

Informatica® B2B Data Exchange 10.2.1

Release Guide

Informatica B2B Data Exchange Release Guide
10.2.1
December 2017

© Copyright Informatica LLC 2001, 2018

This software and documentation contain proprietary information of Informatica LLC and are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright law. Reverse engineering of the software is prohibited. No part of this document may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording or otherwise) without prior consent of Informatica LLC. This Software may be protected by U.S. and/or international Patents and other Patents Pending.

Use, duplication, or disclosure of the Software by the U.S. Government is subject to the restrictions set forth in the applicable software license agreement and as provided in DFARS 227.7202-1(a) and 227.7702-3(a) (1995), DFARS 252.227-7013©(1)(ii) (OCT 1988), FAR 12.212(a) (1995), FAR 52.227-19, or FAR 52.227-14 (ALT III), as applicable.

The information in this product or documentation is subject to change without notice. If you find any problems in this product or documentation, please report them to us in writing.

Informatica, Informatica Platform, Informatica Data Services, PowerCenter, PowerCenterRT, PowerCenter Connect, PowerCenter Data Analyzer, PowerExchange, PowerMart, Metadata Manager, Informatica Data Quality, Informatica Data Explorer, Informatica B2B Data Transformation, Informatica B2B Data Exchange Informatica On Demand, Informatica Identity Resolution, Informatica Application Information Lifecycle Management, Informatica Complex Event Processing, Ultra Messaging, Informatica Master Data Management, and Live Data Map are trademarks or registered trademarks of Informatica LLC in the United States and in jurisdictions throughout the world. All other company and product names may be trade names or trademarks of their respective owners.

Portions of this software and/or documentation are subject to copyright held by third parties, including without limitation: Copyright DataDirect Technologies. All rights reserved. Copyright © Sun Microsystems. All rights reserved. Copyright © RSA Security Inc. All Rights Reserved. Copyright © Ordinal Technology Corp. All rights reserved. Copyright © Aandacht c.v. All rights reserved. Copyright Genivia, Inc. All rights reserved. Copyright Isomorphic Software. All rights reserved. Copyright © Meta Integration Technology, Inc. All rights reserved. Copyright © Intalio. All rights reserved. Copyright © Oracle. All rights reserved. Copyright © Adobe Systems Incorporated. All rights reserved. Copyright © DataArt, Inc. All rights reserved. Copyright © ComponentSource. All rights reserved. Copyright © Microsoft Corporation. All rights reserved. Copyright © Rogue Wave Software, Inc. All rights reserved. Copyright © Teradata Corporation. All rights reserved. Copyright © Yahoo! Inc. All rights reserved. Copyright © Glyph & Cog, LLC. All rights reserved. Copyright © Thinkmap, Inc. All rights reserved. Copyright © Clearpace Software Limited. All rights reserved. Copyright © Information Builders, Inc. All rights reserved. Copyright © OSS Nokalva, Inc. All rights reserved. Copyright Edifecs, Inc. All rights reserved. Copyright Cleo Communications, Inc. All rights reserved. Copyright © International Organization for Standardization 1986. All rights reserved. Copyright © ej-technologies GmbH. All rights reserved. Copyright © Jaspersoft Corporation. All rights reserved. Copyright © International Business Machines Corporation. All rights reserved. Copyright © yWorks GmbH. All rights reserved. Copyright © Lucent Technologies. All rights reserved. Copyright © University of Toronto. All rights reserved. Copyright © Daniel Veillard. All rights reserved. Copyright © Unicode, Inc. Copyright IBM Corp. All rights reserved. Copyright © MicroQuill Software Publishing, Inc. All rights reserved. Copyright © PassMark Software Pty Ltd. All rights reserved. Copyright © LogiXML, Inc. All rights reserved. Copyright © 2003-2010 Lorenzi Davide, All rights reserved. Copyright © Red Hat, Inc. All rights reserved. Copyright © The Board of Trustees of the Leland Stanford Junior University. All rights reserved. Copyright © EMC Corporation. All rights reserved. Copyright © Flexera Software. All rights reserved. Copyright © Jinfonet Software. All rights reserved. Copyright © Apple Inc. All rights reserved. Copyright © Telerik Inc. All rights reserved. Copyright © BEA Systems. All rights reserved. Copyright © PDFlib GmbH. All rights reserved. Copyright © Orientation in Objects GmbH. All rights reserved. Copyright © Tanuki Software, Ltd. All rights reserved. Copyright © Ricebridge. All rights reserved. Copyright © Sencha, Inc. All rights reserved. Copyright © Scalable Systems, Inc. All rights reserved. Copyright © jQWidgets. All rights reserved. Copyright © Tableau Software, Inc. All rights reserved. Copyright© MaxMind, Inc. All Rights Reserved. Copyright © TMate Software s.r.o. All rights reserved. Copyright © MapR Technologies Inc. All rights reserved. Copyright © Amazon Corporate LLC. All rights reserved. Copyright © Highsoft. All rights reserved. Copyright © Python Software Foundation. All rights reserved. Copyright © BeOpen.com. All rights reserved. Copyright © CNRI. All rights reserved.

This product includes software developed by the Apache Software Foundation (http://www.apache.org/), and/or other software which is licensed under various versions of the Apache License (the "License"). You may obtain a copy of these Licenses at http://www.apache.org/licenses/. Unless required by applicable law or agreed to in writing, software distributed under these Licenses is distributed on an "AS IS" BASIS, WITHOUT WARRANTIES OR CONDITIONS OF ANY KIND, either express or implied. See the Licenses for the specific language governing permissions and limitations under the Licenses.

This product includes software which was developed by Mozilla (http://www.mozilla.org/), software copyright The JBoss Group, LLC, all rights reserved; software copyright © 1999-2006 by Bruno Lowagie and Paulo Soares and other software which is licensed under various versions of the GNU Lesser General Public License Agreement, which may be found at http:// www.gnu.org/licenses/lgpl.html. The materials are provided free of charge by Informatica, "as-is", without warranty of any kind, either express or implied, including but not limited to the implied warranties of merchantability and fitness for a particular purpose.

The product includes ACE(TM) and TAO(TM) software copyrighted by Douglas C. Schmidt and his research group at Washington University, University of California, Irvine, and Vanderbilt University, Copyright (©) 1993-2006, all rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (copyright The OpenSSL Project. All Rights Reserved) and redistribution of this software is subject to terms available at http://www.openssl.org and http://www.openssl.org/source/license.html.

This product includes Curl software which is Copyright 1996-2013, Daniel Stenberg, <daniel@haxx.se>. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at http://curl.haxx.se/docs/copyright.html. Permission to use, copy, modify, and distribute this software for any purpose with or without fee is hereby granted, provided that the above copyright notice and this permission notice appear in all copies.

The product includes software copyright 2001-2005 (©) MetaStuff, Ltd. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at http://www.dom4j.org/ license.html.

The product includes software copyright © 2004-2007, The Dojo Foundation. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at http://dojotoolkit.org/license.

This product includes ICU software which is copyright International Business Machines Corporation and others. All rights reserved. Permissions and limitations regarding this software are subject to terms available at http://source.icu-project.org/repos/icu/icu/trunk/license.html.

This product includes software copyright © 1996-2006 Per Bothner. All rights reserved. Your right to use such materials is set forth in the license which may be found at http:// www.gnu.org/software/ kawa/Software-License.html.

This product includes OSSP UUID software which is Copyright © 2002 Ralf S. Engelschall, Copyright © 2002 The OSSP Project Copyright © 2002 Cable & Wireless Deutschland. Permissions and limitations regarding this software are subject to terms available at http://www.opensource.org/licenses/mit-license.php.

This product includes software developed by Boost (http://www.boost.org/) or under the Boost software license. Permissions and limitations regarding this software are subject to terms available at http:/ /www.boost.org/LICENSE_1_0.txt.

This product includes software copyright © 1997-2007 University of Cambridge. Permissions and limitations regarding this software are subject to terms available at http:// www.pcre.org/license.txt.

This product includes software copyright © 2007 The Eclipse Foundation. All Rights Reserved. Permissions and limitations regarding this software are subject to terms available at http:// www.eclipse.org/org/documents/epl-v10.php and at http://www.eclipse.org/org/documents/edl-v10.php.

This product includes software licensed under the terms at http://www.tcl.tk/software/tcltk/license.html, http://www.bosrup.com/web/overlib/?License, http://www.stlport.org/doc/ license.html, http://asm.ow2.org/license.html, http://www.cryptix.org/LICENSE.TXT, http://hsqldb.org/web/hsqlLicense.html, http://httpunit.sourceforge.net/doc/ license.html, http://jung.sourceforge.net/license.txt , http://www.gzip.org/zlib/zlib_license.html, http://www.openldap.org/software/release/license.html, http://www.libssh2.org, http://slf4j.org/license.html, http://www.sente.ch/software/OpenSourceLicense.html, http://fusesource.com/downloads/license-agreements/fuse-message-broker-v-5-3- license-agreement; http://antlr.org/license.html; http://aopalliance.sourceforge.net/; http://www.bouncycastle.org/licence.html; http://www.jgraph.com/jgraphdownload.html; http://www.jcraft.com/jsch/LICENSE.txt; http://jotm.objectweb.org/bsd_license.html; . http://www.w3.org/Consortium/Legal/2002/copyright-software-20021231; http://www.slf4j.org/license.html; http://nanoxml.sourceforge.net/orig/copyright.html; http://www.json.org/license.html; http://forge.ow2.org/projects/javaservice/, http://www.postgresql.org/about/licence.html, http://www.sqlite.org/copyright.html, http://www.tcl.tk/software/tcltk/license.html, http://www.jaxen.org/faq.html, http://www.jdom.org/docs/faq.html, http://www.slf4j.org/license.html; http://www.iodbc.org/dataspace/iodbc/wiki/iODBC/License; http://www.keplerproject.org/md5/license.html; http://www.toedter.com/en/jcalendar/license.html; http://www.edankert.com/bounce/index.html; http://www.net-snmp.org/about/license.html; http://www.openmdx.org/#FAQ; http://www.php.net/license/3_01.txt; http://srp.stanford.edu/license.txt; http://www.schneier.com/blowfish.html; http://www.jmock.org/license.html; http://xsom.java.net; http://benalman.com/about/license/; https://github.com/CreateJS/EaselJS/blob/master/src/easeljs/display/Bitmap.js; http://www.h2database.com/html/license.html#summary; http://jsoncpp.sourceforge.net/LICENSE; http://jdbc.postgresql.org/license.html; http://protobuf.googlecode.com/svn/trunk/src/google/protobuf/descriptor.proto; https://github.com/rantav/hector/blob/master/LICENSE; http://web.mit.edu/Kerberos/krb5-current/doc/mitK5license.html; http://jibx.sourceforge.net/jibx-license.html; https://github.com/lyokato/libgeohash/blob/master/LICENSE; https://github.com/hjiang/jsonxx/blob/master/LICENSE; https://code.google.com/p/lz4/; https://github.com/jedisct1/libsodium/blob/master/LICENSE; http://one-jar.sourceforge.net/index.php?page=documents&file=license; https://github.com/EsotericSoftware/kryo/blob/master/license.txt; http://www.scala-lang.org/license.html; https://github.com/tinkerpop/blueprints/blob/master/LICENSE.txt; http://gee.cs.oswego.edu/dl/classes/EDU/oswego/cs/dl/util/concurrent/intro.html; https://aws.amazon.com/asl/; https://github.com/twbs/bootstrap/blob/master/LICENSE; https://sourceforge.net/p/xmlunit/code/HEAD/tree/trunk/LICENSE.txt; https://github.com/documentcloud/underscore-contrib/blob/master/LICENSE, and https://github.com/apache/hbase/blob/master/LICENSE.txt.

This product includes software licensed under the Academic Free License (http://www.opensource.org/licenses/afl-3.0.php), the Common Development and Distribution License (http://www.opensource.org/licenses/cddl1.php) the Common Public License (http://www.opensource.org/licenses/cpl1.0.php), the Sun Binary Code License Agreement Supplemental License Terms, the BSD License (http:// www.opensource.org/licenses/bsd-license.php), the new BSD License (http://opensource.org/licenses/BSD-3-Clause), the MIT License (http://www.opensource.org/licenses/mit-license.php), the Artistic License (http://www.opensource.org/licenses/artistic-license-1.0) and the Initial Developer's Public License Version 1.0 (http://www.firebirdsql.org/en/initial-developer-s-public-license-version-1-0/).

This product includes software copyright © 2003-2006 Joe Walnes, 2006-2007 XStream Committers. All rights reserved. Permissions and limitations regarding this software are subject to terms available at http://xstream.codehaus.org/license.html. This product includes software developed by the Indiana University Extreme! Lab. For further information please visit http://www.extreme.indiana.edu/.

This product includes software Copyright (c) 2013 Frank Balluffi and Markus Moeller. All rights reserved. Permissions and limitations regarding this software are subject to terms of the MIT license.

See patents at https://www.informatica.com/legal/patents.html.

DISCLAIMER: Informatica LLC provides this documentation "as is" without warranty of any kind, either express or implied, including, but not limited to, the implied warranties of noninfringement, merchantability, or use for a particular purpose. Informatica LLC does not warrant that this software or documentation is error free. The information provided in this software or documentation may include technical inaccuracies or typographical errors. The information in this software and documentation is subject to change at any time without notice.

NOTICES

This Informatica product (the "Software") includes certain drivers (the "DataDirect Drivers") from DataDirect Technologies, an operating company of Progress Software Corporation ("DataDirect") which are subject to the following terms and conditions:

1. THE DATADIRECT DRIVERS ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT.
2. IN NO EVENT WILL DATADIRECT OR ITS THIRD PARTY SUPPLIERS BE LIABLE TO THE END-USER CUSTOMER FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL OR OTHER DAMAGES ARISING OUT OF THE USE OF THE ODBC DRIVERS, WHETHER OR NOT INFORMED OF THE POSSIBILITIES OF DAMAGES IN ADVANCE. THESE LIMITATIONS APPLY TO ALL CAUSES OF ACTION, INCLUDING, WITHOUT LIMITATION, BREACH OF CONTRACT, BREACH OF WARRANTY, NEGLIGENCE, STRICT LIABILITY, MISREPRESENTATION AND OTHER TORTS.

Publication Date: 2018-09-25

Table of Contents

Preface 6

Informatica Resources 6

- Informatica Network 6
- Informatica Knowledge Base 6
- Informatica Documentation 6
- Informatica Product Availability Matrixes 7
- Informatica Velocity 7
- Informatica Marketplace 7
- Informatica Global Customer Support 7

Chapter 1: Version 10.2.1 8

New Features and Enhancements 8

Chapter 2: Version 10.2 9

New Features and Enhancements 9

Chapter 3: Version 10.1 11

New Features and Enhancements 11

Chapter 4: Version 10.0 13

New Features and Enhancements 13

Chapter 5: Version 9.6.2 14

New Features and Enhancements 14

Chapter 6: Version 9.6.1 HF1 15

New Features and Enhancements 15

- Install the Partners Portal on a Separate Server 15
- Kerberos Authentication 15
- Security 15

Upgrade Changes 16

Chapter 7: Version 9.6.1 17

New Features and Enhancements 17

Upgrade Changes 18

Chapter 8: Version 9.5.1 19

New Features and Enhancements 19

- Manage and Track Service Level Agreement (SLA) Compliance 19
- Access Control for Accounts and Profiles 19

Upgrade Changes. 19
Dashboard and Reports. 20
Categories for Partners, Accounts, and Profiles. 20

Chapter 9: Version 9.5.0. 21

New Features and Enhancements. 21
Dashboard and Reports. 21
Event Archiving with Data Archive. 21
Audit Trail Enhancements. 22
Authorization. 22
Forms Designer Java API. 22
Storage of Endpoint Files in Hadoop File Systems (HDFS) 22
Password Encryption Command Line Utility. 22
Upgrade Changes. 23

Chapter 10: Version 9.1.0. 24

New Features and Enhancements. 24
Dashboard and Reports. 24
Partner Promotion. 24
Web Service APIs. 24
Upgrade Changes. 25

Index. 26

Preface

The B2B Data Exchange Release Guide is written for administrators who are responsible for installing and configuring B2B Data Exchange and developers and software engineers who implement B2B Data Exchange. This guide assumes that you have knowledge of the features for which you are responsible. The B2B Data Exchange Release Guide lists new features and enhancements, behavior changes between versions, and tasks you might need to perform after you upgrade from a previous version.

Informatica Resources

Informatica Network

Informatica Network hosts Informatica Global Customer Support, the Informatica Knowledge Base, and other product resources. To access Informatica Network, visit https://network.informatica.com.

As a member, you can:

- Access all of your Informatica resources in one place.
- Search the Knowledge Base for product resources, including documentation, FAQs, and best practices.
- View product availability information.
- Review your support cases.
- Find your local Informatica User Group Network and collaborate with your peers.

Informatica Knowledge Base

Use the Informatica Knowledge Base to search Informatica Network for product resources such as documentation, how-to articles, best practices, and PAMs.

To access the Knowledge Base, visit https://kb.informatica.com. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB_Feedback@informatica.com.

Informatica Documentation

To get the latest documentation for your product, browse the Informatica Knowledge Base at https://kb.informatica.com/_layouts/ProductDocumentation/Page/ProductDocumentSearch.aspx.

If you have questions, comments, or ideas about this documentation, contact the Informatica Documentation team through email at infa_documentation@informatica.com.

Informatica Product Availability Matrixes

Product Availability Matrixes (PAMs) indicate the versions of operating systems, databases, and other types of data sources and targets that a product release supports. If you are an Informatica Network member, you can access PAMs at https://network.informatica.com/community/informatica-network/product-availability-matrices.

Informatica Velocity

Informatica Velocity is a collection of tips and best practices developed by Informatica Professional Services. Developed from the real-world experience of hundreds of data management projects, Informatica Velocity represents the collective knowledge of our consultants who have worked with organizations from around the world to plan, develop, deploy, and maintain successful data management solutions.

If you are an Informatica Network member, you can access Informatica Velocity resources at http://velocity.informatica.com.

If you have questions, comments, or ideas about Informatica Velocity, contact Informatica Professional Services at ips@informatica.com.

Informatica Marketplace

The Informatica Marketplace is a forum where you can find solutions that augment, extend, or enhance your Informatica implementations. By leveraging any of the hundreds of solutions from Informatica developers and partners, you can improve your productivity and speed up time to implementation on your projects. You can access Informatica Marketplace at https://marketplace.informatica.com.

Informatica Global Customer Support

You can contact a Global Support Center by telephone or through Online Support on Informatica Network.

To find your local Informatica Global Customer Support telephone number, visit the Informatica website at the following link:
http://www.informatica.com/us/services-and-training/support-services/global-support-centers.

If you are an Informatica Network member, you can use Online Support at http://network.informatica.com.

CHAPTER 1

Version 10.2.1

This chapter includes the following topic:

- New Features and Enhancements, 8

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 10.2.1.

Minimal Lower Layer Protocol (MLLP)

You can use Informatica Managed File Transfer to connect to MLLP servers to securely transfer files. You can create resources to send files, and services and listeners to receive files. You can use pre-configured MLLP tasks to create HL7 acknowledgements when you send or receive files. Dedicated MLLP Audit Logs allows Admin Users to view and search logs for each MLLP service. MLLP event types are logged and you can use them in tasks to initiate other actions. MLLP trigger event variables can be used in triggers to initiate related tasks.

OEM Managed File Transfer Endpoint Migration Tool

When you upgrade B2B Data Exchange and install Informatica Managed File Transfer, you can use the endpoint migration tool to migrate existing endpoint definitions from the OEM Managed File Transfer tool to Informatica Managed File Transfer.

CHAPTER 2

Version 10.2

This chapter includes the following topic:

- New Features and Enhancements, 9

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 10.2.

Informatica Managed File Transfer Integration

Informatica Managed File Transfer is an enterprise-level solution that is integrated with B2B Data Exchange for version 10.2.

Launch Managed File Transfer

You can launch Informatica Managed File Transfer from the B2B Data Exchange Operations Console.

Remote MFT Endpoints

Organizations can create remote MFT endpoints to define how to receive files from Partner-hosted servers and send files to Partner-hosted servers. The MFT endpoints use an Informatica Managed File Transfer Project to automate file transfers between remote Partner servers and the B2B Data Exchange server.

Use the B2B Data Exchange Operations Console to define remote MFT endpoints. When you create MFT endpoints, you define the partner, account, project, schedule, routing pattern, and backup details.

Hosted MFT Endpoints

Organizations can create hosted MFT endpoints to define how to send and receive files to Partners from an Organization-hosted server.

Use the B2B Data Exchange Operations Console to create and define hosted MFT endpoints.

MFT Web Users

To enable managed file transfer from the Organization-hosted server, the B2B Data Exchange Administrator creates MFT Web Users to identify those who can access the Organization-hosted server. An MFT Web User is an entity with a defined login method, user name and password, authentication type, and encryption details.

MFT Connections

To enable managed file transfer with the Partner-hosted server, the B2B Data Exchange Operator creates an MFT Connection. The MFT Connection is an entity that defines the host and port, name and password, connection details, and any proxy or SSL access details related to the Partner-hosted server.

Sample Projects

Informatica Managed File Transfer includes sample Projects that you can use out of the box, or can serve as examples when you create customized Projects.

Integrated Tracking

Informatica Managed File Transfer logging information is now integrated with the B2B Data Exchange Event Log, and Operators can view the Managed File Transfer Log as part of B2B Data Exchange Events.

CHAPTER 3

Version 10.1

This chapter includes the following topic:

- New Features and Enhancements, 11

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 10.1.

Informatica Managed File Transfer

Informatica Managed File Transfer is an enterprise-level solution included with B2B Data Exchange 10.1 that automates, streamlines, and secures document file transfer for organizations. It automates file transfers with a centralized enterprise-level system that safely and securely transfers data within and outside your enterprise.

With Informatica Managed File Transfer, you can run workflows to transfer, encrypt and process the files with B2B Data Exchange. You can schedule file transfers and monitor folders for incoming files that require immediate processing. You can securely encrypt and decrypt files, and use SFTP, SCP, FTPS, AS2, or HTTPS protocols to ensure safe file transmission.

Informatica Managed File Transfer tracks all file transfer activity and allows you to view activity in the dashboard or in PDF format to address auditing needs.

Partners use the File Transfer Portal to perform secure file transfers and file collaboration directly through their browser. The File Transfer Portal includes the Secure Folders, Shared Drive, and Secure Mail features.

Partners use Secure Folders to access authorized files and folders on the server through the browser with full audit trails.

Shared Drive enables partners to synchronize and share files with authorized users. Partners can easily share files and folders with advanced collaboration features.

Partners use Secure Mail to send messages and files as secure packages whenever needed. Recipients receive an email with a unique link to each package, and can download the message and files through a secure HTTPS connection.

With the Informatica Managed File Transfer Gateway, a Reverse and Forward Proxy server, you can protect your internal network and sensitive files so that no inbound ports are opened into your private network.

Use the Command Line Utility to perform an array of functions on a local or remote Informatica Managed File Transfer system.

Multiple Endpoints For Partner or Account

The B2B Data Exchange operator can create multiple Managed File Transfer endpoints for a partner or account.

Multiple Schedules Per Endpoint

The B2B Data Exchange operator can create and assign multiple schedules to a endpoint.

CHAPTER 4

Version 10.0

This chapter includes the following topic:

- New Features and Enhancements, 13

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 10.0.

Partners Portal File Exchange

Partners can use the Partners Portal to securely upload and download files for B2B Data Exchange. Using the portal, partners can easily exchange data files, without the need to set up file transfer software on their IT infrastructure. Partners can view a report of uploaded files and their processing status, including a link to the corresponding DX event. Partners can also download and delete files sent to them by B2B Data Exchange.

Connectivity Guide

The B2B DX Operator can upload a connectivity guide document that describes how the partner configures communication with the organization, which can then be viewed from the Partners Portal.

Select a Workflow from PowerCenter Repository

The B2B DX Operator can select a workflow directly from the PowerCenter repository, without exporting the workflow definition file and importing it to B2B Data Exchange. This reduces operator steps and configuration time, and reduces the chance of errors while exporting and importing the workflow.

CHAPTER 5

Version 9.6.2

This chapter includes the following topic:

- New Features and Enhancements, 14

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 9.6.2.

Partners Portal On-boarding

Partners can use the Partners Portal to view and configure settings for B2B Data Exchange. Partners can view and update their B2B Data Exchange message profiles, and B2B Data Exchange Operators can review Partner changes, and approve or reject them. Partners can view their endpoint communication settings, and configure their password for FTP hosted by B2B Data Exchange and Managed File Transfer.

Partners Portal User Groups

The B2B Data Exchange administrator can assign Portal users to Portal User Groups and configure relevant permissions.

Regular Expressions

You can use standard regular expressions together with file name patterns to identify the files that B2B Data Exchange processes.

Delayed Processing - Pass Original Event ID

You can select to pass the original Event ID to the PowerCenter workflow.

SLA Rules in Partners Portal

The B2B Data Exchange administrator can select which SLA rules to hide or display in the Partners Portal.

Certified for Amazon Web Services

B2B Data Exchange is certified for deployment on Amazon Web Services.

CHAPTER 6

Version 9.6.1 HF1

This chapter includes the following topics:

- New Features and Enhancements, 15
- Upgrade Changes, 16

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 9.6.1 HotFix1.

Install the Partners Portal on a Separate Server

You can install the Partners Portal on a different server than the B2B Data Exchange server.

Kerberos Authentication

Support authentication to B2B Data Exchange with Kerberos through ISP Authentication.

Security

B2B Data Exchange 9.6.1 HotFix1 introduces enhancements that tighten client and server security. Most of the enhancements are implemented on the server and have no impact on users. This section describes the enhancements that might affect system usage.

User Name and Password Environment Variables in Command Line Utilities

You can use the following options when running the Import and Export and the Archive command line utilities:

- `-U`
  Environment variable that contains the user name.
- `-P`
  Environment variable that contains an encrypted password.

Restrict Remote B2B Data Exchange Server Shutdown and Startup

Administrators can define a list of clients from which users can remotely shut down and start up the B2B Data Exchange server.

Protect Calls from PowerCenter Workflows to the B2B Data Exchange Server with a Secret Token

A secret token authorizes calls from PowerCenter workflows to the B2B Data Exchange server through B2B Data Exchange transformations. Administrators can define a custom token to replace the default system token.

Secure Communications with PowerCenter Services

Support secure communications with PowerCenter services in Secure Sockets Layer (SSL) mode.

Upgrade Changes

This section lists functionality and behavior changes in B2B Data Exchange 9.6.1 HotFix 1.

Repository Utility

The following changes were made to the syntax of the repository utility:

- The parameter `-l` is optional.
- Added the option `--configFile`. This option points to the location of the B2B Data Exchange configuration property file. If no value not specified, B2B Data Exchange loads the file from the following location:

  ```
  <DXInstallationDir>/conf/dx-configuration.properties
  ```

- The option `--file` is no longer applicable to the `upgradeSchema` and `enablePartitioning` commands.

Secure Direct Event and Document Management

DXFlowServer API replaces TSSARuntime API for direct management of events and documents. DXFlowServer API supports authentication and authorization.

This change does not impact existing PowerCenter workflows that make use of either B2B Data Exchange transformations or Java Transformations that use the DXClient-API.

If you use Java Transformations that access the TSSARuntime API directly, not through the DXClient-API, you must update the Java Transformations to access the DXFlowServer API instead of the TSSARuntime API, and define the shared secret between server and client.

CHAPTER 7

Version 9.6.1

This chapter includes the following topics:

- New Features and Enhancements, 17
- Upgrade Changes, 18

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 9.6.1.

Partners Portal

Partners can use the on-premise Partners Portal to securely track and monitor their B2B Data Exchange processes with the organization. The Partners Portal is a secure portal located on the DMZ of the organization that is controlled, private, and protected. The portal displays visual reports about data that B2B Data Exchange processes for partners and can be branded for the partner.

Partners use the Partners Portal dashboard and monitoring events list to track and monitor their own B2B Data Exchange messages and troubleshoot errors by examining events.

Partners Portal Dashboard

The Partners Portal contains a graphical Dashboard with a set of pre-configured charts and reports. Partners can use the Dashboard to monitor business activity at a glance, and can drill down to specific events.

The Dashboard displays a real time view of the status of Data Exchange messages, event trends over time, the file processing success rate, and the top three SLA rule violations if relevant. Partners can also view the events related to any chart in the Dashboard.

Partners Portal Events List

With the Portal Monitoring Event List, partners can view events as they occur and track data exchange between the partner and the organization. Partners use the Monitoring Event List to view the status of message processing and related events. Each event summarizes a specific transaction activity and message status.

Partners can view, filter, sort, and search the events in the Monitoring Event List. You select an event in the Monitoring Event List to view details and attached files. For example, a partner can easily identify errors in a file sent in the last day by filtering the Monitoring Events by Event Type and Status.

For more information, see the B2B Data Exchange *Partners Portal Guide Version 9.6.1*.

Operational Data Store on SQL Tables

This version supports SQL Server database for the Operational Data Store.

VLNavigator

The VLNavigator is automatically installed with Managed File Transfer when you install B2B Data Exchange.

Upgrade Changes

This section lists functionality and behavior changes in B2B Data Exchange 9.6.1.

Name Changes to Fields in the DX_ENDPOINT Table

The following DX_ENDPOINT table field names were changed in the B2B Data Exchange metadata repository:

- The `JMS_USER_NAME` field was renamed `USER_NAME`
- `JMS_PASSWORD` field was renamed `PASSWORD`

CHAPTER 8

Version 9.5.1

This chapter includes the following topics:

- New Features and Enhancements, 19
- Upgrade Changes, 19

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 9.5.1.

Manage and Track Service Level Agreement (SLA) Compliance

You can manage and track compliance with service level agreements SLA rules. An SLA rule is a set of criteria that defines the requirements for service level agreements. If B2B Data Exchange detects a deviation from the requirements, it reports a violation of the SLA rule.

B2B Data Exchange uses key performance indicators (KPIs) in SLA rules to provide measurable information about events, such as average processing time or number of events. The SLA violation detector searches and reports violations according to the SLA rules that you defined.

You can use SLA tracking and management if you installed the Dashboard and Reports component when you install B2B Data Exchange.

Access Control for Accounts and Profiles

You can restrict access to accounts and profiles with categories. Categories are classifications that can represent regional division or departments in the organization.

By default, accounts inherit categories from the partner and profiles inherit categories from the account. You can choose to manage individual account or profile categories. Objects without categories are accessible by all B2B Data Exchange users.

You manage partner categories in the same way as previous versions.

Upgrade Changes

This section lists functionality and behavior changes in B2B Data Exchange 9.5.1.

Dashboard and Reports

When you upgrade the Dashboard and Reports component, you need to import the operational data store event loader workflow to PowerCenter. During the import process, select the **Retain Persistent Mapping Variable Values** option in the **Conflict Resolution Wizard** to import the workflow parameters from version 9.5.0.

The upgrade process overrides the values of the following operational data store event loader workflow parameters:

- $$WF_Wait_Before_Next_Load_Minutes
- $$WF_Number_Of_Retry_Attempts

If you modified the parameters in B2B Data Exchange 9.5.0, you must modify the parameter values after you upgrade.

Categories for Partners, Accounts, and Profiles

When you upgrade to version 9.5.1, consider the following category management changes:

- The upgrade process overrides previously assigned categories for profiles and accounts. After you upgrade, accounts inherit categories from the partner and profiles inherit categories from the account.
- After you upgrade, partners without categories become accessible by all B2B Data Exchange users. In earlier versions, partners without categories are accessible only by users with permissions for all categories.

CHAPTER 9

Version 9.5.0

This chapter includes the following topics:

- New Features and Enhancements, 21
- Upgrade Changes, 23

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 9.5.0.

Dashboard and Reports

The extended Dashboard displays personalized visual reports about information that B2B Data Exchange processes. Use the Dashboard to view summary information about B2B Data Exchange event processing, such as the number of events for a specific partner or the accounts with the highest error rate.

Most of the reports in the Dashboard are based on key performance indicators (KPIs) that B2B Data Exchange retrieves from the operational data store. You create the operational data store when you install the B2B Data Exchange Dashboard and Reports component. The operational data store collects aggregated event information from the run-time B2B Data Exchange repository with the operational data store event loader. The event loader is a PowerCenter workflow that loads events from the run-time B2B Data Exchange repository at predefined intervals.

In addition to the default KPIs, you can instruct the event loader to load event attribute values. The B2B Data Exchange developer can use Logi Info Studio to create custom Dashboard panels based on the default KPIs or the event attribute values.

If you upgrade from version 9.1.0 and install the Dashboard and Reports component, the B2B Data Exchange installer replaces the previous basic Dashboard.

Event Archiving with Data Archive

You can use the B2B Data Exchange accelerator for Data Archive to archive events from the main B2B Data Exchange repository.

With the B2B Data Exchange accelerator, you can use Data Archive to create archive projects with advanced parameters, such as event status or event type. You can also schedule standalone or recurring archive jobs, and browse or search for archived events and documents.

If you use B2B Data Exchange 9.5.0 with Data Archive 5.3.6, you can archive events and documents to the history database for short-term archiving and view the archived events from the **Archived Events** page of the Operation Console.

You can still use the archive command line utility to perform basic event and document archiving.

Audit Trail Enhancements

You can use the enhanced audit trail to track actions that operators perform on objects in the Operation Console, APIs, or the command line utilities, such as creating or editing a partner or an account. Each audit record contains detailed information about the action and the object, such as the name of the user that performed the action and the actual values that were changed.

B2B Data Exchange no longer stores audit records as events. If you upgrade from earlier versions, you can still view and archive legacy audit trail events.

Authorization

You can use authorization to comply with the organization business or legal need to monitor and regulate actions that operators perform in the Operation Console on partners, accounts, and profiles, before B2B Data Exchange completes the action.

You define authorization levels for different actions or objects. For example, you can require approval by 2 operators every time an operator deletes a partner. Operators with authorization privileges review and approve or reject the pending operator actions. B2B Data Exchange completes the action and generates an audit record after approval. The object is locked for editing while an operator action is pending.

Forms Designer Java API

You can populate lists in the Forms Designer with values from external sources. Use the classes, interfaces, and methods in the API to determine the source of the values and set default values for the list.

You can configure the API to throw an exception in case an error occurs while the Forms Designer retrieves the values. When you use the Forms Designer, you see an indication for any list with values from an external source.

Storage of Endpoint Files in Hadoop File Systems (HDFS)

You can store backup copies of files that B2B Data Exchange processes through Managed File Transfer or File Receive endpoints in HDFS.

You configure the HDFS location and credentials in B2B Data Exchange system properties. When you define the endpoint, you can use the HDFS root directory to determine the location in which to save the file. For Managed File Transfer endpoints, you can store incoming files in HDFS.

You can use B2B Data Exchange with several Hadoop versions. Select the Hadoop version based on the organization needs.

Password Encryption Command Line Utility

When you install B2B Data Exchange, configuration properties and system property values that contain passwords are stored as encrypted strings.

If you modify any of the passwords, you use the password encryption command line utility to encrypt the password and use the encrypted string.

Upgrade Changes

When you upgrade to B2B Data Exchange 9.5.0, consider the following functionality and behavior changes:

- Java Development Kit (JDK) is not installed on IBM AIX operating systems. Install and configure JDK before you install B2B Data Exchange.
- Java Cryptography Extension (JCE) is not installed on IBM AIX operating systems. If you use B2B Data Exchange with Managed File Transfer, install JCE before you install B2B Data Exchange.
- The archive command line utility does not use the dx.event.status.category.success system property and the dx.event.status.category.failed system property to determine if an event reached a final or an error status. Instead, B2B Data Exchange stores the information in the event status. The archive command line utility determines which events to archive based on whether the event reached a final state, regardless of the error state.
- Names and identifiers of custom attributes for partners and accounts are case-insensitive. During the upgrade process, the B2B Data Exchange installer removes all duplicate names or identifiers and the log describes the removal information. The installer does not remove attribute definitions. If you import partners or accounts from earlier versions that contain duplicates, the import process rejects all duplicates and throws an exception.
- B2B Data Exchange does not create events for audit records, and does not convert audit trail events from previous versions to enhanced audit records. You can use the archive utility to archive and delete all of the legacy audit trail events before you upgrade. If you keep the legacy audit events from earlier versions, you can view the events after you upgrade in the Legacy Audit Events page. You can also archive the legacy audit events with the B2B Data Exchange Accelerator for Informatica Data Archive or the B2B Data Exchange archive utility after you upgrade.
- When an event reconciliation completes successfully, B2B Data Exchange generates a single entry in the **Processing Information** tab of the event details instead of multiple entries for each stage of the reconciliation process.
- To improve performance and reduce bottlenecks, B2B Data Exchange creates a temporary file for every incoming file that it processes through Managed File Transfer endpoints in the following folder: `<DXDocumentStore>\mft`. Each file name includes the prefix `dx_`, the name of the incoming file, and the extension `.tmp`. To conserve disk space, periodically delete temporary files that B2B Data Exchange created in the folder at least 24 hours earlier.
- You cannot configure session replication for B2B Data Exchange in a cluster environment.
- B2B Data Exchange uses the dx.endpoint.jms.provider.url system property to determine if the B2B Data Exchange JMS Broker service is running.
- After you upgrade, you cannot view the **Properties** tab of the DX_Generate_Temporary_File transformation. To use this option, delete and re-add the transformation.
- In the B2B Data Exchange repository on Microsoft SQL Server, the type of the CORRELATION_IDENTIFIER column in the DX_CORRELATION table is NVARCHAR(255) instead of VARCHAR(255).
- In the B2B Data Exchange repository on Oracle and Microsoft SQL Server, the type of the CORRELATION_ID column in the DX_CORRELATION table is NUMERIC(19,0) instead of VARCHAR(255).

CHAPTER 10

Version 9.1.0

This chapter includes the following topics:

- New Features and Enhancements, 24
- Upgrade Changes, 25

New Features and Enhancements

This section lists the new features and enhancements in B2B Data Exchange 9.1.0.

Dashboard and Reports

- B2B Data Exchange provides a dashboard with a set of charts and reports for monitoring key performance indicators.
- The dashboard provides the following charts:
  - Error Rate
  - Error Rate by Partner
  - Error Rate by Event Type
  - Events Distribution
  - Events Processing Time

When you log in to the Operation Console, the Dashboard appears.

Partner Promotion

You can use the B2B Data Exchange Operation Console to promote partners from one environment to another.

Web Service APIs

- Use the Trading Partner Management API to manage partners, profiles, and accounts.
- Use the Web Service Endpoint API to send input documents to a B2B Data Exchange endpoint and route them to the relevant processing profile.

Upgrade Changes

When you upgrade to B2B Data Exchange 9.1.0, consider the following functionality and behavior changes:

- By default, the **Event List** screen displays events created in the last hour. For more information about configuring the event list time frame, see the *B2B Data Exchange Operator Guide*.
- The import/export utility validates input files by verifying that all mandatory custom attributes are present and assigned a value.

  Note: The validation might fail when you import files that were created under earlier versions of B2B Data Exchange.
- To install Data Transformation, use the Informatica platform installer.
- HTTPS is the default connection setting for new B2B Data Exchange installations. HTTP remains the default connection setting for upgrade installations.

INDEX

9.1.0
  dashboard and reports 24
  partner promotion 24
  upgrade changes 25
  Web service APIs 24
9.5.0
  audit trail 22
  authorization 22
  dashboard and reports 21
  event archiving 21
  forms designer Java API 22
  password encryption 22
  storage in HDFS 22
  upgrade changes 23
9.5.1
  categories 19
  SLA 19
  upgrade changes 20
9.6.1 HotFix 1
  Kerberos authentication 15
9.6.1 HotFix 1 *(continued)*
  partners portal 15
  security 15
  upgrade changes 16

N

New features and enhancements
  9.1.0 24
  9.5.0 21, 22
  9.5.1 19

U

Upgrade changes
  9.1.0 25
  9.5.0 23
  9.5.1 19, 20