need to associate address books with event notification configurations.

- “Adding an FA Event Notification Configuration” on page 126
- “Editing Trading Partner Address Books” on page 132
- “Editing Trading Partner Address Books” on page 132
- “Deleting Trading Partner Address Books” on page 133

Adding Trading Partner Address Books

You can define multiple address books, but a trading ID can exist in just one address book.

To add trading partner address books for FA customers

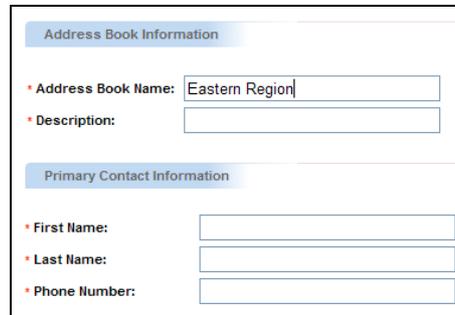
Note: Event notifications can be defined at the customer level and applied to all PSNs.

- 1 Click the **Administration** tab > **Event Notification** > **Manage Trading Partner Addresses**.

The Address Book List page opens.

- 2 Click **Add**.

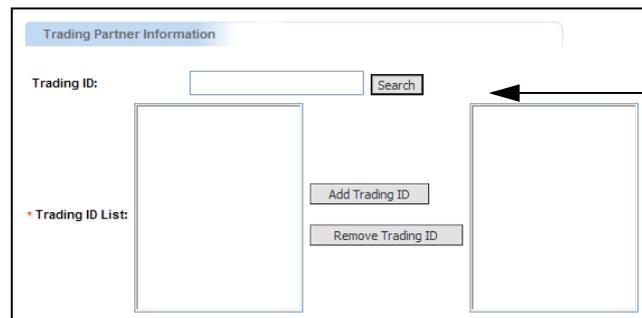
The Address Book Add page opens. Only the top part of the page is shown in the graphic.



- 3 Type the name, description, and trading partner contact information for the address book (see “Add/Edit Address Book Field Descriptions” on page 132).

- 4 In Trading ID, type all or part of a trading ID and click **Search**.

Note: You can use an asterisk (*) as a wild card in the Trading ID field. For example, typing “*acme*” and clicking **Search** would give you a list of all trading IDs with “acme” in the name.



To find trading IDs:
3 Type all or part of a trading ID.
4 Click **Search**.

The trading IDs for interchange level trading partners are listed in the source box.

- 5 In the source box, select the Trading IDs you want to include in the address book.
- 6 Click the appropriate **Add** button to move the selected items to the target boxes.
- 7 In Email Addresses, type up to five email addresses to include in the address book.
- 8 Click **Add**.

The trading partner address book is added for the selected customer.

Add/Edit Address Book Field Descriptions

Section/Field	Type or Select
Address Book Entry Information	
*Address Book Name	Name of the address book for the trading partner.
*Description	Descriptive information about the address book.
Primary Contact Information	
*First Name	First name of the trading partner's contact person.
*Last Name	Last name of the trading partner's contact person.
*Phone Number	Telephone number of the trading partner's contact person.
Trading Partner Information	
Trading ID	<p>Trading IDs for interchange level trading partners.</p> <p>To search for trading IDs:</p> <ol style="list-style-type: none"> 1 Type all or part of a trading ID. 2 Click Search. <p>The trading IDs for interchange level trading partners are listed in the selection list.</p> <p>Note: You can use an asterisk () as a wild card. For example, typing "**acme*" and clicking Search would give you a list of all trading IDs with "acme" in the name</p>
*Trading ID List	<p>Trading IDs for interchange level trading partners that can be added to the configuration.</p> <p>To associate trading IDs with the address book:</p> <ol style="list-style-type: none"> 3 Select one or more trading IDs. 4 Click Add Trading ID. <p>The selected trading IDs are moved from the selection list to the target list.</p> <p>To remove trading IDs from the address book:</p> <ol style="list-style-type: none"> 5 Select one or more trading IDs from the target list. 6 Click Remove Trading ID. <p>The selected trading IDs are moved from the target list to the selection list.</p>
Email Addresses	
*Email Address 1—5	Type up to five email addresses for the trading partner.

Editing Trading Partner Address Books

To edit a trading partner address book

- 1 Click the **Administration** tab > **Event Notification** > **Manage Trading Partner Addresses**.
- 2 Select the address book > click **Edit**.

- 3 Modify the information as appropriate (see “Add/Edit Address Book Field Descriptions” on page 132).
- 4 Click **Edit** > **OK**.

The address book is updated for the selected customer or account (PSN).

Viewing Trading Partner Address Books

To view a trading partner address book

- 1 Click the **Administration** tab > **Event Notification** > **Manage Trading Partner Addresses**.
- 2 Select the address book > click **View**.
- 3 Click the list breadcrumb to return to the Event Notification List page.

Deleting Trading Partner Address Books

To delete a trading partner address book

- 1 Click the **Administration** tab > **Event Notification** > **Manage Trading Partner Addresses**.
- 2 Select the address book > click **Delete** > **OK**.

The event notification configuration is deleted for the selected customer or account (PSN).

Defining Distribution Lists

Because distribution lists provide an easy way to send emails to a group of people, GXS recommends you create distribution lists for event notification.

Distribution lists offer these advantages:

- One list used to alert a group of people
- You can add or delete names from the list
- After the list is specified in event notification, the list does not need to be modified in Inovisworks.

To define distribution lists

- Depending on your company policy, either:
 - Create a distribution list using your email program.
 - Contact your email administrator to request a distribution list be created.

Note: If the email address of a distribution list unsubscribes from event notification, all addresses on the distribution list will no longer be notified of events.

Disabling Event Notification Configurations

To disable an event notification configuration

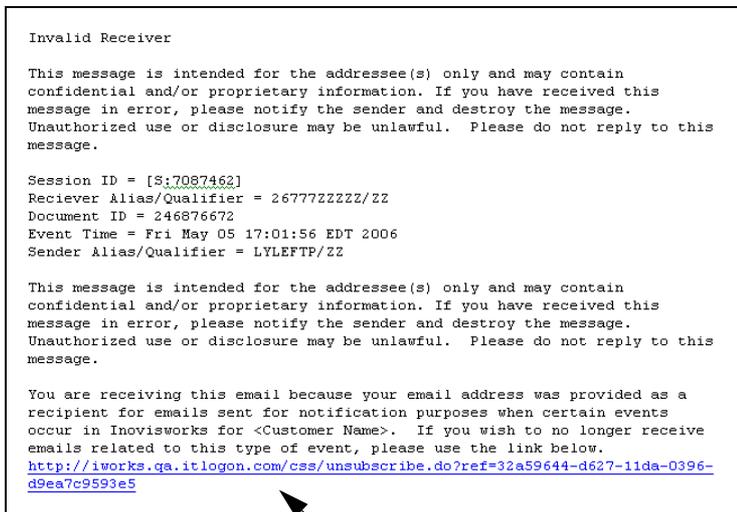
- 1 Click the **Administration** tab > **Event Notification** > **Configure Event Notifications**.
- 2 Select the notification > click **Edit**.
- 3 In Notification Status, change the status to Inactive.
- 4 Click **Edit Notification**.

The event notification configuration is updated.

Unsubscribing from Event Notification for an Event Group

To unsubscribe from event notification for an event group

- 1 From an email received from GXS, go to the bottom of the email and click the link.



Click link to stop receiving emails for an event group.

- 2 Type the email address to remove > click **Unsubscribe**.



Note: If the email address of a distribution list unsubscribes from event notification, all addresses on the distribution list will no longer be notified of events.

- 3 A confirmation message displays. You will:
 - Receive a confirmation email stating you have been unsubscribed from event notification.
 - Stop receiving event notification emails for the event group.

Changing Your Password

To change your password

- 1 Click the **Administration** tab > **Password**.

The change password page opens.

- 2 Click **Change Password**.

In this field:	Type or select...
Password	Your current password.

In this field:	Type or select...
New Password	Your new password.
Confirm New Password	Your new password again.

3 Click **Change Password**.

A message lets you know your password is changed.

4 Click **Continue** and the main Change Password page opens.

Maintaining Trading Partners

When you exchange documents with trading partners on Inovisworks, Inovisworks automatically creates a relationship between your trading ID/qualifier and your trading partner's trading ID/qualifier.

If you want to exchange documents with trading partners that use a different value added network (VAN), use Inovisworks to create the relationship between your trading ID/qualifier and a trading partner's ID/qualifier.

- "Registering and Adding a Trading Partner" on page 135
- "Requesting GXS Set Up a Trading Relationship" on page 138
- "Viewing a Trading Partner Relationship" on page 138
- "Deleting a Trading Partner Relationship" on page 138

Registering and Adding a Trading Partner

If your trading partners use another VAN, their trading IDs/qualifiers might not exist on Inovisworks. To create the relationship between your trading ID/qualifier and your partner's trading ID/qualifier, you must register the trading partner on Inovisworks.

Important: Before you begin this procedure, be sure you know the name of the network used by your trading partner.

To register a trading partner on Inovisworks

- 1 Select a single account (PSN).
- 2 Click the **Administration** tab > **Trading Partner**.

The Trading Partner List page shows all trading partners for the selected account (PSN).

The My Trading ID and My Qualifier columns list your trading IDs/qualifiers.

The Partner Trading ID and Partner Qualifier columns list your trading partner's IDs/qualifiers.

trading partner count= 147 View Add Delete

	My Trading ID	My Qualifier	Partner Account (PSII)	Partner Trading ID	Partner Qualifier	Partner Company Name	Provider	Created Date
<input type="radio"/>	KALEL		412901371	BURDELL		GEORGIATECH		Apr 05, 2006 EDT
<input type="radio"/>	000045705		301548898	UN		JICN	ATT	Feb 24, 2006 EST
<input type="radio"/>	000045705		301548906	UN		LOAD1	KLEINS	Feb 24, 2006 EST
<input type="radio"/>	000045705		301548910	UN		LOAD2	AAFET	Feb 24, 2006 EST
<input type="radio"/>	000045705		301548913	UN		LOAD3	ADVANTIS	Feb 24, 2006 EST
<input type="radio"/>	000045705		301548918	UN		LOAD5	CHRYTEST	Feb 24, 2006 EST
<input type="radio"/>	000045705		412901369	UN		SUPERMAN		Apr 25, 2006 EDT
<input type="radio"/>	000045705		412901371	UN		GEORGIATECH		Aug 02, 2006 EDT
<input type="radio"/>	000045705		412901385	UN		SUPERMAN		Aug 01, 2006 EDT
<input type="radio"/>	000045705		412901424	UN		OMNI2 TEST		May 11, 2006 EDT

View Add Delete

Each line represents a relationship between your trading ID/qualifier and your trading partner's trading ID/qualifier.

3 Click **Add**.

The Trading Partner Search page opens. Use this page to determine if your trading partner's information is already registered on Inovisworks.

***Trading ID/Qualifier:**

The system must search for this trading partner. Verify your information and click Search.

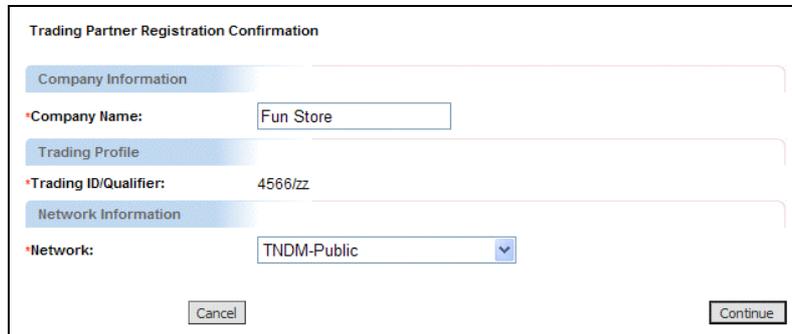
4 Type your trading partner's trading ID and qualifier (optional) > click **Search**.

Important: You must type the trading ID exactly as it appears in Inovisworks. Inovisworks searches for the trading ID/qualifier.

5 Perform the appropriate action:

If the search was...	Do this...
<p>Successful (You see a table that lists trading IDs matching your search criteria.)</p>	<p>6 In the Partner Trading ID/Partner Qualifier column, select the Trading ID/Qualifier.</p>  <p>Link your trading partner's ID/qualifier to one of your trading ID/qualifiers.</p> <p>7 Go to step 12.</p>
<p>Unsuccessful (You see the "This Trading Partner does not exist in Inovisworks" message.)</p>	<p>8 Click Register This Trading Partner.</p>  <p>9 Go to step 10.</p>

10 Type the company name and select the network used by the trading partner from the drop-down list > click **Continue**.



The Trading Partner Registration Confirmation page displays the information you just entered.

11 Click **Register**.

The Trading Partner Relationship page opens.

- 12 In the drop-down list, select the trading ID/qualifier for your company that is to be linked to your trading partner's ID/qualifier. Click **Add Trading Partner**.

The screenshot shows a web interface for adding a trading partner. At the top, a message states "Trading Partner was registered successfully". Below this is a section titled "Trading Partner Relationship". On the left, under "My Account Profile(s)", there is a dropdown menu with "DEFECTTEST/ZZ" selected. On the right, under "Trading Partner Profile", there is a table of information:

Company Name:	FUN STORE
Customer ID:	501982616
Business ID:	412908816
Trading ID/Qualifier:	8989898899/
Network:	IBM Public Network

At the bottom right of the form is a button labeled "Add Trading Partner".

A message indicates the trading partner was added successfully.

- 13 Click **Done**.

The trading partner relationship is added to the Trading Partner List page.

You will receive a confirmation email that reminds you to work with your trading partner to ensure your trading IDs/qualifiers are linked on the trading partner's network.

Requesting GXS Set Up a Trading Relationship

If you register the maximum allowable number of trading partners in a day by following the steps in "Registering and Adding a Trading Partner," you can:

- Wait until the next day to add more trading relationships.
- Call the GXS Solution Center at +1 877.446.6847 and request additional trading relationships be added.

Viewing a Trading Partner Relationship

Trading partners are viewed primarily for information verification.

To view a trading partner

- 1 Select a single account (PSN)
- 2 Click the **Administration** tab > **Trading Partner**.
The Trading Partner List page opens.
- 3 Select the trading partner relationship > click **View**.
The selected Trading Partner's general and contact information opens.
- 4 Click the **list** breadcrumb to return to the Trading Partner List page.

Deleting a Trading Partner Relationship

When you delete a trading partner, you delete the relationship between your company's trading ID/qualifier and the trading partner's trading ID/qualifier.

Note: To re-establish the relationship, just send a document to the trading partner. Inoivisworks automatically recreates the trading partner relationship.

To delete a trading partner relationship

- 1 Select a single account (PSN).

- 2 Click the **Administration** tab > **Trading Partner**.
The Trading Partner list page opens.
- 3 Select the trading partner relationship for deletion > click **Delete**.
The Trading Partner's profile is opened.
- 4 Confirm the deletion > click **Delete Trading Partner Relationship**.
A message confirms that the trading partner relationship has been deleted.
- 5 On the Confirmation page, click **Done** to return to the Trading Partner List page.

Maintaining User Information

To add or maintain a user profile, you must sign on with a Customer Admin role.

- “Adding a User” on page 139
- “Editing a User Profile” on page 140
- “Deleting a User” on page 141

Adding a User

To add a user

- 1 Sign on with a profile that has a Customer Admin role.
- 2 Click the **Administration** tab > **User**.
A list of users opens.
- 3 Click **Add**.
- 4 Type or select the needed Information:

In this field:	Type or Select...
*Login ID	The user's login ID
*Password	A temporary password for the user. The user is prompted to change this when she or he opens Inovisworks.
*Confirm Password	A temporary password for the user.
Password Rule	The rule you need to set for this password. Example: Maximum length, maximum attempts, etc.
Time Zone	The time zone for the user.
*Role	Select one of the following: <ul style="list-style-type: none"> ■ Customer Admin ■ Customer User ■ Account Admin ■ Account User For a description of each role, see “Roles and Functions” on page 19.
*Account (PSN)	Any Accounts (PSNs) assigned to this user. Click the selection box beside each account you need.

In this field:	Type or Select...
Make Cross-Reference Tables Editable	For the Cross-Reference Table premium service: <ul style="list-style-type: none"> ■ If selected (default), the user can edit information in cross-reference tables. ■ Deselect this option if you want the user to be able to view information in cross-reference tables, but not to edit it.
Filter Sender TP Cross-Reference Errors	For the Cross-Reference Table premium service, the sender trading partners for which you want the user to view cross-reference table errors.
Filter Receiver TP Cross-Reference Errors	For the Cross-Reference Table premium service, the receiver trading partners for which you want the user to view cross-reference table errors.

- 5 Type or select the contact information for the user.
First Name, Last Name, and Email Address are required.
- 6 Click **Add User**.
A message confirms the user is added to the account(s).
- 7 On the Confirmation page, click **Done** and the list of users, including the one just added, is shown on the Administration tab.

Viewing a User

To view a user

- 1 Sign on with a profile that has a Customer Admin role.
- 2 Click the **Administration** tab > **User**.
A list of users opens.
- 3 Select a user > click **View**.
User and Contact information opens.
Note: Click **Edit** if you want to edit any of the information (see “Editing a User Profile” on page 140).

Editing a User Profile

To edit a user profile

- 1 Sign on with a profile that has a Customer Admin role.
- 2 Click the **Administration** tab > **User**.
A list of users opens.
- 3 Select the user whose information you want to change > click **Edit**.
- 4 Make changes to the user and contact information.
Note: You cannot change a user’s password.
- 5 Click **Update User**.
A message lets you know the user information is updated.
- 6 On the Confirmation page, click **Done** and the list of users opens.

Deleting a User

The Customer Admin whose name is listed on the account's primary mailbox cannot be deleted.

To delete a user

1 Sign on with a profile that has a Customer Admin role.

2 Click the **Administration** tab > **User**.

The list of users opens.

3 Select the user you want > click **Delete**.

The user profile contact information displays, including Login ID, Role, First Name, and Last Name.

4 Verify the information > click **Delete User**.

A message lets you know the user information has been deleted.

5 Click **Done** and the Administration tab opens listing the remaining users.

Managed Services customers who subscribe to the cross-reference premium service can use Inovisworks to update data in cross-reference tables. The tables, which identify fields with specific values in EDI documents, are used to replace and validate information in documents during transformation. The tables are comma-delimited files.

The following topics describe how to update data in the cross-reference tables and troubleshoot processing errors that occur as a result of changes to the tables.

- “About Cross-Reference Tables” on page 143
- “Viewing the Layout of a Cross-Reference Table” on page 144
- “Working with Data in a Cross-Reference Table” on page 145
- “Troubleshooting Errors in Cross-Reference Tables” on page 148
- “Reprocessing Managed Services Documents” on page 150
- “Granting User Access to Cross-Reference Table Errors” on page 150

About Cross-Reference Tables

Cross-reference tables consist of two parts:

- **Layout**—Applies to the table as a whole, and includes the name and number of columns in the table. While Managed Services customers with the appropriate permissions can view table layouts, GXS staff maintain them (see “Viewing a Cross-Reference Table Layout” on page 144).
- **Data**—Information contained in the rows in a table (see “Working with Data in a Cross-Reference Table” on page 145).

The buttons at the bottom of the View Table Definitions page let you view a table layout. They also let you view or edit the data in a table, export the table data to a spreadsheet program, and update the table so it is available for processing.

Click **View/Edit Data** to view or edit the data in a table.

Click **Export Data** to export table data to a spreadsheet program.

Click **View** to view the layout of a table, including column names.

Click **Update XRef Table** to make updated data available for processing.

Viewing the Layout of a Cross-Reference Table

Use this procedure to view the layout of a cross-reference table. GXS staff maintain the tables for Managed Services customers.

Viewing a Cross-Reference Table Layout

To view a table layout

- 1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

- 2 Select the table layout you want to view > click **View**.

The View Table Definition page opens.

Last Updated By: rmkrdmin Last Updated Time: 07/15/2008 16:34:11

Table Name Store Xref Sample
Code zl_store_xref
Description Store master xref load
Delimiter |

Cancel

Column Name	Minimum Length	Maximum Length	Column Type	Validation Type	Searchable	Max # of Decimal Places
Duns Number	0	10	ALPHA NUMERIC	itemmaster	No	
Branch Number	0	25	VARCHAR	itemmaster	No	
Branch Account	0	25	VARCHAR	itemmaster	No	
GLN	0	25	ALPHA NUMERIC	itemmaster	No	
ALTGLN	0	25	VARCHAR	itemmaster	No	
KEYACCOUNT	0	25	ALPHA NUMERIC	itemmaster	No	
PARTNERDESC	0	50	VARCHAR	itemmaster	No	
LASTUPDATEDATE	0	25	ALPHA NUMERIC	itemmaster	No	
LASTUPDATETIME	0	25	ALPHA NUMERIC	itemmaster	No	

- 3 Click **Cancel** to return to the list page.

Working with Data in a Cross-Reference Table

The data in a cross-reference table can be modified at any time. Individuals with the Customer Admin and Customer User roles can view and edit the data.

- “Viewing Data in a Cross-Reference Table” on page 145
- “Adding Data to a Cross-Reference Table” on page 146
- “Updating Data in a Cross-Reference Table” on page 146
- “Editing Data in a Cross-Reference Table” on page 147
- “Searching for Data in a Cross-Reference Table” on page 147
- “Deleting Data from a Cross-Reference Table” on page 148
- “Exporting Data in a Cross-Reference Table” on page 148

Viewing Data in a Cross-Reference Table

To view data in a cross-reference table

- 1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

- 2 Select the table that contains the data you want to view > click **View/Edit Data**.

The page that opens shows information about the data in the table.

Table Name: SC_Volume_Test_2						
<input type="button" value="Add"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Export Data"/> <input type="button" value="Update %Ref Table"/>						
Total Records: 6						
Views: 20 Rows Page 1 of 1						
	Data Definition ID	Column 1	Column 2	Column 3	Column 4	Column 5
<input type="radio"/>	45874	10:14:31 AM	CQAGBXT	CQAGBXT	CQAGBXT	CQAGBXT
<input type="radio"/>	45875	10:14:35 AM	JCIUULNS	JCIUULNS	JCIUULNS	JCIUULNS
<input type="radio"/>	45879	10:14:51 AM	MUDUEYHS	MUDUEYHS	MUDUEYHS	MUDUEYHS
<input type="radio"/>	45880	10:14:55 AM	GUONOMTF	GUONOMTF	GUONOMTF	GUONOMTF
<input type="radio"/>	45881	10:15:00 AM	AHDBLYYT	AHDBLYYT	AHDBLYYT	AHDBLYYT
<input type="radio"/>	45882	10:15:04 AM	WKOBJDST	WKOBJDST	WKOBJDST	WKOBJDST

- 3 Perform the appropriate action:

If you want to...	Do this...
Return to the Table List page.	<ul style="list-style-type: none"> ■ Click the View Tables Definition breadcrumb.
Add data to the table	<ol style="list-style-type: none"> 4 Click Add. 5 Go to step 3 in “Adding Data to a Cross-Reference Table” on page 146.
Edit data in the table	<ol style="list-style-type: none"> 6 Select the row that contains the data you want to change > click Edit. 7 Modify the information > click Save.
Delete data from the table	<ul style="list-style-type: none"> ■ Select the row of data you want to delete > click Delete.

If you want to...	Do this...
Export data to your computer	<p>8 Click Export Data.</p> <p>9 On the File Download dialog box, click Save.</p> <p>10 Navigate to the directory or folder to download the file.</p> <p>11 Click Save.</p>
Update data in the table to make it available for processing	<p>■ Click Update XRef Table.</p>

Adding Data to a Cross-Reference Table

To add data to a cross-reference table

- 1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

- 2 Select the table that contains the data you want to view > click **View/Edit Data**.

The page that opens shows information about the data in the table.

Table Name SC_Volume_Test_2

Total Records: 6 Views: 20 Rows Page 1 of 1

	Data Definition ID	Column 1	Column 2	Column 3	Column 4	Column 5
<input type="radio"/>	45874	10:14:31 AM	CQAGBXTX	CQAGBXTX	CQAGBXTX	CQAGBXTX
<input type="radio"/>	45875	10:14:35 AM	JCIUULNS	JCIUULNS	JCIUULNS	JCIUULNS
<input type="radio"/>	45879	10:14:51 AM	MUDUEYHS	MUDUEYHS	MUDUEYHS	MUDUEYHS
<input type="radio"/>	45880	10:14:55 AM	GUONOMTF	GUONOMTF	GUONOMTF	GUONOMTF
<input type="radio"/>	45881	10:15:00 AM	AHDBLYYT	AHDBLYYT	AHDBLYYT	AHDBLYYT
<input type="radio"/>	45882	10:15:04 AM	WKOBJDST	WKOBJDST	WKOBJDST	WKOBJDST

- 3 To add information to a row in the table, click **Add**.

The columns in the table display so you can add data to the row in the table.

Name	Value	Data Type	No. Decimal Places	Validation Type
Duns Number	<input type="text"/>	ALPHA NUMERIC		itemmaster
Branch Number	<input type="text"/>	VARCHAR		itemmaster
Branch Account	<input type="text"/>	VARCHAR		itemmaster

- 4 Type the information > click **Add**.

The data is added to the last row in the table.

Updating Data in a Cross-Reference Table

After modifying data in a cross-reference table, you must update the table so Managed Services will use the new or updated information during processing.

Data can be updated from the table list page or from within the table.

To update data in a cross-reference table

- 1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

- 2 Select the table you want to make available to Managed Services for processing.
- 3 Perform the appropriate action:

If you want to...	Do this:
Update the data in the table	<ul style="list-style-type: none"> ■ Click Update XRef Table.
Review the data before updating it	<ol style="list-style-type: none"> 4 Click View/Edit Data. 5 Review the data. 6 Click Update XRef Table.

A message asks if you want to overwrite the data in the existing cross-reference table.

- 7 Click **OK** to overwrite the data in the table.

A message indicates the table has been updated successfully.

Editing Data in a Cross-Reference Table

To edit data in a cross-reference table

- 1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

- 2 Select the table that contains the data you want to view > click **View/Edit Data**.

The page that opens shows information about the data in the table.

- 3 Select the row of data you want to modify > click **Edit**.

The data in the row displays.

- 4 Modify the information > click **Save**.

The data is modified in the table.

Searching for Data in a Cross-Reference Table

If a column in a cross-reference table has been defined as searchable, you can perform a keyword search for data in the column.

Note: Wildcards (*) are supported.

To search for data in a cross-reference table

- 1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

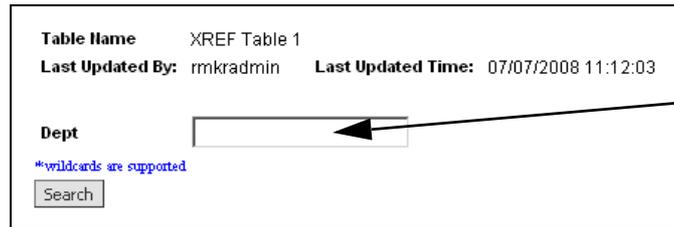
A list of cross-reference tables opens.

- 2 Select the table that contains the data you want to view > click **View/Edit Data**.

Any columns that were defined as searchable display at the top of the page. Below the searchable columns, all data in the table displays.

3 In the search area for the column name, type the word you want to find.

Important: Wildcards (*) are supported.



To find data called "Key" in the column, type ***Key***.

4 Click **Search**.

The table rows that contain columns with the data you searched for display.

You can add or modify information in the table.

Deleting Data from a Cross-Reference Table

To delete data from a cross-reference table

1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

2 Select the table that contains the data you want to delete > click **View/Edit Data**.

The page that opens shows information about the data in the table.

3 Select the row you want to delete > click **Delete**.

A confirmation message asks if you want to delete the data in the table.

4 If you want to delete the data, click **OK**.

The data is deleted from the table.

Exporting Data in a Cross-Reference Table

Use this procedure to export data in a cross-reference table to a spreadsheet program.

To export data in a cross-reference table

1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

2 Select the table that contains the data you want to export > click **Export Data**.

The File Download dialog box opens.

3 Select **Save**.

4 Navigate to the directory or folder to download the file.

5 Click **Save**.

Troubleshooting Errors in Cross-Reference Tables

Managed Services uses maps to transform documents. It also uses maps to access cross-reference tables. Processing errors might occur while Managed Services uses a map to:

- Transform a document from one format to another, or

- Access data in cross-reference tables.

Use this procedure to find and resolve errors generated when Managed Services accesses data in cross-reference tables.

Note: To reprocess documents after correcting errors in cross-reference tables, see “Reprocessing Managed Services Documents” on page 150.

To resolve errors in a cross-reference table

- 1 Click the **Premium Services** tab > click **Cross-Reference** > **Managed Services Cross-Reference Errors**.

A list of errors related to cross-reference tables opens.

The link under Document Type lets you see more information about the cross-reference table with incorrect or missing entries.

Total Records: 2		Views: 20 Rows	Page 1 of 1	First Previous Next Last	
<input type="checkbox"/>	PO	LOWES 006097142/08	BLUELINX 015585404/01	000000030	Errored
<input type="checkbox"/>	PO	LOWES 006097142/08	BLUELINX 015585404/01	000000030	Errored

- 2 To see information about the cross-reference table that contains the error, click the link under Document Type.

A list of document errors opens. As shown in the screen capture, information about one error is contained in three rows in the table

Link to table that contains the error (row 1)

Table Content	Table Name / Error Description / Missing Value
PO-NUMBER	58622252
ITEMMASTER-SOURCE	zl bix itmmast
ITM_ERR_MSG	Item Translation Description not in Tables
REJECTED_ITM	BLX ITEM = 133909 KEY ACCT= 10309
PO-NUMBER	58622252

Description of the error (row 2)

Data that is incorrect in the table (row 3)

- 3 Based on the error (rows 2 and 3), click the table link (row 1) to go to the table with the error.

- 4 Modify the information in the table to resolve the error > click **Save**.

Note: For more information about adding, editing, and deleting data in tables, see “Working with Data in a Cross-Reference Table” on page 145.

- 5 Perform the appropriate action:

If you want to...	Do this?
Reprocess the document that caused the error	<ul style="list-style-type: none"> ■ Go to step 2 in “Reprocessing Managed Services Documents” on page 150.
View the content of the document on TLE	<ul style="list-style-type: none"> ■ Click View Document.

Reprocessing Managed Services Documents

After updating a cross-reference table, you can reprocess documents (flat files) that run against maps in Managed Services. The maps access the cross-reference tables when a document is transformed.

To reprocess documents that use a cross-reference table

- 1 Click the **Premium Services** tab > click **Cross-Reference** > **Managed Services Cross-Reference Errors**.

A list of errors related to cross-reference tables opens.

- 2 After you update a cross-reference table that contains errors, select the table from the list > click **Reprocess**,

The status of the document changes to Pending Reprocess.

Total Records: 1		Views: 20 Rows		Page 1 of 1		First Previous Next Last	
Check All Clear All		Reprocess		Refresh			
	Document Type	Sender	Receiver	ICHI	Status		
<input type="checkbox"/>	PO	LOWES 006097142/08	BLUELINX 015585404/01	000000030	Pending Reprocess		

For reprocessed documents, the error status changes to Pending Reprocess.

- 3 Click **Refresh** to refresh the list of errors.

After reprocessing is complete, the error no longer appears on the list.

Granting User Access to Cross-Reference Table Errors

If you are a Customer Admin, you can grant user access rights to cross-reference table errors by trading partner. The access means users will only be able to see cross-reference errors related to the trading partners assigned to them.

To grant access to cross-reference table errors by trading partner

- 1 Sign on with a profile that has a Customer Admin role.
- 2 Click the **Administration** tab > **User**.
A list of users opens.
- 3 Select the user that you want to grant access to cross-reference tables by trading partner > click **Edit**.
- 4 In Make Cross-Reference Tables Editable, indicate if you want the user to be able to edit information in cross-reference tables.

- 5 In Filter Sender TP Cross-Reference Errors or Filter Receiver TP Cross-Reference Errors, select the trading partners to assign to the user.

The screenshot shows a configuration window with the following elements:

- Make Cross-Reference Tables Editable:** A checkbox that is checked.
- Filter Sender TP Cross-Reference Errors:** A text input field containing the following list of trading partners:
 - 015585404 - BLUELINX
 - 412902210/ZZ - BLUELINX
 - 412902210 - BLUELINX
 - GRSND - BLUELINXA tooltip below the field reads "Hold CTRL to select multiple items."
- Filter Receiver TP Cross-Reference Errors:** A dropdown menu with the following list of trading partners:
 - 006097142 - LOWES
 - FTPF00/ZZ - FTPF00
 - 006097142/01 - NKHUB
 - 00412901015/01 - HOME DEPOT
 - 00412901016/01 - LOWES
 - 006097142/08 - LOWESA tooltip below the dropdown reads "Hold CTRL to select multiple items."

- 6 Click **Update User** to save your changes,.
A message lets you know the user information was updated.
- 7 On the Confirmation page, click **Done** and the list of users opens.

Support Tab

7

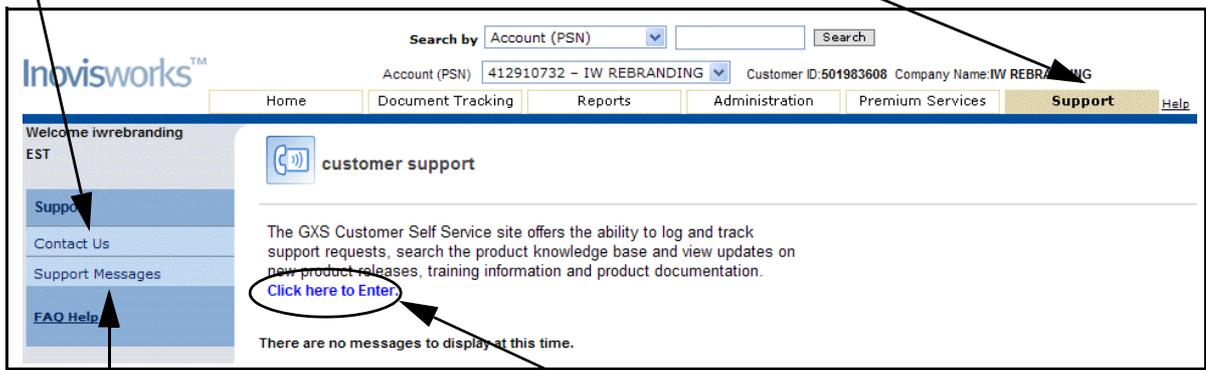
The Support tab gives you access to the Customer Portal Home Page where you can log and track service requests.

- “Viewing the Support Tab” on page 153
- “Viewing the Customer Portal Home Page” on page 153

Viewing the Support Tab

Click to view the GXS Contact List

Click to view the GXS Customer Portal Home Page (see “Viewing the Customer Portal Home Page” on page 153).



Click to view Support Messages

Click to access the GXS Solution Center.

Also use the use the Support tab to:

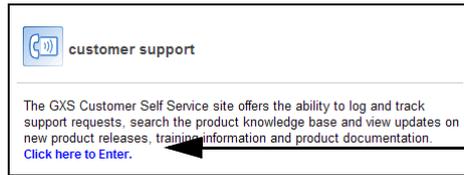
- View GXS Contact Information
- View messages

Viewing the Customer Portal Home Page

See your company’s portal administrator to get your login ID and password. The portal administrator manages accounts and users for your company.

To view the Customer Portal Home Page

- 1 From the Support tab, click the link.

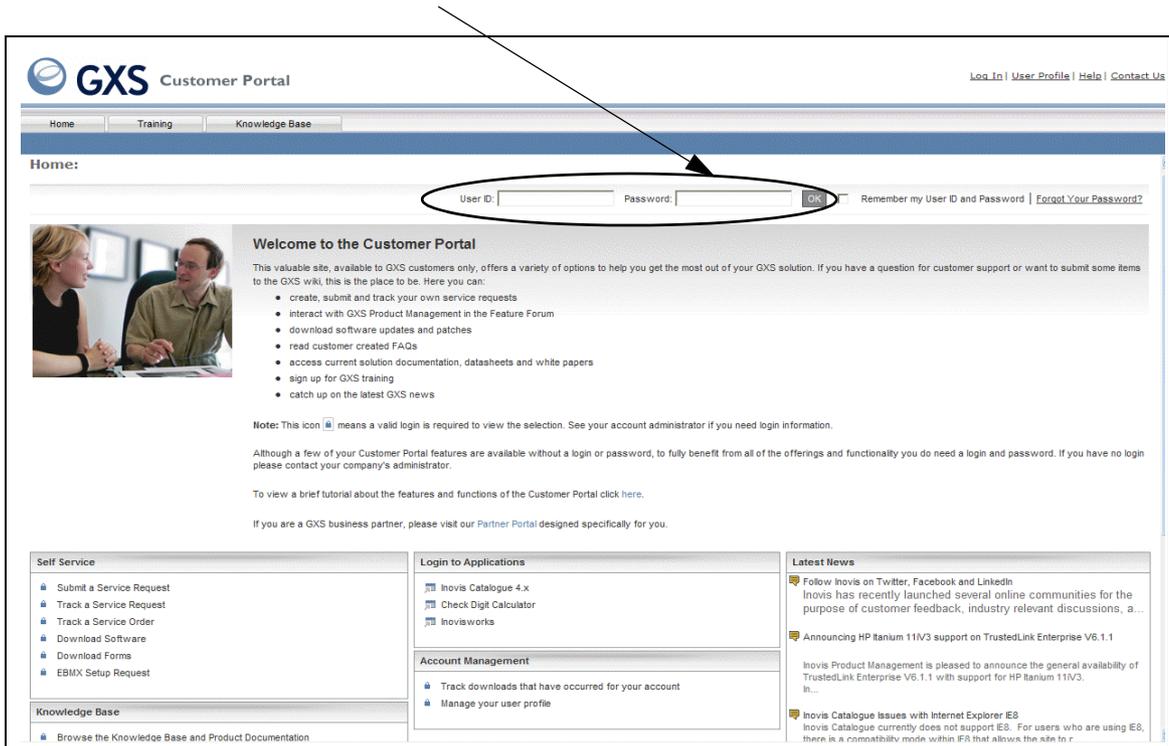


Click to access the GXS Solution Center.

The Customer Portal page opens.

- 2 Type your login ID and password > click **OK**.

Note: Passwords are case sensitive.



The GXS Customer Portal page opens.

Use this page to:

- Log and track service requests
- Search the product Knowledge Base
- Read product FAQs
- Download forms
- Find product Documentation
- Read the latest GXS news
- Find a User Forum

GXS Customer Portal [Log Out](#) | [User Profile](#) | [Help](#) | [Contact Us](#)

Home | Training | User Administration | Community | Knowledge Base

Self Service

- Submit a Service Request
- Track a Service Request
- Submit a Service Order
- Track a Service Order
- Download Software
- Download Forms
- EBMX Setup Request

Knowledge Base

- Browse the Knowledge Base and Product Documentation
- Access Product Literature

Login to Applications

- Inovia Catalogue 4.x
- Check Digit Calculator
- Inovisworks

Account Management

- Track downloads that have occurred for your account
- Manage your user profile

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Inovia Product Management is pleased to announce the general availability of TrustedLink Enterprise V6.1.1 with support for HP Itanium 11iV3. In...

The FTP file transfer protocol is used to transfer files to and from Inoivisworks.

- “FTP Home Directory” on page 157
- “Standard FTP Commands” on page 158
- “FTP Site Commands for Inoivisworks” on page 158
- “Tovan folders” on page 159
- “Sending FTP Files” on page 160
- “Fromvan folders” on page 160
- “Receiving FTP files” on page 161
- “Receiving FTP Files Using the Original Filename” on page 161
- “Document Filename Format” on page 162
- “Custom Filenames” on page 162
- “Reports Folder” on page 162
- “Report Filename Format” on page 162
- “Avoiding FTP Time-Outs” on page 162
- “Finding a Session ID” on page 163

FTP Home Directory

The FTP home directory has three primary folders.

- **tovan**—used to send/put/push files to Inoivisworks (see “Tovan folders” on page 159).
- **fromvan**—used to retrieve/get/pull files from your mailbox folders (see “Fromvan folders” on page 160).
- **reports**—used to retrieve/get/pull FTP On-Demand and Recurring reports (see “Reports Folder” on page 162).

Standard FTP Commands

Standard FTP commands are used to send, receive, and list documents.

Use this command:	to...
ls	Create a list of files in the current directory.
dir	Create a list of files in the current directory.
cd	Change directories.
put, mput, or append	Send files.
get or mget	Retrieve documents.
pwd	Print the current directory.
type	List the transfer mode, ASCII or binary (bin).
pasv	Set the FTP gateway to passive mode.

FTP Site Commands for Inovisworks

Use these custom commands with Inovisworks:

Note: Some FTP clients might not directly support SITE commands, which means you might need to use a QUOTE or LITERAL command when sending SITE commands. Consult your FTP client documentation.

Use this command	To...
site docid	Set the filename mode to document ID.type for the current session. Default. See “Receiving FTP Files Using the Original Filename” on page 161.
site filename	Set the filename mode to original filename for the current session. If several files have the same original filename, a suffix will be appended incrementally. Example: wsr_po.xml, wsr_po.xml.1, and wsr_po.xml.2 See “Receiving FTP Files Using the Original Filename” on page 161.
site filename nosuffix	Set the filename mode to original filename for the current session. If several files have the same original filename, the original filename will be repeated. The oldest filename is retrieved first. See “Receiving FTP Files Using the Original Filename” on page 161.
site discard_empty_files	Ignore empty (0 length) files for the current session; do not issue parse errors. <ul style="list-style-type: none"> ■ Default—Process empty files and issue parse errors. To return to default behavior: <ul style="list-style-type: none"> ■ Type site discard_empty_files off
site sessionID	Returns the FTP session ID. Note: The session ID automatically displays at the beginning of a session. See “Finding a Session ID” on page 163.
site sync	Put the current FTP session in synchronous mode. Files are parsed before sending an acknowledgement. Default. See “Avoiding FTP Time-Outs” on page 162.

Use this command	To...
site async <size> Example: <ul style="list-style-type: none"> ■ site async or ■ site async 50000 	Put the current FTP session in asynchronous mode. <ul style="list-style-type: none"> ■ Default file size—500 KB. ■ 0—Send all files asynchronously. Files larger than the threshold are stored and processed in asynchronous mode. See “Avoiding FTP Time-Outs” on page 162.
site report txstatus <ul style="list-style-type: none"> ■ format_csv or ■ format_fixed 	Return synchronous response for each interchange in the file during a PUT or GET. Default: CSV. See “Generating an FTP Interactive Audit Report” on page 80.
Example: site report txstatus format_fixed	
site report txstatusx <ul style="list-style-type: none"> ■ format_csv or ■ format_fixed 	Return synchronous response for each file transfer. Default: CSV. See “Generating an FTP Interactive Audit Report” on page 80.
Example: site report txstatusx format_fixed	
site report sessionstatus <ul style="list-style-type: none"> ■ format_csv or ■ format_fixed 	Return response during QUIT for each interchange PUT or GET during the session. Default: CSV. See “Generating an FTP On-Demand Report” on page 84.
Example: site report sessionstatus format_fixed	
site report query <specifier> Specifiers (one is required): <ul style="list-style-type: none"> ■ start=yyyymmddhhmm end=yyyymmddhhmm ■ since_last ■ session=<sessionid> Filters (optional): <ul style="list-style-type: none"> ■ status=ok, err, all ■ direction=in, out, both ■ tp=<alias.qual> ■ tp=<alias> ■ icn=<interchange CtrlNum> ■ type=<doctype> ■ Format (optional): <ul style="list-style-type: none"> ■ format_csv ■ format_fixed 	Return an audit report into the Reports directory at a later time. Defaults: <ul style="list-style-type: none"> ■ End time=Current time ■ Status=all ■ Direction=both ■ Format_CSV See “Generating an FTP On-Demand Report” on page 84.
Example: site report query session=1103963987	

Tovan folders

The tovan folder is used to store EDI data files ready to send to a Trading Partner via Inovisworks.

FTP tovan folders are created by GXS within Inovisworks based on your File Type or Trading Partner.

Use this folder:	to...
tovan/edi	Store and send EDI documents to Inovisworks.
tovan/edi/<receiver>	Store and send EDI files to a specified receiver. <ul style="list-style-type: none"> ■ TradingID ■ TradingID.Qualifier ■ PSN
tovan/bin/<receiver>	Store and send binary files to a specified receiver. <ul style="list-style-type: none"> ■ TradingID ■ TradingID.Qualifier ■ PSN
tovan/xml/<receiver>	Store and send XML files to a specified receiver. <ul style="list-style-type: none"> ■ TradingID ■ TradingID.Qualifier ■ PSN

Sending FTP Files

To send/put FTP files

- 1 Connect to your FTP server.
- 2 From the FTP directory, select the FTP tovan folder.
- 3 Open the correct FTP file folder. For example: bin, edi, or xml.
- 4 Change to the <receiver> directory.

Note: For EDI and XML files that include a receiver Trading ID and Qualifier, you do not need to change to the <receiver> directory. For example, if you have changed to the **tovan/edi** directory, type:

```
ftp>put 15334433.edi
```

- 5 On the command line, type **put** and the name of the file you want to send in this format:
ftp>put <filename>

Examples:

```
ftp>put 15334432.bin
ftp>put 15334432.edi
ftp>put 15334432.xml
```

FTP brings the file into your **tovan** folder and sends it to your Trading Partner.

Fromvan folders

The fromvan folder is used to store EDI transactions ready to be retrieved.

FTP fromvan folders are created by GXS within Inovisworks based on your File Type or Trading Partner.

From this folder:	Retrieve files based on...
fromvan/doc_<type>	Document Type: <ul style="list-style-type: none"> ■ Purchase Order (PO) ■ Invoice (IN) ■ EDIFACT (orders) ■ Shipment and Billing notice (BS) Example: fromvan/doc_orders
fromvan/<partner>	<ul style="list-style-type: none"> ■ Trading Partner's Account Number (PSN) ■ Trading ID ■ Trading ID.Qualifier Example: fromvan/301505931

Receiving FTP files

To receive FTP files

- 1 Connect to your FTP server.
- 2 From the FTP directory, select the FTP fromvan folder.
- 3 Select the correct FTP folder.
Example: fromvan, fromvan/doc_<type>, or fromvan/<partner>
- 4 Type **get <filename>** or **mget <pattern>**.
Example: mget *.edi

The FTP server delivers your document to your hard drive where it is stored and processed.

Receiving FTP Files Using the Original Filename

Use site commands to retrieve files using the original filename.

To receive FTP files using the original filename

- 1 Connect to your FTP server.
- 2 From the FTP directory, select the FTP fromvan folder.
- 3 Select the FTP file type folder you need.
Example: fromvan, fromvan/doc_<type>, or fromvan/<partner>
- 4 Perform the appropriate action:

If you want to...	Type...
Add a suffix to duplicate filenames	site filename
Repeat any duplicate filenames	site filename nosuffix

Note: Some FTP clients might not directly support SITE commands, which means you might need to use a QUOTE or LITERAL command when sending SITE commands. Consult your FTP client documentation.

The filename mode changes from documentID.type to original filename mode.

5 Type **get** <filename> or **mget** <pattern>.

Example: mget *.edi

The FTP server delivers your document to your hard drive where it is stored and processed.

Document Filename Format

Document filenames are in this format: **document ID.<format>**

EXAMPLE

15334432.edi

You can also retrieve files from a trading partner using the original filename (see “Receiving FTP Files Using the Original Filename” on page 161).

Custom Filenames

If you want to use unique filenames to retrieve groups of documents as single files by document type or trading partner, call the GXS Solution Center at +1 877.446.6847 and request custom filenames be setup for your account. For example:

- fromvan/**purchase_file**
- fromvan/**acmecorpfiles**

Reports Folder

Use the **reports** folder to retrieve/get/pull FTP On-Demand and Recurring reports created using FTP commands (see “Retrieving Files from the FTP Reports Directory” on page 85).

Report Filename Format

Report filenames are in this format:

<reportid>.rpt

The report ID is a unique number assigned to each report.

Avoiding FTP Time-Outs

If you experience FTP time-outs when processing larger files, change session processing from synchronous (default) to asynchronous. Inoivisworks processes files larger than the default (500 KB) asynchronously. It processes files smaller than the default synchronously.

To change session processing

- At the FTP command line, perform the appropriate action:

If you want to put the current session in ...	Type...
Synchronous mode (default)	site sync
Asynchronous mode	site async <size> <size> = numeric value that indicates files larger than the threshold will be processed asynchronously. Examples: site async or site async 50000

Note: Some FTP clients might not directly support SITE commands, which means you might need to use a QUOTE or LITERAL command when sending SITE commands. Consult your FTP client documentation.

The processing for the current session changes.

Finding a Session ID

The FTP session ID automatically displays at the beginning of a session.

To find a session ID after the session ID no longer displays

- At the FTP command line, type:
site sessionID

The session ID is returned; for example, **200 Session ID is 9952.**

Data syntax errors are caused by documents that do not meet EDI standards. In general, the errors are relatively easy to resolve.

Inovisworks generates data syntax error messages during the parsing process. The parser analyzes documents to ensure they meet EDI standards. Use the information in this topic to identify and resolve data syntax errors.

X12 and EDIFACT Messages:

- “BAD_IC_CONTROL_INVALID” on page 166
- “BAD_IC_CONTROL_MISMATCH” on page 166
- “BAD_IC_CONTROL_NUMBER_MISSING” on page 166
- “BAD_IC_DOC_COUNT” on page 166
- “BAD_IC_GROUP_COUNT” on page 167
- “BAD_IC_INCOMPLETE” on page 167
- “BAD_IC_INVALID_SEPARATOR_IGNORED” on page 167
- “BAD_IC_INVALID_SEPARATOR_WRONG_DEFAULTS” on page 167
- “BAD_IC_INVALID_SEPARATORS_IDENTICAL” on page 168
- “BAD_IC_MIXED_GROUP_DOC” on page 168
- “BAD_IC_SEG_COUNT” on page 168
- “BAD_IC_UNEXPECTED_CHARACTERS” on page 169
- “BAD_IC_UNEXPECTED_DOC” on page 169
- “BAD_IC_UNEXPECTED_OBJECT” on page 169
- “BAD_IC_UNEXPECTED_SEGMENT” on page 169
- “BAD_XML_INCOMPLETE” on page 170
- “BAD_XML_INCOMPLETE_FAILURE” on page 170
- “UNRECOGNIZABLE EDI” on page 170

TRADACOMS Messages:

- “BAD_IC_EXTRA_RECON_MESSAGE_FOUND” on page 170
- “BAD_IC_HEADER_INVALID_ELEMENT” on page 171
- “BAD_IC_HEADER_INVALID_ELEMENT_CODE” on page 171
- “BAD_IC_HEADER_MISSING_ELEMENT” on page 171

- “BAD_IC_HEADER_TOO_MANY_ELEMENTS” on page 171
- “BAD_IC_INVALID_RECON_MESSAGE_EXTRA_SEG” on page 171
- “BAD_IC_INVALID_RECON_MESSAGE_SEG_MISSING” on page 172
- “BAD_IC_MISSING_RECON_MESSAGE” on page 172
- “BAD_IC_RECEIVER_ID_MISMATCH” on page 172
- “BAD_IC_RECON_MESSAGE_NOT_LAST” on page 172
- “BAD_IC_UNEXPECTED_RECON_MESSAGE” on page 173

BAD_IC_CONTROL_INVALID

Probable Cause

The control number value in an interchange header is inconsistent with the element's defined data type. The error is usually caused by non-numeric data in a control number value defined as numeric.

Solution

Be sure the interchange control number is numeric.

BAD_IC_CONTROL_MISMATCH

Probable Cause

The interchange header and trailer segment control numbers do not match.

Solution

Be sure the interchange header and trailer segment control numbers have the same value.

BAD_IC_CONTROL_NUMBER_MISSING

Probable Cause

There is no interchange control number in the interchange header or trailer segment.

Solution

Add the interchange control number to the interchange header or trailer segment.

BAD_IC_DOC_COUNT

Probable Cause

The interchange trailer segment has a document count element value that does not agree with the number of documents counted by the parser.

Solution

Be sure the interchange trailer segment's document count element value matches the number of documents in the interchange. The number of documents in the interchange is based on the number of document header segments, such as ST, UNH, or MHD.

BAD_IC_GROUP_COUNT

Probable Cause

The interchange trailer segment has a group count element value that does not agree with the number of groups counted by the parser.

Solution

Be sure the interchange trailer segment's group count element value matches the number of groups in the interchange. The number of groups in the interchange is based on the number of group header segments, such as GS or UNG.

BAD_IC_INCOMPLETE

Probable Cause

An interchange trailer segment was not identified before the end of the data stream. All data from the identified interchange header to the end of the file was treated as part of the interchange.

Solution

Be sure all interchanges are enclosed between a header segment and a trailer segment.

BAD_IC_INVALID_SEPARATOR_IGNORED

Probable Cause

An invalid character was used to define a separator. This error occurs if a number or letter is used to define the component element separator in the ISA segment of an X12 interchange.

Note: Using letters or numbers as separators increases the likelihood of erroneous parsing and reduces the usable characters for data element values.

Solution

Do not use letters or numbers as separators.

BAD_IC_INVALID_SEPARATOR_WRONG_DEFAULTS

Probable Cause

The wrong set of separator characters is being used in an EDIFACT-based interchange. Depending on character set and syntax version, EDIFACT defines three sets of default separator characters. This message indicates the separators are not appropriate, but are identified as one of the other default sets.

Solution

Add a preceding UNA segment to identify the separators being used.

Note: UNA can be used to set any characters as separators.

BAD_IC_INVALID_SEPARATORS_IDENTICAL

Probable Cause

Two types of separator characters were defined using the same symbol.

Solution

For EDI data to be accurately parsed, all separator characters must be unique.

For X12 interchanges, the separator characters also must not be used in the data elements. There is no way to identify a separator character as being part of the data if it is used within a data element value.

For EDIFACT interchanges, you can define a unique release character that can be used to precede and “deactivate” a separator character so it can be included in the data portion of an element.

BAD_IC_MIXED_GROUP_DOC

Probable Cause

Functional groups and stand-alone documents exist within the same interchange.

- X12—Does not allow stand-alone documents.
- EDIFACT—Allows stand-alone documents or functional groups, but both cannot be in the same interchange.

Solution

- For X12—Be sure all documents within the interchange are enclosed within the appropriate functional groups.
- For EDIFACT—Be sure all documents are standalone by either:
 - Eliminating functional group structures (the more common approach)
OR
 - Ensuring documents are fully contained in the appropriate functional groups

BAD_IC_SEG_COUNT

Probable Cause

According to the standard's counting rules, the interchange trailer segment has a segment count element value that does not agree with the number of segments counted by the parser.

Solution

Be sure the interchange trailer segment's segment count element value matches the number of segments in the interchange.

BAD_IC_UNEXPECTED_CHARACTERS

Probable Cause

The parser found unexpected data within identified segments in an EDI interchange. In most cases the cause is white space. The cause could be other characters that are inappropriate for starting a segment tag.

In most EDI standards, syntax rules do not permit surplus bytes between the terminator character of a segment and the tag of the next. This includes—but is not limited to—CR\LF sequences following defined segment terminators.

Solution

Eliminate excess characters between segments.

BAD_IC_UNEXPECTED_DOC

Probable Cause

The parser found a document outside the scope of a functional group. This can happen if:

- Any ST segment was encountered outside the bounds of a GS/GE construct
OR
- An EDIFACT interchange contained a UNG/UNE construct and was followed by stand-alone documents

Solution

Be sure the syntax is correct in the document.

BAD_IC_UNEXPECTED_OBJECT

Probable Cause

When the EDIFACT syntax level specified in the UNB is less than 4, this error indicates the presence of syntax-level 4 associated objects enclosed in UNO and UNP segments. These associated objects are not valid before syntax level 4.

Solution

Remove the associated binary object.

BAD_IC_UNEXPECTED_SEGMENT

Probable Cause

The parser found a segment in an interchange that was placed outside the range of a document.

Solution

Be sure all document data is enclosed in a header segment (such as ST or UNH) and a document trailer (such as SE or UNT).

BAD_XML_INCOMPLETE

Probable Cause

An XML document was identified, but there was no closing root tag to match the opening tag.

Solution

According to XML syntax rules, each XML document should be opened with a root tag, such as <root>, and closed with a corresponding closing tag, such as </root>.

BAD_XML_INCOMPLETE_FAILURE

Probable Cause

An XML document was identified, but there was no closing root tag to match the opening tag. Similar to the “BAD_XML_INCOMPLETE” error, this error suggests there was a system problem while processing the data, such as a read failed or another problem.

Solution

Contact the GXS Solution Center at +1 877.446.6847.

UNRECOGNIZABLE_EDI

Probable Cause

Inovisworks received a file that was not formatted using standard EDI structure or the file contained zero bytes.

Solution

Be sure the file is formatted using standard EDI structure (for example, ISA, GS, ST, SE, GE, and IEA) before sending it to Inovisworks. The data must contain standard segments and elements to be processed by Inovisworks.

If the file contains zero bytes, eliminate zero byte files from your sessions.

BAD_IC_EXTRA_RECON_MESSAGE_FOUND

Probable Cause

The parser found more than one reconciliation message in the interchange.

In TRADACOMS, when a reconciliation message is required (STX01:1=ANAA), one RSGRSG message must appear as the last message in the interchange. More than one RSGRSG message was found.

Solution

Eliminate the extra RSGRSG message(s).

BAD_IC_HEADER_INVALID_ELEMENT

Probable Cause

The parser found an element in the interchange header segment that did not fit the defined size. The element value might be too long or too short based on the standard definition for the element.

Solution

Correct the element value to conform to the size limitations.

BAD_IC_HEADER_INVALID_ELEMENT_CODE

Probable Cause

The parser found an element value in the interchange header segment that was not valid based on the standard-defined code list for the element.

Solution

Correct the element value by changing it to a valid code value.

BAD_IC_HEADER_MISSING_ELEMENT

Probable Cause

The parser found an interchange header segment that was missing one or more mandatory elements.

Solution

Correct the interchange header by ensuring all mandatory elements are present.

BAD_IC_HEADER_TOO_MANY_ELEMENTS

Probable Cause

The parser found an interchange header segment that contains elements beyond the last defined position.

Solution

Remove the excess elements from the end of the interchange header segment.

BAD_IC_INVALID_RECON_MESSAGE_EXTRA_SEG

Probable Cause

The parser found an invalid reconciliation message.

In TRADACOMS, the RSGRSG reconciliation message is made up of three segments: one MHD (message header), one RSG (reconciliation information segment), and one MTR (message trailer). There was another segment found in the RSGRSG message (might be an additional RSG segment or some other segment).

Solution

Eliminate the excess segment(s) from the RSGRSG message.

BAD_IC_INVALID_RECON_MESSAGE_SEG_MISSING

Probable Cause

The parser found an invalid reconciliation message.

In TRADACOMS, the RSGRSG reconciliation message is made up of three segments: MHD (message header), RSG (reconciliation information segment), and MTR (message trailer). The RSG segment was not found.

Solution

Correct the RSGRSG message by inserting the RSG segment between MHD and MTR.

BAD_IC_MISSING_RECON_MESSAGE

Probable Cause

Coding in the interchange header indicated a reconciliation message was required, but the parser did not find a reconciliation message.

In TRADACOMS, the STX01:1 element can contain either ANA or ANAA. If ANAA, an RSGRSG reconciliation message must appear as the last message in the interchange. The STX01:1 contained ANAA.

Solution

Either change the STX01:1 element to contain ANA or add an RSGRSG message from the interchange to the end of the interchange.

BAD_IC_RECEIVER_ID_MISMATCH

Probable Cause

The parser found a mismatch between the receiver ID in the interchange header segment and the receiver ID in the reconciliation message.

In TRADACOMS, the reconciliation message (RSGRSG) is used to confirm the receiver ID and the interchange control number. The receiver ID found in the RSG segment did not match the receiver code value (STX03:1).

Solution

Correct the receiver ID in the reconciliation message or change the receiver ID in the interchange header segment.

BAD_IC_RECON_MESSAGE_NOT_LAST

Probable Cause

The parser found a message after the reconciliation message in the interchange.

In TRADACOMS, when a reconciliation message is required (STX01:1=ANAA), one RSGRSG message must appear as the last message in the interchange. The parser found one or more messages in the interchange appearing after the RSGRSG.

Solution

Eliminate the messages that follow the RSGRSG message or move the RSGRSG message so it appears at the end of the interchange.

BAD_IC_UNEXPECTED_RECON_MESSAGE

Probable Cause

Coding in the interchange header indicated a reconciliation message was not expected, yet the parser found a reconciliation message.

In TRADACOMS, the STX01:1 element can contain either ANA or ANAA. If ANAA, an RSGRSG reconciliation message must appear as the last message in the interchange. The STX01:1 did not contain ANAA.

Solution

Either change the STX01:1 element to contain ANAA or remove the RSGRSG message from the interchange.

Frequently Asked Questions

10

Whatever tab you are viewing when you click FAQ Help, you open the questions and answers for that particular tab. To see other FAQs without selecting the tab, select Frequently Asked Questions in the Help files.

- “Home Tab” on page 175
- “Document Tracking Tab” on page 177
- “Reports Tab” on page 179
- “Administration Tab” on page 180
- “Premium Services Tab” on page 182
- “Support Tab” on page 182

Home Tab

- “Why doesn’t my page show some of the functions described?”
- “Can I find out to which services I already subscribe?”
- “Is it possible to see more Transaction Summary information?”
- “How do I update my profile?”
- “What are Breadcrumbs?”

Why doesn’t my page show some of the functions described?

This information is for all Inovisworks customers. What you see is based on your Login ID and password; consequently, there might be times when you cannot perform the tasks listed or see all of the fields described.

How do I use the Account Selection Area at the top of the page?

Use the **Search by** Account Selection area on the top right of each Inovisworks page for general document searches. When selecting accounts to view, you are selecting the

mailboxes to be searched when you perform a document search, or want to view a transaction summary.

From the drop-down list, select:

- PSN—Product Service Number (Account)
- PSN (Account) email
- Trading ID/Qualifier

Type your search criteria.

Search by Account (PSN) Search

Account (PSN) 412910732 - IW REBRANDING Customer ID: 501983608 Company Name: IW

From the drop-down list, select:

- All accounts
- A specific account

Can I find out to which services I already subscribe?

Yes. When the Home tab opens, on the right side of the page is the heading **My Services**, where all current services are listed. You can also add an on-line enabled service here.

Is it possible to see more Transaction Summary information?

Yes, you can click a color-coded area in the graph to go to the Document List page for all documents represented by the color; for example, all purchase orders.

The color-coded status graph shows the status and number of transactions.

If you:	You see...
<p>Move your cursor over a color-coded area</p>	<p>Summary information about the documents represented by that color.</p> <div style="text-align: center; margin-top: 20px;"> </div>
<p>Click a colored-coded area in the graph.</p>	<p>The Document List page opens, listing all documents represented by the selected color in the column (see “Using the Document List” on page 49).</p>

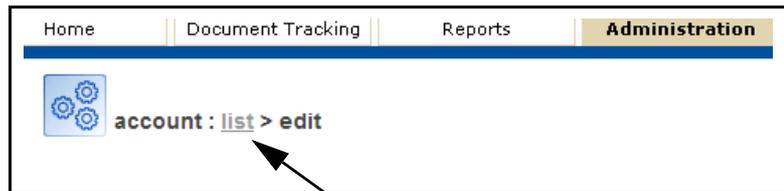
How do I update my profile?

To update your profile

- 1 Click **Home** tab > **My Profile**.
Your user profile displays.
- 2 Type or select your changes.
- 3 Click **Update Profile** to return the updated Profile page.

What are Breadcrumbs?

Breadcrumbs are links showing you where you are in the application and either how you got there, or Inovisworks's recommended route.



Breadcrumbs—Clicking a link returns you to the selected page, or use the Backspace key to return one page at a time.

Document Tracking Tab

- “How do I find documents?”
- “What’s the difference between Inbound and Outbound documents?”
- “What’s the Document Detail Page?”
- “Knowing When to Resend or Reprocess Documents?”
- “How can I find what caused my document to fail?”
- “What if I’ve sent a document but don’t want it picked up?”
- “Can I download documents onto my hard drive?”

How do I find documents?

From the Document Tracking tab, use a Basic, Advanced, or Quick search to find documents.

- “Using the Basic Search Option” on page 38
- “Using the Advanced Search Option” on page 39
- “Using the Quick Search” on page 42

What’s the difference between Inbound and Outbound documents?

- **Inbound documents**—are documents *received* by your company from a Trading Partner.
- **Outbound documents**—are documents *sent* from your company to a Trading Partner.

What’s the Document Detail Page?

The Document Detail page shows detail for a specific document.

To view document details

- 1 Click the **Document Tracking** tab.
- 2 Search for documents using the Basic, Advanced, or the Quick Search.
For information about document searches, see “Searching for Documents” on page 37.
- 3 From the Document List page, click the Document ID for which you need the detail.
See “Viewing Document Details” on page 52.

Knowing When to Resend or Reprocess Documents?

If a document fails to reach your trading partner, you must:

- Determine why it failed
- Either Resend or Reprocess the document

Resend—If the document failed because of a transmission error (Comm-Errors), click Resend and send it back across the network (see “Resending an Outbound Document” on page 58).

Reprocess—If the document failed because of process errors, you must correct the document and put it back in the queue for reprocessing (see “Reprocessing Documents” on page 60).

How can I find what caused my document to fail?

To find document errors

- 1 Click the **Document Tracking** tab.

The Basic Search page opens.

- 2 Search for documents using the Basic, Advanced, or the Quick Search.
For information about document searches, see “Searching for Documents” on page 37.
- 3 From the Status list, select **All Errors**.
- 4 Type all needed information.

For field definitions, see “Basic Search Field Definitions” on page 39 or “Advanced Search Field Definitions” on page 41.

The Document List page lists all error documents, with the error description listed in the Status column. The Document ID, Doc Type, Sender, Receiver, Process Time, and ICN are also shown. For more information about the Document List page, see “Using the Document List” on page 49.

Document ID	Doc Type	Status	Sender	Receiver	Processed Time	ICN	Sender NetworkID	Receiver NetworkID	Ack Status	Original Filename
275511111	DESADV	DataSyntaxError	LC GENERIC CUSTOMER (LOGENERC)	IV REBRANDING (IVREBRANDNG)	11/17/2010 13:42:28	3			N/A	111_BAD_IC_UNEXPECTED_CHARACTERS
275510951	INVFL	DataSyntaxError	LC GENERIC CUSTOMER (LOGENERC)	IV REBRANDING (IVREBRANDNG)	11/17/2010 13:41:03	481			N/A	108_BAD_IC_INCOMPLETE
275510843	SR	DataSyntaxError	LC GENERIC CUSTOMER (LOGENERC)	IV REBRANDING (IVREBRANDNG)	11/17/2010 13:38:26	00166			N/A	103_BAD_IC_SEG_COUNT
275510216	EDI	DataSyntaxError	LC GENERIC CUSTOMER (LOGENERC)	IV REBRANDING (IVREBRANDNG)	11/17/2010 13:37:33	27509			N/A	102_BAD_IC_DOC_COUNT
275509383	ORDERS	DataSyntaxError	LC GENERIC CUSTOMER (LOGENERCZZ)	IV REBRANDING (IVREBRANDNGZZ)	11/17/2010 13:07:27	1800			N/A	113_BAD_IC_UNEXPECTED_OBJECT

- 5 Click the **Document ID** of the document you need.

The Document Detail page opens graphically displaying the errors. For more information, see “Viewing Document Details” on page 52.

What if I've sent a document but don't want it picked up?

If the document you sent still has an Available status you can put a Hold status on the document.

To put a document on hold

- 1 Click the **Document Tracking** tab.
- 2 Find the document using the Quick, Basic, or Advanced Search option.
- 3 Click the **Document ID** of the document you want.
The View Detail page opens.
- 4 Click **Hold**.
A message requests status confirmation.
- 5 Click **Continue**.
A check mark under the Result field indicates the document was placed on hold.

Can I download documents onto my hard drive?

Yes. If you want to view the entire content of an error status document, for example, that is larger than 32K and therefore not entirely visible on page, use the export option to download the file to your hard drive.

To export a document to your hard drive

- 1 Click the **Document Tracking** tab.
- 2 Find the document using the Quick, Basic, or Advanced Search option.
- 3 Click the Document ID of the document you want.
The View Detail page opens.
- 4 Click **Export**.
The File Download dialog box opens.
- 5 Select **Save this file to disk**, and click **OK**.
The **Save As** dialog box opens.
- 6 Verify or type the name of the document you want to save.
- 7 Navigate to the hard drive directory you need and click **Save**.

Reports Tab

- “What reports are available?”
- “How do I view Reports?”
- “What is meant by Document Count on my Billing Usage Report?”
- “What is meant by Character Count on my Billing Usage Report?”
- “What are Peak Usage Hours?”

What reports are available?

Inovisworks generates these standard reports:

- **Billing Usage Report**—network activity for a specific day, month, or year based on document and character counts (see “Billing Usage Report” on page 76).
- **Document Summary Report**—document totals for a defined time period (see “Viewing a Document Summary Report” on page 78).
- **Payer Beneficiary Report**—based on the customer ID of the payer, lists the payer’s beneficiaries (see “Payer Beneficiary Reports” on page 90).
- **Trading Partner Report**— lists Trading Partners (see “Viewing a Trading Partner Report” on page 98).

You can generate additional reports as needed or on a regular basis:

- **FTP Interactive Audit Report**—provides synchronous audit feedback during (or after) an FTP session (see “FTP Interactive Audit Report” on page 79).
- **FTP On-Demand Report**—lists document totals for a defined time period (see “FTP On-Demand Report” on page 84).
- **Recurring Report**—regular report that lists documents processed in time period (see “Recurring Reports” on page 92).

How do I view Reports?

- “Viewing a Billing Usage Report” on page 76
- “Viewing a Document Summary Report” on page 78
- “Viewing the Payer Beneficiary List Report” on page 90
- “Viewing Recurring Reports in Document Tracking” on page 96
- “Viewing a Trading Partner Report” on page 98

What is meant by Document Count on my Billing Usage Report?

Document Count is the number of documents sent through the network during peak and off peak hours (see “Billing Usage Report Description” on page 77).

What is meant by Character Count on my Billing Usage Report?

Character Count is the number of characters (document size) sent through the network during peak and off-peak hours.

What are Peak Usage Hours?

Monday through Friday, 6 a.m.—8 p.m. Eastern Standard Time.

Administration Tab

- “How do I add a Trading Partner?”
- “How can I find Trading a Partner Contact?”
- “How does my role relate to the functions I perform?”

How do I add a Trading Partner?

When you need to add a Trading Partner:

- Use Inovisworks to add a Trading Partner to an existing account (see “Adding an Account (Service) to an Existing Profile” on page 102).
- Send GXS a Trading Partner setup request when no account exists for the company on Inovisworks (see “Requesting GXS Set Up a Trading Relationship” on page 138).

How can I find Trading a Partner Contact?

Your Trading Partner contact is listed in the Trading Partner profile.

To find trading partner contact information

- 1 Click the **Administration** tab > **Trading Partner**.
- 2 Select a Trading Partner > click **View**.

The Trading Partner’s profile information page opens displaying your Trading Partner’s company and contact information.

How does my role relate to the functions I perform?

Customer and user maintenance functions (tasks) are defined by a customer’s role. Your Inovisworks logon ID defines your assigned Inovisworks role, and your role defines the functions (tasks) and pages you can view within Inovisworks.

- **Roles**—define a group of functions/tasks assigned to a login ID.
 - **Customer Admin**—has access to all user, trading partner, account, and document information.
 - **Customer User**— tasks are confined to those accounts for which he or she is responsible.
 - **Account Admin**—use this role for limiting administrative access to information for a specific account (PSN).
 - **Account User**—use this role for limiting user access for a specific account (PSN).
- **Functions**—actions a user can perform within Inovisworks. A user’s role defines which functions the user can perform.

The following table provides a high level overview of functions assigned to specific roles. Roles can have administrative access-full access (A), limited access (L), or view only (V).

Function	Customer Admin	Customer User	Account Admin	Account User
Home	A	L	L	L
Document Tracking	A	L	L	L
Reports	L	L		
Accounts	L	L	L	V
Acknowledgement Reconciliation	L	V	V	V
Archive & Restore	A	V		
Customer	A	A		
Document Scheduler	A	V		
Change Password	A	A		
Rules	A	A		

Function	Customer Admin	Customer User	Account Admin	Account User
Trading Partner	A	V	L	V
User (External)	A			
Support	A	A		

Premium Services Tab

“Do all users see the Premium Services tab?”

Do all users see the Premium Services tab?

Yes. All users can click the Premium Services tab and access the Visibility link, which provides access to marketing information. If you are associated with a company that subscribes to the cross-reference premium service, you can click the tab to access a link to the cross-reference tables.

Support Tab

- “How do I contact Customer Support?”
- “Can I see a list of all current messages?”

How do I contact Customer Support?

Customer Support email address and telephone phone numbers can be found from the Home tab or Support tab.

To contact GXS Customer Support

From either the Home tab or the Support tab, click **Contact Us**.

- Primary point of contact for support:
http://www.gxs.com/customers/global_service/global_support_center.
 You can log a problem ticket and document your comments.
- Telephone support:
 - In North America, call +1 877.446.6847
 - In Europe, call +44 (0)1483 569388
 - For International support outside EMEA, call +1 404.467.3806

Can I see a list of all current messages?

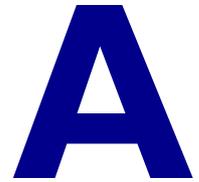
To view current messages

From either the Home tab or the Support tab, click **All messages**.

Messages from GXS include general announcements, alerts, and network notices.

- **To view the full text of a single message:** Click the message.
- **To view all current messages:** Click **View All Messages**, or from the navigation panel, click **Messages**.

Acknowledgement Reconciliation



Functional acknowledgement (FA) reconciliation is a premium service from GXS. You must subscribe to the service to perform the tasks in this topic.

FA Reconciliation is the process of verifying that original documents your company sends were received by your trading partners. When your company does not receive acknowledgements in a timely manner, Inovisworks notifies your trading partners automatically, allowing your company to better manage its business.

- “About FA Reconciliation” on page 183
- “Stages in FA Reconciliation Set up Process” on page 188
 - “Stage 1—Setting up FA Reconciliation Settings for Original Documents” on page 188
 - “Stage 2—Setting up Email Addresses in Event Notification Configurations” on page 197
 - “Set Up Process Complete” on page 198
- “Filtering Existing FA Reconciliation Settings” on page 198
- “Editing FA Reconciliation Settings for Original Documents” on page 199
- “Viewing FA Reconciliation Settings for Original Documents” on page 200
- “Deleting FA Reconciliation Settings for Original Documents” on page 200

About FA Reconciliation

Functional acknowledgements (FAs) are standard EDI documents. For the X12 standard, FAs are 997s; for the EDIFACT standard, FAs are CONTRL.

When your company sends EDI documents to your trading partners, your trading partners can respond by sending acknowledgements back you. Acknowledgements report the receipt of the original document by your trading partners and the results of a syntactical analysis of the original document.

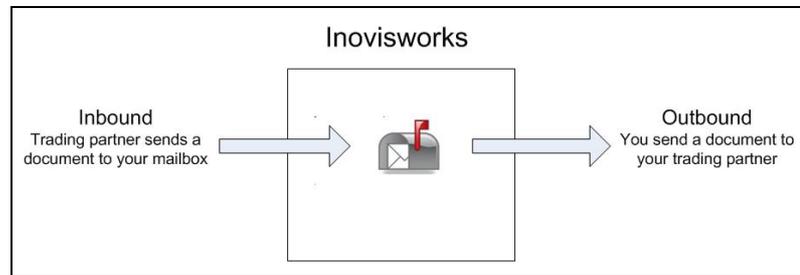
- “Inbound and Outbound Documents” on page 184

- “FA Reconciliation Definition” on page 184
- “Original Documents and Return Documents” on page 184
- “Timeouts” on page 185
- “Business Hours” on page 186
- “Events” on page 186
- “Alerts” on page 186
- “Event Notification Configurations” on page 187
- “Acknowledgement Status for Original Documents” on page 187

Inbound and Outbound Documents

In the context of Inoivisworks, outbound documents are those sent by your company to a trading partner. Inbound documents are those sent by your trading partners to your mailbox on Inoivisworks.

FA reconciliation settings are based on original documents you send to your trading partners. Because original documents are sent from your mailbox on Inoivisworks, Inoivisworks considers them to be outbound documents.



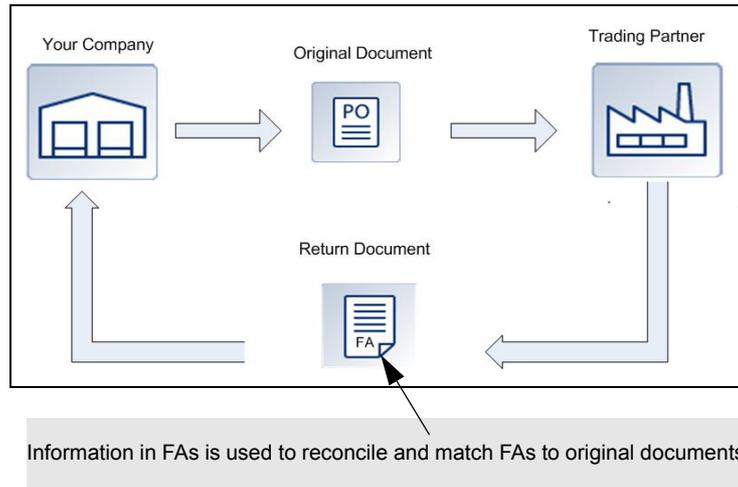
FA Reconciliation Definition

FA Reconciliation is the process of verifying documents were received by your trading partners. When you send an original document and do not receive acknowledgements in a timely manner, Inoivisworks notifies you automatically, allowing your company to better manage its business.

Original Documents and Return Documents

An original document is an EDI document, such as a purchase order, invoice, or ship notice. Your company sends original documents to your trading partners. Your company expects to receive return documents, such as FAs, from trading partners to confirm the trading partner received the original documents.

If your company subscribes to the FA reconciliation service, Inovisworks uses information in acknowledgements from your trading partners to reconcile and match them to the original documents you send.



Timeouts

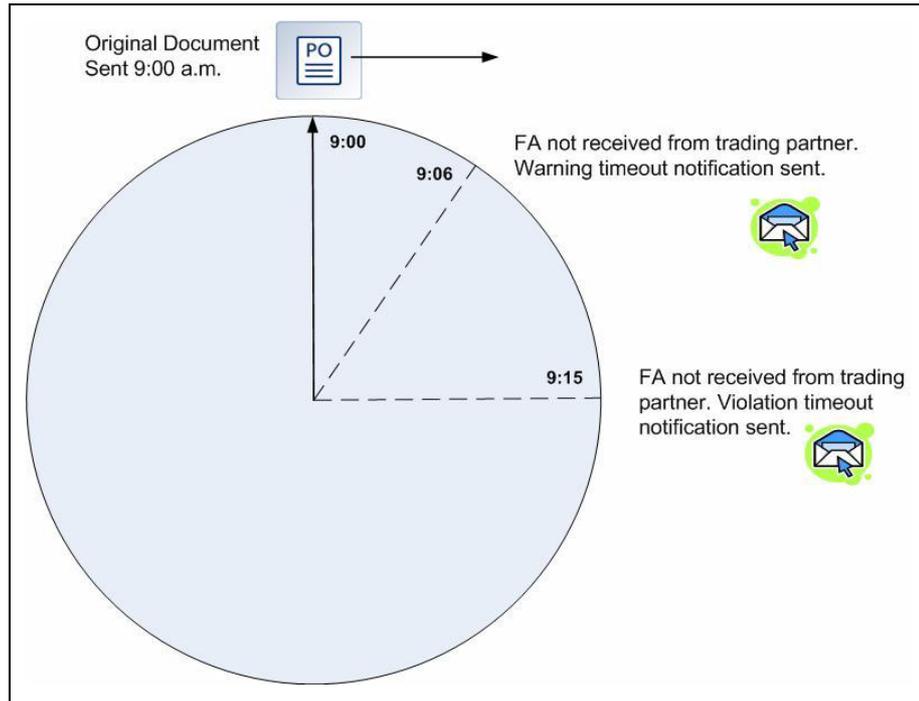
Timeouts are time intervals defined by your company. The time intervals specify periods in which you expect to receive return documents (acknowledgements) from trading partners. A typical timeout setting is 30 minutes.

Example Timeout Situation

If an acceptable amount of time to receive acknowledgements “runs out,” a timeout situation exists. Your company has set up FA reconciliation settings that indicate it wants GXS to send notifications that a:

- Warning timeout has occurred if FAs are not received from trading partners 6 minutes after the time the original document was sent.

- Violation timeout has occurred if FAs are not received from trading partners 15 minutes after the time the original document was sent.



Business Hours

Business hours specify a company’s active hours of operation. More than one set of business hours can be defined, such as Office Hours or Shipping Hours.

Business hours can be applied to FA reconciliation settings to specify how Inoivisworks processes timeout situations. If applied, Inoivisworks applies or “counts” timeout periods only during the business hours specified in the configuration.

Events

Events are any action performed on a document as it travels through the GXS network. For example, an event can be the reconciliation of a response transaction to an original transaction.

An event can be produced by any activity in Inoivisworks. Some events trigger alerts and others do not.

Alerts

Alerts use emails to notify your company that acknowledgement timeouts have occurred, such as warning or violation timeouts.

Alerts are based on an original document’s acknowledgement status. For example, your company might want to be notified every time it receives an acknowledgement (acknowledgement status is Received). Or, your company might want to be notified only if it gets acknowledgements for original documents that have been rejected by trading partners (acknowledgement status is Rejected).

Event Notification Configurations

Event notification configurations provide a way for you to be automatically notified of events that are of interest to you, such as document errors or acknowledgement reconciliation events.

You set up the email addresses to which the notifications are to be sent in event notification configurations. The configuration specify email addresses for:

- Your company, which sends original documents and subscribes to FA reconciliation
- Your trading partners from which you expect to receive FAs

See “Setting up Event Notifications for FA Events” on page 125.

Acknowledgement Status for Original Documents

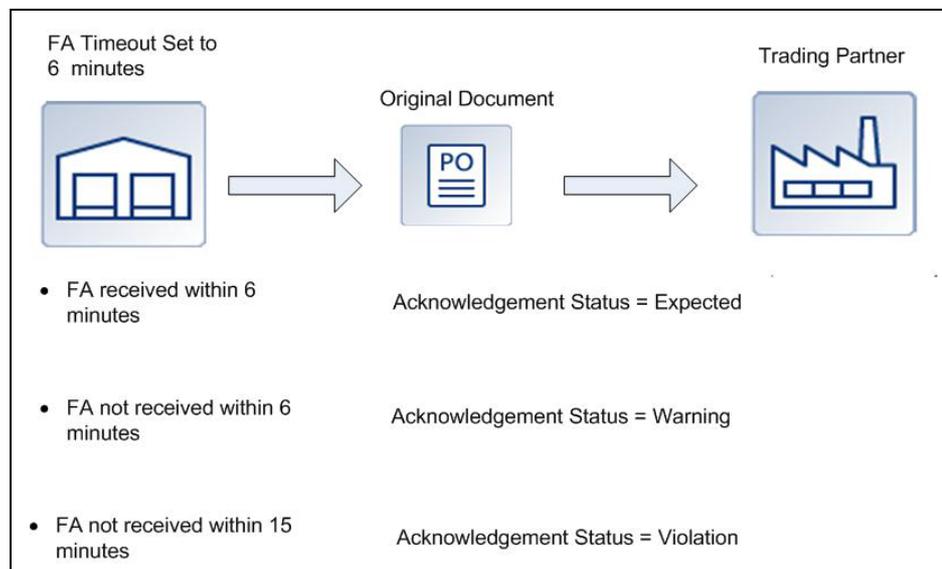
When FAs are not received on time, the timeout settings defined for your company can change the acknowledgement status of original documents. For example, when a timeout occurs, your company might want the original document’s acknowledgement status to be changed from Expected to Warning or Violation.

Use the Document Tracking tab to monitor acknowledgements and actively manage situations where acknowledgements do not reconcile with original documents (see “Example Original Document Acknowledgement Status” on page 187) and “Tracking Functional Acknowledgements” on page 63.

Example Original Document Acknowledgement Status

If a timeout situation exists, your company has set up FA reconciliation settings that request that GXS change the *acknowledgement status* of the original document (purchase order) to:

- Warning if FAs are not received within 6 minutes.
- Violation if FAs are not received within 15 minutes.



See “Processing Flow and Acknowledgement Status” on page 64.

Stages in FA Reconciliation Set up Process

Your company must follow a two-stage process to setup FA reconciliation settings and have email notifications sent to you and your trading partners. You go to different parts of Inoivisworks to complete the tasks in each stage.

For this stage...	Go to this part of Inoivisworks...
“Stage 1—Setting up FA Reconciliation Settings for Original Documents” on page 188	Administration tab > Ack Reconciliation
“Stage 2—Setting up Email Addresses in Event Notification Configurations” on page 197	Administration tab > Event Notification > Configure Event Notifications

Stage 1—Setting up FA Reconciliation Settings for Original Documents

The first stage of the acknowledgement reconciliation setup process is to set up FA reconciliation settings for original documents. The settings define how your company wants to reconcile acknowledgements in response to original documents. One account (PSN) can have many FA reconciliation settings.

The FA reconciliation set up process in Inoivisworks consists of a series of pages. Use the:

- First page—“To define general settings for the original document”
- Second page—“To define settings based on document standard (X12 or EDIFACT)”
- Third page—“To define business hours, and timeout and event notification settings”

To define general settings for the original document

- 1 Select the account (PSN) that subscribes to FA reconciliation.
- 2 Click the **Administration** tab > **Acknowledgement Reconciliation** > **Add**.

The FA Reconciliation Add page opens

- 3 Activate and name the configuration; for example, 850s for Acme Corporation.

Active Status: Indicates the status of this acknowledgement reconciliation setting. Inactive setting

***Configuration Name:** The name should be meaningful and identify any specific settings such as docume 850s for Hat Mart or /All documents from DIV1/ZZ.

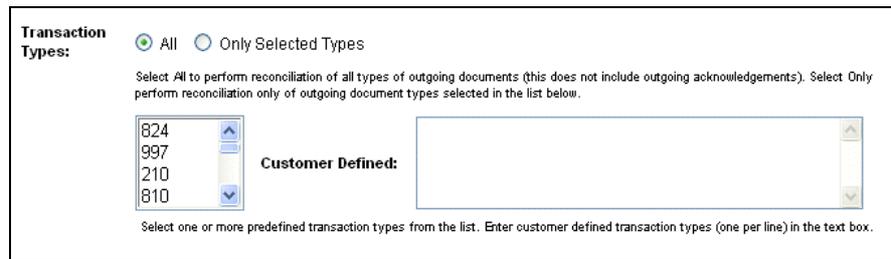
Make sure the name is meaningful, such as all documents from DIVA/ZZ.

- 4 In Original Document Settings, define the document standard, transaction types, and senders and receivers for which acknowledgements are to be reconciled (see “FA Reconciliation Field Descriptions (Page 1 of 3)” on page 193).

- a **Standard**—Select the document standard to which FA reconciliation settings are to be applied; for example, X12 or EDIFACT.

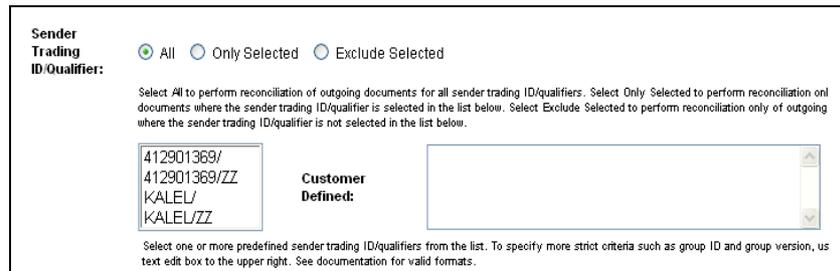
Standard: ▼

- b Transaction Types—Select the transaction types that are to be reconciled; for example, 850 for a purchase order or 810 for an invoice (see “Transaction Types” on page 194).



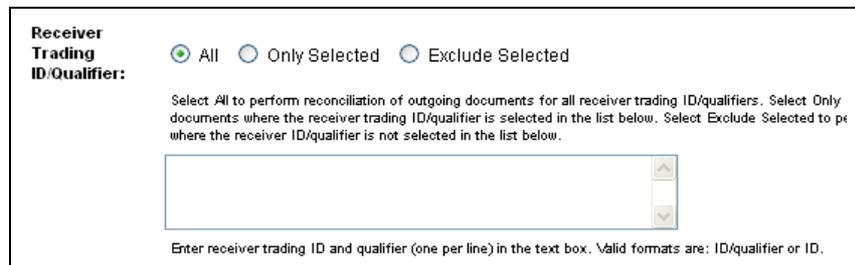
Note: Optionally, type transaction types that are unique to your company, one per line, in the text box. Ensure the values in the text box match the values in the documents that are sent.

- c Sender ID/Qualifier—For your company, select the sender IDs and qualifiers for which you want to reconcile the transaction types (see “Sender ID/Qualifier” on page 194 and “Customer Defined” on page 194).



- All—Reconcile outgoing documents for all sender ID/qualifiers.
- Only Selected—Reconcile outgoing documents only if the sender ID/qualifier is selected.
- Exclude Selected—Reconcile outgoing documents for all sender IDs/qualifiers except those that are selected.

- d Receiver ID/Qualifier—For your trading partners, select the receiver IDs and qualifiers for which outgoing documents will be reconciled (see “Receiver ID/Qualifier” on page 194).



- All—Reconcile outgoing documents for all receiver ID/qualifiers.
- Only Selected—Reconcile outgoing documents only if the receiver ID/qualifier is selected.

- Exclude Selected—Reconcile outgoing documents for all receiver IDs/qualifiers except those that are selected.

5 Click **Step 2**.

The settings page opens.

6 Go “To define settings based on document standard (X12 or EDIFACT)” on page 190.

To define settings based on document standard (X12 or EDIFACT)

Begin this procedure after completing step 5 in “To define general settings for the original document” on page 188.

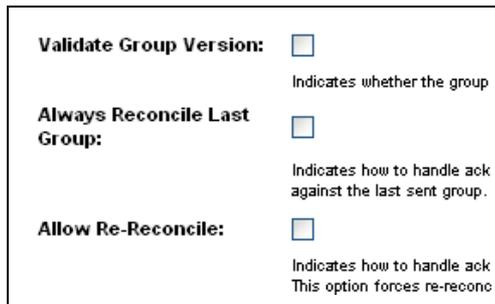
- 1 In Reconciliation Provider, select Inovisworks.



- 2 The remaining options on the page depend on the document standard you selected.

- X12—Go to step 3.
- EDIFACT—Go to step 5.

- 3 For the X12 standard, define how your company wants to reconcile FAs to original documents (see “X12 Settings” on page 195).



- Validate Group Version—Indicate if the group version in the acknowledgement should be considered when determining which document is to be reconciled.
- Always Reconcile Last Group—Indicate how to reconcile FAs that match duplicate group IDs. Forces reconciliation against the last group sent.

Note: If not checked, Inovisworks generates an error.

- Allow Re-Reconcile—Indicate how to handle acknowledgements that match already acknowledged documents. Forces re-reconciliation using the latest acknowledgement.

Note: If not checked, Inovisworks ignores the second acknowledgement.

- 4 You have completed the settings page for the X12 standard. Go to step 7.

- 5 For the EDIFACT standard, define how your company wants to reconcile FAs to original documents (see “EDIFACT Settings” on page 195).

Validate Message Version:	<input type="checkbox"/>	Indicates whether the message version in t
Reconcile Last Sent Interchange:	<input type="checkbox"/>	Indicates how to handle acknowledgements against the last sent interchange.
Accept Only EDIFACT Acknowledgement Codes 4, 7, and 8:	<input checked="" type="checkbox"/>	The codes mean: 4—This level and all lower received. Reject all other codes.

- **Validate Message Version**—Indicate if the message version in the acknowledgement should be considered when determining which document is to be reconciled.
- **Reconcile Last Sent Interchange**—Indicate how to handle acknowledgements that match duplicate interchange IDs. Forces reconciliation against the last sent interchange.

Note: If not checked, Inovisworks generates a duplicate interchange error when it finds duplicates.

- **Accept Only EDIFACT Acknowledgement Codes 4, 7, and 8**—
 If checked, Inovisworks accepts only EDIFACT acknowledgement codes 4, 7, and 8 from element 0083.
 - 4—This level and all lower levels rejected
 - 7—This level and all lower levels acknowledged (if the level is not rejected)
 - 8—Interchange received

If not checked, Inovisworks accepts these codes:

- 1—EDIFACT acknowledgment all good
- 2—EDIFACT acknowledgment error detected
- 3—EDIFACT acknowledgment errored at low levels
- 5—EDIFACT acknowledgment header OK
- 6—EDIFACT acknowledgment header bad

If not checked, all other codes will cause an “illegal status code” error.

- 6 You have completed the settings page for the EDIFACT standard. Go to step 7.
- 7 Click **Step 3**.
 The Timeouts and Alerts page opens.
- 8 Go “To define business hours, and timeout and event notification settings” on page 191.

To define business hours, and timeout and event notification settings

Begin this procedure after completing step 7 in “To define settings based on document standard (X12 or EDIFACT)” on page 190.

- 1 In Time Based On, select the business hour configuration you want to use. Inovisworks applies or “counts” timeout periods only during the business hours specified in the configuration.

Note: If blank, Inovisworks runs based on a 24 hour clock (that is, seven days a week, 24 hours a day).

- 2 In Timeout Settings, select Enabled to activate the first timeout setting (see “FA Reconciliation Field Descriptions (Page 3 of 3)” on page 196).
 - a Timeout Type—Select the status to which you want the original document changed if a timeout occurs.

Select Warning to change the status of original documents to Warning when a timeout occurs.

Select Violation to change the status of original documents to Violation when a timeout occurs.

- b Reference Date—Select the date to start the timeout period.

- Original Document Processed Date—Date Inovisworks processed the original document.
 - Extract Date from Original Document—Date extracted from the original document. Select the date code field from the drop-down list; for example, 068—Current Schedule Ship.

Note: Inovisworks uses the Reference Date and the “Timeout Interval” to calculate the timeout time.

- c Timeout Interval—Indicate the interval of time, in days and minutes or hours, between the “Reference Date” and when the timeout is to occur.

If an FA is not received within 15 minutes of the original document’s processed date, a timeout situation will exist.

- d Select the Before or After options to indicate if the timeout is to occur before or after the Reference Date (for an example, see “Timeout Interval” on page 196).
 - Note:** Inoivisworks uses the Timeout Interval and the “Reference Date” to calculate the timeout time.
 - e Send Alert To—Indicate if your company wants an alert to be sent to your company (sender) or to your trading partner (receiver) if a timeout occurs.
 - f To define Timeouts 2 and 3, repeat step 2.
- 3 In Event Notification Settings, indicate who should be notified based on the processing of the acknowledgement. For example, if the first checkbox is selected, Inoivisworks notifies the sender of the original document (your company) each time an acknowledgement with an Accepted status is received.

Notify if Accepted:	<input checked="" type="checkbox"/> Sender of Original Document
	<small>Indicates whether acknowledgement rejected alerts will be sent to the sender of the original doc. Notification.</small>
Notify if Not Matched:	<input checked="" type="checkbox"/> Sender of Original Document <input checked="" type="checkbox"/> Receiver of Original Document
	<small>Indicates whether acknowledgement not matched alerts will be sent to the sender of the original Recipients for this alert type are configured in Event Notification.</small>
Notify if Rejected:	<input checked="" type="checkbox"/> Sender of Original Document
	<small>Indicates whether acknowledgement rejected alerts will be sent to the sender of the original doc. Notification.</small>
Notify if Other Error:	<input checked="" type="checkbox"/> Sender of Original Document <input checked="" type="checkbox"/> Receiver of Original Document
	<small>Indicates whether alerts for other acknowledgement errors will be sent to the sender of the orig. Recipients for this alert type are configured in Event Notification.</small>

Important: Email addresses must be defined separately (see “Setting up Email Addresses for FA Event Notifications” on page 198).

- 4 Click **Complete**.
The page lists the FA reconciliation settings selected for the account (PSN).
- 5 If necessary, click **Previous** to adjust any settings.
- 6 When you are satisfied the settings are accurate, click **Complete**.
The FA reconciliation setting is added to the Ack Reconciliation List page.
- 7 To complete the FA reconciliation set up process, go to “Stage 2—Setting up Email Addresses in Event Notification Configurations” on page 197

FA Reconciliation Field Descriptions (Page 1 of 3)

These fields display on the first FA Reconciliation page.

Section/Field	Type or Select
General Settings	
Active Status	To activate the configuration.
*Configuration Name	Describes the name of the FA reconciliation configuration, such as 850s for Acme Company.
Original Document Settings	
Direction	Direction of the original document in the context of Inoivisworks. Outbound means the original document was sent by your company to your trading partner.

Section/Field	Type or Select
Standard	Standard to which the FA reconciliation settings are to be applied; for example, EDI-X12, EDI-EDIFACT, or any other supported standard.
Transaction Types	Transaction types for the outgoing document to be reconciled; for example, 850 for a purchase order or 810 for an invoice. <ul style="list-style-type: none"> ■ All—Perform reconciliation on all types of outgoing documents. ■ Only Selected Types—Perform reconciliation on only the outgoing documents that are selected. Click Ctrl to select multiple document types.
<ul style="list-style-type: none"> ■ Customer Defined 	Transaction types that are unique to your company, one per line.
Sender ID/Qualifier	For your company, sender IDs and qualifiers for which to reconcile outgoing documents. <ul style="list-style-type: none"> ■ All—Reconcile outgoing documents for all sender ID/qualifiers. ■ Only Selected—Reconcile outgoing documents only if the sender ID/qualifier is selected. ■ Exclude Selected—Reconcile outgoing documents for all sender IDs/qualifiers except those that are selected.
<ul style="list-style-type: none"> ■ Customer Defined 	For your company, additional criteria, such as group ID/qualifier and group version. <p>Format</p> Brackets mean optional. No spaces are allowed. <ul style="list-style-type: none"> ■ SenderID [/SenderQual] [: [GroupID [/GroupQual]] [:GroupVersion]] <p>Examples</p> <ul style="list-style-type: none"> ■ SenderID/SenderQual:SenderGroupID/SenderGroupQual:GroupVersion (Complete information) ■ SenderID/SenderQual:SenderGroupID:GroupVersion (Group qualifier is optional) ■ SenderID/SenderQual:SenderGroupID (Version is optional) ■ SenderID/SenderQual::GroupVersion (Group ID/qualifier is optional) <p>Important: Note the use of the double colons (::).</p> <ul style="list-style-type: none"> ■ SenderID:SenderGroupID/SenderGroupQual:GroupVersion (IC qualifier is optional)
Receiver ID/Qualifier	For your trading partner, receiver IDs and qualifiers for which to reconcile outgoing documents. <ul style="list-style-type: none"> ■ All—Reconcile outgoing documents for all receiver ID/qualifiers. ■ Only Selected—Reconcile outgoing documents only if the receiver ID/qualifier is selected. ■ Exclude Selected—Reconcile outgoing documents for all receiver IDs/qualifiers except those that are selected. Type receiver IDs/qualifiers, one per line, in the text box.

Section/Field	Type or Select
Return Document Settings	
Transaction Types	Based on the standard, the abbreviation for the return document. In X12, FAs are 997; in EDIFACT, FAs are CONTRL. Note: This field is populated only in Edit mode.

FA Reconciliation Field Descriptions (Page 2 of 3)

These fields display on the second FA Reconciliation page.

Section/Field	Type or Select
Reconciliation Provider	System that will reconcile FAs to the original documents.
X12 Settings	
Validate Group Version	To indicate if the group version in the acknowledgement should be considered when determining which document is to be reconciled.
Always Reconcile Last Group	To indicate how to reconcile FAs that match duplicate group IDs. Forces reconciliation against the last group sent. Note: If not checked, Inovisworks generates an error.
Allow Re-Reconcile	To indicate how to handle acknowledgements that match already acknowledged documents. Forces re-reconciliation using the latest acknowledgement. Note: If not checked, Inovisworks ignores the second acknowledgement.
EDIFACT Settings	
Validate Message Version	To indicate if the message version in the acknowledgement should be considered when determining which document is to be reconciled.
Reconcile Last Sent Interchange	To indicate how to handle acknowledgements that match duplicate interchange IDs. Forces reconciliation against the last sent interchange. Note: If not checked, Inovisworks generates a duplicate interchange error.
Accept Only EDIFACT Acknowledgement Codes 4, 7, and 8	<ul style="list-style-type: none"> ■ If checked, Inovisworks accepts only EDIFACT acknowledgement codes 4, 7, and 8 from element 0083. <ul style="list-style-type: none"> ■ 4—This level and all lower levels rejected ■ 7—This level and all lower levels acknowledged (if the level is not rejected) ■ 8—Interchange received ■ If <i>not</i> checked, Inovisworks accepts these codes: <ul style="list-style-type: none"> ■ 1—EDIFACT acknowledgment all good ■ 2—EDIFACT acknowledgment error detected ■ 3—EDIFACT acknowledgment errored at low levels ■ 5—EDIFACT acknowledgment header OK ■ 6—EDIFACT acknowledgment header bad If <i>not</i> checked, all other codes will cause an “illegal status code” error.

FA Reconciliation Field Descriptions (Page 3 of 3)

These fields display on the third FA Reconciliation page.

Section/Field	Type or Select
Time Based On	<p>If business hours have been defined, the business hour configuration you want to use. Inoivisworks applies or “counts” timeout periods only during the business hours specified in the configuration.</p> <p>If blank, Inoivisworks runs based on a 24 hour clock (seven days a week, 24 hours a day).</p>
Timeout Settings	
Enabled	To activate the timeout setting.
Timeout Type	<p>Status to which you want the original document changed if a timeout occurs:</p> <ul style="list-style-type: none"> ■ Warning—Change the document’s status to Warning. ■ Violation—Change the document’s status to Violation.
Reference Date	<p>Date the timeout for the expected acknowledgement is to start.</p> <ul style="list-style-type: none"> ■ Original Document Processed Date—Date Inoivisworks processed the original document. ■ Extract Date from Original Document—Date that is extracted from the original document. Select the date code field from the drop-down list; for example, 068—Current Schedule Ship. <p>Note: Inoivisworks uses the Reference Date and the “Timeout Interval” to calculate the timeout time.</p>
Timeout Interval	<p>Interval of time, in days and hours, between the “Reference Date” and the time when the acknowledgement has exceeded an acceptable timeframe in which to be received.</p> <ul style="list-style-type: none"> ■ Before—Timeout is to occur before the Reference Date. Example: If the Reference Date is 010—Requested Ship and your company must receive an acknowledgement before that date, the Timeout Interval should be <i>before</i> the Reference Date. ■ After—Timeout is to occur after the Reference Date. <p>Note: Inoivisworks uses the Time Interval and the “Reference Date” to calculate the timeout time.</p>
Send Alert To	<p>Send an alert that a timeout has occurred to:</p> <ul style="list-style-type: none"> ■ Sender of Original Document ■ Receiver of Original Document
Timeout 2 Timeout 3	See “Timeout Settings” on page 196.
Event Notification Settings	
Notify if Accepted	<p>Notify the sender of the original document each time an acknowledgement with an Accepted status is received.</p> <p>Important: Set up email addresses to which notifications will be sent from Administration tab > Event Notification > Configure Event Notifications.</p>

Section/Field	Type or Select
Notify if Not Matched	Notify the sender or receiver of the original document each time an acknowledgement is <i>not matched</i> to an original document. Important: Set up email addresses to which notifications will be sent from Administration tab > Event Notification > Configure Event Notifications .
Notify if Rejected	Notify the sender of the original document each time an acknowledgement with a Rejected status is received. Important: Set up email addresses to which notifications will be sent from Administration tab > Event Notification > Configure Event Notifications .
Notify if Other Errors	Notify the sender or receiver of the original document each time an <i>error occurred</i> during acknowledgement processing. Important: Set up email addresses to which notifications will be sent from Administration tab > Event Notification > Configure Event Notifications .

Stage 2—Setting up Email Addresses in Event Notification Configurations

The second stage of the FA reconciliation setup process is to define event notification configurations. The configurations specify the email addresses to which FA notifications will be sent.

- “FA Settings and Corresponding FA Event Groups” on page 197
- “Setting up Email Addresses for FA Event Notifications” on page 198

FA Settings and Corresponding FA Event Groups

The timeout type and event notification settings defined in “Stage 1—Setting up FA Reconciliation Settings for Original Documents” correspond to specific FA event groups in event notification.

Timeout Types and Event Notification Settings relate to FA event groups you can select when defining event notification configurations.

An *event group* is a set of related events, such as document errors. For example, if your company wants to be notified when it gets an FA that rejects an original document (Notify if Rejected is selected in Event Notification Settings), the “Ack Reject for Org Doc Sender” event group must be selected when defining event notification configurations.

Event notification configurations specify the email addresses to which notifications will be sent.

The table shows how FA reconciliation settings correspond to FA event groups in event notification.

When these options are selected in FA reconciliation settings...	Use this FA event group when defining email addresses in event notification configurations...	Emails can be sent to...
Timeout Type Settings		
Warning	<ul style="list-style-type: none"> ■ Ack Warning Timeout for Org Doc Sender ■ Ack Warning Timeout for Org Doc Receiver 	<ul style="list-style-type: none"> ■ Sender ■ Receiver
Violation	<ul style="list-style-type: none"> ■ Ack Violation Timeout for Org Doc Sender ■ Ack Violation Timeout for Org Doc Receiver 	<ul style="list-style-type: none"> ■ Sender ■ Receiver
Event Notification Settings		
Notify if Accepted	<ul style="list-style-type: none"> ■ Ack Accepted for Org Doc Sender 	<ul style="list-style-type: none"> ■ Sender
Notify if Not Matched	<ul style="list-style-type: none"> ■ Ack Not Matched for Org Doc Sender ■ Ack Not Matched for Org Doc Receiver 	<ul style="list-style-type: none"> ■ Sender ■ Receiver
Notify if Rejected	<ul style="list-style-type: none"> ■ Ack Reject for Org Doc Sender 	<ul style="list-style-type: none"> ■ Sender
Notify if Other Errors	<ul style="list-style-type: none"> ■ Other Ack Error for Org Doc Sender ■ Other Ack Error for Org Doc Receiver 	<ul style="list-style-type: none"> ■ Sender ■ Receiver

Important: If your trading partner (receiver) is to get event notifications, email addresses must be set up for the events that correspond to the receiver’s acknowledgement reconciliation settings. The email addresses are defined in an event notification configuration.

Setting up Email Addresses for FA Event Notifications

See “Setting up Event Notifications for FA Events” on page 125.

Set Up Process Complete

After completing the two stages in the FA reconciliation set up process, Inovisworks reconciles FAs to original documents you send to your trading partners.

Use the Document Tracking tab to view and track FAs (see “Tracking Functional Acknowledgements” on page 63).

Filtering Existing FA Reconciliation Settings

To filter existing FA Reconciliation settings

- 1 Select the account (PSN) that subscribes to FA reconciliation.
- 2 Click the **Administration** tab > **Ack Reconciliation**.

The Acknowledgement List page opens.

3 Click **Filter**.

4 Select the criteria for the filter > click **Apply** (see “Reconciliation Filter List Field Descriptions” on page 199).

The results of your search display.

Reconciliation Filter List Field Descriptions

Field	Type or Select
Ack Reconciliation Filter	
Reconciliation ID	Identifier for the configuration.
Active Status	Status of the configuration, active or inactive.
Original Document Settings	
Standard	EDI standard by which you want to filter the list; for example, X12 or EDIFACT.
Document Type	Transaction types by which you want to filter the list; for example, 850 for a purchase order or 810 for an invoice.
Sender ID/Qualifier	Sender ID and qualifier by which you want to filter the list.
Receiver ID/Qualifier	Receiver ID and qualifier by which you want to filter the list.

Editing FA Reconciliation Settings for Original Documents

To edit FA reconciliation settings for an original document

- 1 Select the account (PSN) that subscribes to FA reconciliation.
- 2 Click the **Administration** tab > **Ack Reconciliation**.

- 3** Select the configuration > click **Edit**.
- 4** Modify the information as needed, clicking **Step**, **Previous**, or **Finish** until you have updated the configuration.

- 5** Click **Complete**.

The page lists the updated FA reconciliation settings for the original document.

- 6** Click **Finish**.

You have updated the configuration.

Viewing FA Reconciliation Settings for Original Documents

To view FA reconciliation settings for an original document

- 1** Select the account (PSN) that subscribes to FA reconciliation.
- 2** Click the **Administration** tab > **Ack Reconciliation**.
- 3** Select the configuration > click **View**.
The current configuration settings display.
- 4** If you want to modify the information, click **Edit** and go to step 4 in “Editing FA Reconciliation Settings for Original Documents” on page 199.

Deleting FA Reconciliation Settings for Original Documents

To delete FA reconciliation settings for an original document

- 1** Select the account (PSN) that subscribes to FA reconciliation.
- 2** Click the **Administration** tab > **Ack Reconciliation**.
- 3** Select the configuration > click **Delete**.
- 4** Click **Confirm Delete**.

Glossary

Account Admin role An external role assigned to a person responsible for managing specific accounts (PSNs). The Account Admin role has limited access to information and administrative functions the assigned account (PSN).

Account User role This role is assigned to a person responsible for maintaining specific accounts (PSNs). The Account User roles has limited access only to those accounts (PSN) assigned.

Application assigned number A reference number for an Inbound file; for example, PO Number.

AS1 / AS2 Applicability Statement 1 (AS1) and Applicability Statement 2 (AS2) are secure methods for transferring encrypted data across the Internet.

Breadcrumbs Links that display across the top of Inoivisworks page showing where you are in the application and how you got there. By clicking on a link (a breadcrumb) you return to the page selected.

Charge type An invoice line item indicating the type of charge.

Customer Admin role The role assigned to a person responsible for setting up and maintaining User roles and functions within a company.

Customer ID A nine-digit number identifying an Inoivisworks customer. More than one account can be associated with a single customer ID.

Customer User role A role assigned by the Customer Admin. Customer User roles are confined to those accounts for which she or he is responsible.

Document In Inoivisworks, the word “document” means an “interchange” or a transaction.”

Document ID A numeric identifier assigned to a document at the Interchange level. A Document ID is variable length and assigned by Inoivisworks for each Interchange.

Document status The status of a document on the GXS network. For example, Available, Received, Hold, etc. See “Status Definitions” on page 203.

Document type The type of document, such as Purchase Order (PO) or Invoice (IN).

Event An action performed on a document as it travels through the GXS network. For example, Enter Gateway, Validate, or Received/Interconnected.

Event Tracking graph A graph showing document events and status. Using color-coded nodes a document's progress is tracked through the GXS network and shown in graph form.

Fromvan FTP folders, automatically created by GXS, used to store EDI transactions ready to be retrieved.

File Transfer Protocol FTP—used to transfer large files.

FTP Outbound Service An GXS service which automatically sends documents to a receiver's FTP server. Customers who register for this service do not need perform an FTP pull.

FTP Pull Trading Partner documents retrieved by using the FTP pull commands, such as **fromvan/get< filename>**.

FTP push Trading Partner documents are sent using FTP push commands, such as **tovan/put <filename>**.

Functions Tasks users perform while working in Inoivisworks. Functions available to a user depend on his or her defined role.

Gateways Document exchange servers. Inoivisworks customers exchange documents using FTP, Pipeline, X400, EDI-INT, and UCCNet gateways.

Hold Status The sender of an outbound document can put a document on hold, making it unavailable to the Trading Partner.

Inbound documents Documents sent to you from your Trading Partner.

Inoivisworks GXS' value added network (VAN), which securely exchanges information regardless of data type, network, or connectivity standards.

Interconnect Another public or private network Inoivisworks uses to transfer data.

Managed Services A suite of managed services providing message brokering, hosted data transformation, web forms, and business process services.

Mailbag A file containing bundled data, used by VANs to transmit and track large amounts of data.

Non-peak time Between 8 p.m. and 6 a.m., Monday through Friday, Eastern Standard Time (EST), and all day Saturday and Sunday, when there is less traffic on GXS:Access.

Online Enabled An online Inoivisworks service offering, such as Access:OnRamp.

OnRamp Free connectivity software, available through the Inoivisworks.

Outbound documents Documents sent from your company to a Trading Partner.

Outbound FTP custom file names File names automatically created by GXS to store outbound documents in the FTP directory.

Product service number (PSN) A unique nine-digit account number. An account represents the GXS software owned by or service subscribed to by the customer.

Peak time Between 6 a.m. and 8 p.m., Monday through Friday, EST, when the heaviest network traffic occurs.

Qualifier Designates the sender and receiver IDs of Trading Partners. A ZZ qualifier means the sender and receiver ID is mutually defined by the Trading Partners.

Queue Where documents “wait their turn” to be sent or received.

Required fields Indicated by an asterisk (*), these fields must contain information.

Roles Defines functions or tasks available to users of Inoivisworks. Each user is assigned a role.

Service charge The cost of an GXS service mailbox.

Status Definitions

Document Status	Description
In-Progress	Documents presently processing through Inoivisworks.
Available	All documents in a mailbox and available for pickup by the recipient.
Received	Document was received.
Hold	Sender, receiver, or a document rule placed a document on hold. This makes the document unavailable.
System Hold	Inoivisworks put the document on hold because the sender’s or receiver’s account has a Delinquent or Cancel status. Call the GXS billing department to reactivate the account.
Duplicate	Duplication of a document already sent.
Redirected	Document has been redirected within Inoivisworks.
Modified	Original document was changed before being sent.
Pending Mailbag	Document is waiting to be placed inside a mailbag.
Pending Comm	Document has been mailbagged, and the mailbag is waiting to be sent.
In-Progress Ignored	Document is on a system that is down. When the system comes back up, the document status changes to In-Progress.
Comm-Error	Document did not reach its recipient. Communications errors occur if: <ul style="list-style-type: none">■ the database is down or the connection to the database is lost.■ your gateway connection is incorrect or lost.■ a sender transmits a non-EDI document to a receiver who uses async/bisync communications to get documents.
Data Syntax Error	Document data is not formatted to standard.
Data Validation Error	Document has an invalid receiver.
Rules Engine Error	The rules engine encountered an error.
Processing Error	An error other than communication, data syntax, data validation, or rules engine error.

T o v a n The FTP directory used to store EDI data files ready to send to a Trading Partner via Inoivisworks.

T r a d i n g p a r t n e r A company with whom your company exchanges documents.

T r a d i n g p r o f i l e The Trading Partner's company information, including trading ID, billing address, and contacts.

T r a n s a c t i o n S u m m a r y G r a p h A color-coded graph showing the number and status of documents. Each Document Type, such as an invoice, is represented by a color.

U s a g e c h a r g e The fees for using an GXS service. Usage charges are based on:

- GXS service used.
- Number of documents sent and received during peak or off-peak hours.
- Number of characters sent and received during peak or off-peak hours.
- Number of Trading Partners.
- Other trading network connections.

U s e r r o l e s User roles define what functions/tasks users can perform in Inoivisworks. These user roles defined by Inoivisworks are:

- Customer Admin
- Customer User

V a l u e a d d e d p r o c e s s A process that adds value during a document exchange. For example, AS/2 connectivity link or X400 connectivity link.

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