

OPENTEXT™



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Contents

All Users	xv
Introduction	1
About This Guide	1
Audience	1
System Requirements	2
Operating System	2
Browser Requirements	2
PC Requirements	2
Conventions Used in This Guide	2
Trading Grid Online Support	2
Online Help	2
Contact Us	3
1 Getting Started	5
Access Trading Grid Online	5
Navigate Trading Grid Online	6
Navigation Panel	6
User Profiles	7
Configure Trading Grid Online	9
2 Operations Center	11
Overview	11
Message Center	12
Message Dashboard	12
Alerts Section	12
Main Area	12
Configure the Operations Center	13
Copy Components	13
Other Page Options	16
User Options	17
Intelligent Web Form (IWF) Users	17
Active Documents Users	17
Active Invoices with Compliance (AIC) Users	17
Trading Grid Messaging Service (TGMS) Users	17
Trading Grid Resellers	18
Company Administrators	18
Community Administrators	18
3 Transaction Manager	19
Overview	19
File Inbox	19
View or Download a Transaction File	20
Upload and Send a File	22

4	File Transfer Service	25
	Browser Requirements	25
	File Transfer Service Tab	26
	Search for Files	26
	Upload Files	28
	Download Files	30
	Delete Files	30
	Export FTS File Metadata	31
	View File History	32
	View a Partner's FTS	33
5	Active Documents	35
	Active Documents Dashboard	36
	Dashboard Features	36
	View Transactions from the Dashboard	37
	Change The Reporting Period	37
	Export Data from the Dashboard	37
	Activity Summary	38
	Exception Summary	39
	Document Volume by Type Reports	40
	Document Volume by Partner Reports	40
	Search for Transactions	41
	Search for Transactions by Search Level	44
	Active Invoices for Compliance (AIC) Additional Search Features	48
	View Search Results	52
	Download Search Results	53
	Download Documents and Files from Search Results	54
	Change Column Settings	59
	Results with More than 7000 Records	59
	Save Search Criteria	60
	Transaction Process Lifecycle Information	60
	View Process Lifecycle Information	61
	Download Process Lifecycle Information	66
	View File and Document Heirarchies	69
	Error Information	70
	Status Alerts	71
	Functional Acknowledgement Information	72
	Managed Service Platform Data	72
	TGMS Data	73
	Communication Sections	73
	Extended Event Data	73
	Translation Information	74
	Related Documents	75
	Audit Notes	75
	Business Document Viewer	76
	Reports	80
	Schedule a Report	80
	View Scheduled Reports	81
	Change/Generate/Delete a Report Schedule	81

Delivered Reports	82
Download Reports	83
View Audit Logs	83
Delivered Reports Retention Period	83
Delete Delivered Reports	83
6 Reports for Trading Grid Messaging Service	85
Tips for Viewing Reports	86
TGMS Reports	86
Transaction Summary Report	87
About Status Reports and Billable Reports	88
Inbound Status Report	89
Outbound Status Report	90
Interconnect Status Report	91
Delivered and Scheduled Reports	92
Trading Partnership Transaction Report	92
Inbound Reactivate Report	92
About Transaction Alert Logs	93
Mailbox Arrival Report	94
Mailbox Error Report	94
Mailbox Inactivity Report	95
Functional Acknowledgement Delinquency Report	95
Interchange Exceptions Report	95
TGMS Report Columns	96
Configure TGMS Report Data	97
Functional Acknowledgement Management (FAM)	98
All Tracked Trading Partners Report	98
Compliant Trading Partners	100
Late Trading Partners Report	100
No Acknowledgement Trading Partners Report	101
Excluded from Tracking Report	102
Filter Report Data	102
View Data by Trading Partner or Document Type	104
Functional Acknowledgement Scorecard (FAS)	106
Change Scorecard Parameters	107
7 Active Invoices with Compliance	109
Overview	109
AIC Search Tools	109
Supported Document Types	110
AIC Rules and Requirements	111
Search for Invoices Using Active Documents	112
Basic Active Documents Searches	112
Advanced Active Documents Searches	116
View Processing Lifecycle Information	130
Email Alerts	133
Search for Invoices Using Active Invoices	135
Active Invoices Archive	135

Cancel an Invoice	143
Attach Files to An Invoice	145
Redeliver Invoices	148
Send Multiple Invoices in a Batch	151
Upload Unrelated and Non-sequential Invoices	153
Format Non-Invoice XML Files	155
Invoice Information Page	164
Legal Entity Partner List	170
Tax Exemption Justification Documents	172
8 Trading Grid Analytics	175
Overview	175
Reporting Period	176
Analytics Dashboard	176
Analytics Dashboard Top Panel	177
Analytics Dashboard Bar Graphs	180
Metrics Tab	183
Operational Metrics Detail	183
Business Metrics Detail	184
Filter Performance Metrics	189
Export Performance Metric Data	199
Dashboard Settings	201
Trading Partner Currency Settings	201
Default Item Qualifier Settings	203
9 Document Manager	207
Overview	207
Document Manager Features	207
Hardware Requirements	208
Forms Viewer	208
Document Manager Inboxes and Sendboxes	211
Document Inbox	211
File Inbox	213
Document Sendbox	214
File Sendbox	217
Inbox and Sendbox Navigation Tips	218
Configure Inboxes and Sendboxes	221
View Documents and Attachments	222
Create New Documents	224
Create Turn Around Documents	225
Navigation Tips	228
Create a New Template	229
Create a New Document from a Template	231
Optional Steps	234
Upload Documents to Document Manager	234
Create and Send Ship Notices with Labels	236
Create a Ship Notice	236
Pack a Shipment	239

Unpack a Package	243
Delete a Package.	243
View/Edit Package Contents	244
View Hierarchy/Delete Multiple Packages	244
Pack Packages into Larger Units	245
Add Mandatory Field Values	248
Assign Serial Numbers	252
Print Shipping Labels and Reports	252
Save Your Packing Information and Send the Ship Notice	254
Send Documents and Files	254
Attach a File to a Document	254
Modify and Resend Documents	256
Send, Modify, and Resend Files	257

System Administrators259

10 Community Manager 260

Create company accounts	261
Required Information.	261
Company Profile	262
Assign a Subscription Package	263
Add Customer User Accounts	263
Add New User Accounts	264
Activate, Deactivate, or Delete User Accounts	266
Set Up Trading Relationships	266
Current Trading Partner List	266
Standard Trading Partnership	267
Open Trade Partnership	270
AutoForward Partnership	271
AutoCopy Partnership	273
Mailboxes and EDI Addresses	275
Configure EDI Mailboxes	275
Add or Delete Mailbox Addresses	276
Define the Customer's Service Contacts	278
Define Service Contacts	279
Re-Assign a Default Contact	280
Remove a Default Contact	280
View, Change, or Delete a Contact	281
Define Customer Alerts and Options	282
Alerts and Options Overview	283
Define the Alerts	283
Mail Slots	288
Password Policy	289
Enhanced Rules	289
Rules and Alerts Descriptions	290
Define the Enhanced Rules	290
Resolve Customer Issues	297
Log in as a Customer	297

Invitation Tool	297
Create a Company Invitation	298
Copy a Company Invitation	300
Create a User Invitation	301
Modify a Company or User Invitation Details	302
On-Boarding and Self-Registration	303
Create Invitation for “Spoke” or “Child” Companies	303
Self-Registration Steps for Suppliers	305
Self-Registration Steps for Buyers	306
Pending Registrations	308

11 Account Manager 310

Overview	310
Navigation Panel	311
Company Profile Information	311
Manage User Accounts	313
Create Company User Accounts	313
Invite Company Users	318
User Action History	322
Trading Relationships	323
For Intelligent Web Forms (IWF) Users only	324
For IWF Users only	324
About your Trading Community	324
Current Trading Partner List	325
Standard Trading Partnership	326
Open Trade Partnership	330
AutoForward Partnership	333
AutoCopy Partnership	336
Company Subscription	339
Mailboxes and EDI Addresses	339
Configure EDI Mailboxes	339
Add or Delete Mailbox Addresses	341
Service Contacts	345
Define Service Contacts	345
Re-Assign a Default Contact	347
Remove a Default Contact	347
View, Change, or Delete a Contact	348
Messaging Service Alerts and Options	349
Define the Alerts	349
FAM Alerts and Report Options	358
Active Document Status Alerts	360
Define an alert	360
Active Document Data Policies	362
Customize Key Names/Labels	363
Active Invoice Legal Profiles	364
Define a Legal Profile	364
Secure Email Delivery	373
Maintain Legal Entity Relationships	375
Machine Users	377

Add a Machine User	377
Update or View a Machine User	378
Activate or Deactivate a Machine User	378
Mailboxes and Mailslots	378
Cross-Reference Tables	380
File Format Guidelines	380
Update Cross-Reference Table Values	381
Add or Delete Rows in Cross-Reference Tables	381
Download Cross Reference Table as .csv Files	382
Upload Cross Reference Tables	382
Revert Cross Reference Table To Previous Versions	383
Billing	383
Configure Invoiced Bill Columns	383
Find an Invoiced Bill	384
View Invoiced Bill Data	384
Print Invoiced Bills	384
View or Download Invoiced Bills	384
Policy	385
Change Password Policy	385
Terms and Conditions	385
Active Order Alert Management	388
Define Alerts	389
Define Business Rules	393
Define Display Templates	397
Order Display Template	397
Ship Notice Display Template	397
Invoice Display Template	399
Remittance Advice Display Template	400
DSD Invoice Display Template	400
Credit Note Display Template	401
Debit Note Display Template	402
Add Logos to Documents	402
Upload Terms and Instructions	403
Upload Order Closure and Retention Policy	403
Define Inventory Criteria	404
Time Period	404
Location Hierarchy	404
Manage Department Codes	405
Change Invoice Status Names	405
Manage Email Alerts	406
Modify Your Email Alert Settings	407
Field Descriptions and Terms	408
Enable the Active Documents Dashboard	430
Use the Active Documents Dashboard	431
Search for Transactions	435
Configure the Search Page	436
Begin Searching	436
Search on Keys	438
Search for Related Documents	439
Group Search Results	439

Search Results	440
Configure the Search Results Page	440
View the Results	441
View Related Documents	441
Drill Down into Data	442
Print and Save Results	442
Save all Search Criteria	442
Transaction Process Lifecycle — Classic	443
Enable the “Classic Lifecycle” Option	443
View a Process Lifecycle	443
Error Information	444
Update Error and Event Statuses	444
Status Alerts	446
FA Information	447
Managed Service Platform Data	447
TGMS Data	448
Communication Sections	448
Extended Event Data	448
Translation Information	448
Applicable Related Documents	450
Audits and Notes	450
Print a Processing Lifecycle Page	451
Transaction Process Lifecycle — New	451
Enable the “New Lifecycle” Option	452
View a Process Lifecycle	452
Error Information	454
Status Alerts	455
FA Information	456
Managed Service Platform Data	456
TGMS Data	456
Communication Sections	457
Extended Event Data	457
Translation Information	457
Applicable Related Documents	457
Audits and Notes	458
Scheduled Reports	458
Standard Reports	458
Create a TGMS Report or 1-Time only Report	459
Save/Schedule/Send Reports	460
View Scheduled Reports	462
Change/Generate/Delete a Report Schedule	462
Delivered Reports	462
Download Reports	463
View Audit Logs	463
Retention Period	463
Delete Delivered Reports	463
Glossary	464
Error Numbers -1 and -2	470
-1 EOF	470
-2 Character Set read_set Error	470

Error Numbers 128 – 193.	471
128 Code Space Exceeded	471
129 Stack Exceeded.	471
130 Stack Underflow	471
131 Illegal Instruction	471
132 Message Queue Illegal I	471
133 Source Access Syntax Error	471
134 Source Model Syntax Error.	472
135 Target Access Syntax Error	472
136 Target Model Syntax Error	472
137 ATTACH Error	473
138 Data Model Item Not Found.	473
139 Data Model Item – No Value Found	473
140 No Instance	473
141 Mandatory Segment/Record Missing	474
142 Try Next Error.	474
143 Sort on Non-sort Item	474
144 Wrong Argument Type	474
145 Parse Environment Error	474
146 Invalid Date, Time, or Numeric String	474
146 Invalid Date, Time, or Numeric String	475
147 RETURN Executed.	475
148 RELEASE Executed	475
149 REJECT Executed	475
150 CONTINUE Executed	475
151 BREAK Executed	475
152 Lookup Error	475
153 Memory Allocation Error.	475
154 Virtual Memory Allocation Error	476
155 Virtual Memory Allocation Size Error	476
156 Fatal Virtual Memory Error	476
157 Access Memory Allocation Error	476
158 Data Tree Memory Allocation Error	476
159 Number of Allowable Translations Exceeded	476
160 Error Opening Infile.	477
161 Error Opening Outfile	477
162 Error Opening Swapfile	477
163 EXEC Error	478
164 sort_STK malloc Error	478
165 Message System Call Error.	478
166 Error Log Open Error.	478
167 Function Not Found.	478
168 Data Model Memory Allocation Error	478
169 Invalid Function Used in Target Access Model	478
170 Command Line (-at) ATTACH Error	479
171 No Children Found	479
172 Access Item is a Null Pointer	479
173 Improper Access Model Item Definition	479
174 Virtual Memory Free List Error	480

175 Virtual Memory Out of Space Error	480
176 Data Field/Element Too Short	480
177 Data Field/Element Too Long	480
178 Error in Administration Database Open	480
179 Unable to Get Lock	480
180 Unable to Unlock.	480
181 Read Error in Administration Database	480
182 Write Error in Administration Database	481
183 I/O Error in Administration Database Access	481
184 Wrong Permissions or Invalid Output Character	481
185 Truncation Error – Data Model Object	481
186 Invalid Argument Value	481
187 Exceeded Maximum Data Models	481
188 Exceeded Maximum Access Models	482
189 STOP Executed	482
190 Mandatory Data Field – Element Missing	482
191 Invalid Character in the Data Field/Element	482
192 Missing Post Delimiter	482
193 Access Model Pre-Condition Not Met	482
Error Numbers 200 – 255.	483
200 Unable to Recover.	483
201 Recovery on Minimum	483
202 Recovery on Maximum	483
203 No Value Available for Item	483
205 Recovery on CHARSET.	483
206 Recovery on POST_COND	483
208 Recovery on LKUP.	483
211 Invalid Structure	484
212 XSL Missing Schema	484
213 XML Referring Invalid DTD/Schema	484
214 XML Invalid Against Schema	484
215 XML Stylesheet Error	484
216 XML Stylesheet Error	484
217 XML Proxy Server Error	484
218 Source Constraint Stylesheet Parse Error	485
219 Target Constraint Stylesheet Parse Error	485
220 Source Constraint Stylesheet Validation Error.	485
221 Target Constraint Stylesheet Validation Error.	485
222 Output XML Validation Error.	485
237 Internal c-tree Error	485
238 Maximum CPU Time Exceeded	486
239 Maximum Output File Size Exceeded.	486
248 Value Stack Memory Error	486
249 Error in idcopy In Access Parser	486
250 Translation Memory Error	486
251 Error Allocating vstack	487
252 Unable to Open Archive File (in ARCHIVE_REC())	487
254 Error Allocating Buffer Space for Device	487
255 Error Parsing Command Line Map Component File	487

All Users



This section contains instructions for OpenText customers using Trading Grid Online products. The information is organized by the various components that comprise Trading Grid Online.

- ["Introduction"](#)
- [Chapter 1, "Getting Started"](#)
- [Chapter 2, "Operations Center"](#)
- [Chapter 3, "Transaction Manager"](#)
- [Chapter 4, "File Transfer Service"](#)
- [Chapter 5, "Active Documents"](#)
- [Chapter 6, "Document Manager"](#)
- [Chapter 7, "Reports for Trading Grid Messaging Service"](#)
- [Chapter 8, "Active Invoices with Compliance"](#)
- [Chapter 9, "Trading Grid Analytics"](#)

Note: You might not have access to all of the components described in this guide. The products and features available are based on your trading community and subscription permissions.

Introduction

Trading Grid Online is a single, global, and multi-lingual portal that provides easy access to OpenText products and services.

You can send and receive documents directly from Trading Grid Online, and view reports showing your sent and received document activity.

Trading Grid Online also interfaces with the OpenText Trading Grid Messaging Service (TGMS), which enables the electronic exchange of inbound and outbound business documents in a secure, fast, and reliable manner. As a TGMS customer, you can use Trading Grid Online to administer your mailbox, including such activities as adding and maintaining EDI addresses, trading partnerships, and other users within your account. Trading Grid Online administers, monitors, manages, and reports TGMS transactions by:

- Trading information electronically with your global partners efficiently.
- Reporting the status of both sent and received documents.

Note: For more information about TGMS, refer to the OpenText *TGMS User Guide*.

About This Guide

This guide explains how to navigate Trading Grid Online and use the various components, depending on your role and subscription privileges.

Audience

This guide is intended for the following audience:

- Company Administrators
- Company Users

System Requirements

Operating System

OpenText Trading Grid Online supports the following operating systems:

- Microsoft Windows
- Mac OS X

Browser Requirements

Trading Grid Online supports the following browsers:

- Internet Explorer v11
- Mozilla Firefox v46
- Google Chrome, as needed

Browsers must be enabled for JavaScript, and popup blockers must be disabled.

PC Requirements

- Personal Computer (500MHz)
- 256MB RAM
- Recommended screen display setting: 1024 x 768

Conventions Used in This Guide

This guide uses the following conventions:

Convention	Description	Example
Bold text	Buttons, fields, menu options, and hyperlinks in Trading Grid Online.	Click Save .
"Blue text in quotes"	Links to other sections in the guide.	" Navigate Trading Grid Online " on page 6.
Italic text	References other relevant publications.	See the <i>TGMS User Guide</i> .

Trading Grid Online Support


Online Help

To access the online help for a Trading Grid Online page, click  in the title bar.



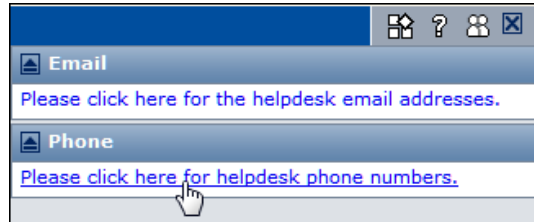
Contact Us

If you cannot find an answer to your questions in online help, contact the OpenText Client Services Help Desk by phone or email.

- 1 Click  in the title bar from any page in Trading Grid Online.



The Customer Support links display.



- 2 Click the appropriate link to locate the email address or phone number for the Client Services Help Desk near your location.

Getting Started

1

This chapter provides an overview of Trading Grid Online, including navigation tips and how to set up your user profile.

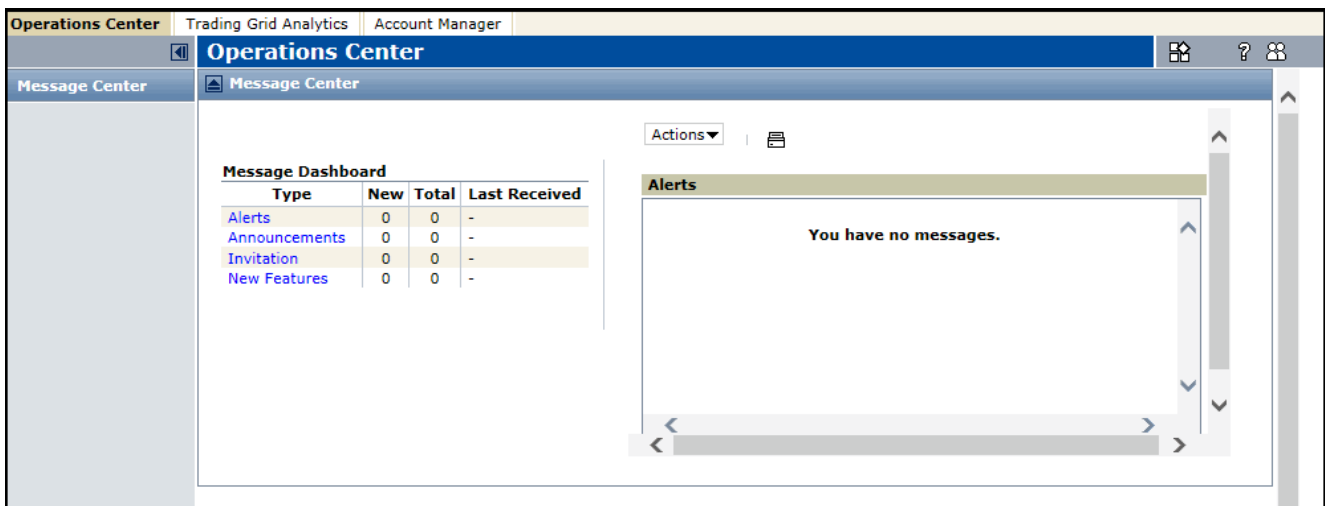
Topics include:

- “Access Trading Grid Online” on page 5
- “Navigate Trading Grid Online” on page 6
- “User Profiles” on page 7
- “Configure Trading Grid Online” on page 9

Access Trading Grid Online

To access Trading Grid Online

- 1 Go to the following URL from your Internet browser:
<https://tradinggrid.gxs.com/>
- 2 Log in to Trading Grid Online with your user name and password.
The Operations Center page opens.




The Operations Center is the home page for Trading Grid Online. This page displays Alerts, Announcements, Invitations, and other notifications. For more about using the Operations Center, see “Operations Center” on page 11.


Navigate Trading Grid Online

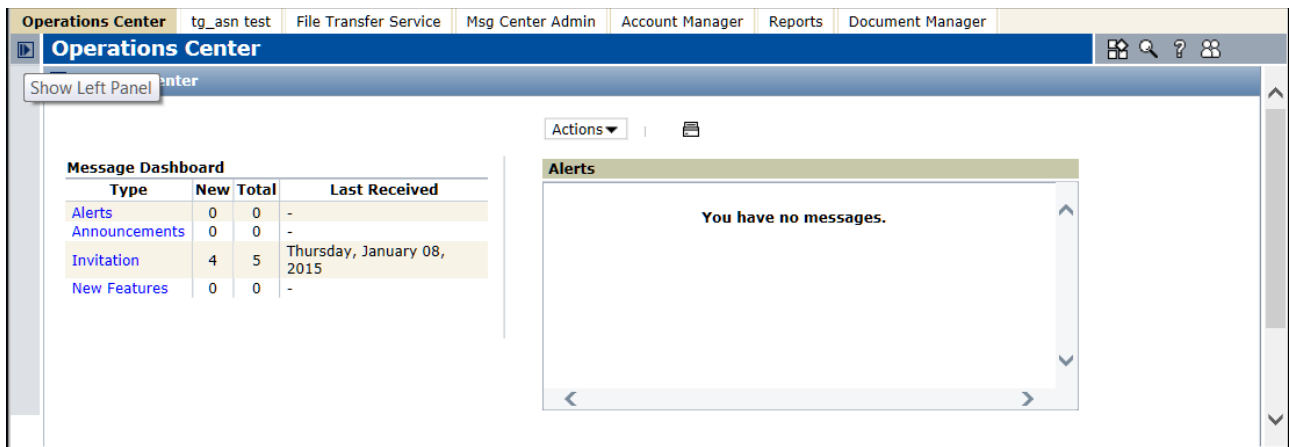
Navigation Panel

All Trading Grid Online pages have a similar layout. The Navigation Panel on the left side of every page is a collapsible panel that provides access to the components that your company subscribes to. The component buttons indicate the functions that you can perform from a page. You can show or hide the Navigation Panel and configure the way the components functions display.

To show or hide the Navigation Panel

Click  to collapse the panel.

Click  to show the panel.



Trading Grid Online Tabs

The Trading Grid Online tabs display the components that your company is subscribes to.

Note: The Trading Grid Online tabs in your application also depend on your role and user access privileges.

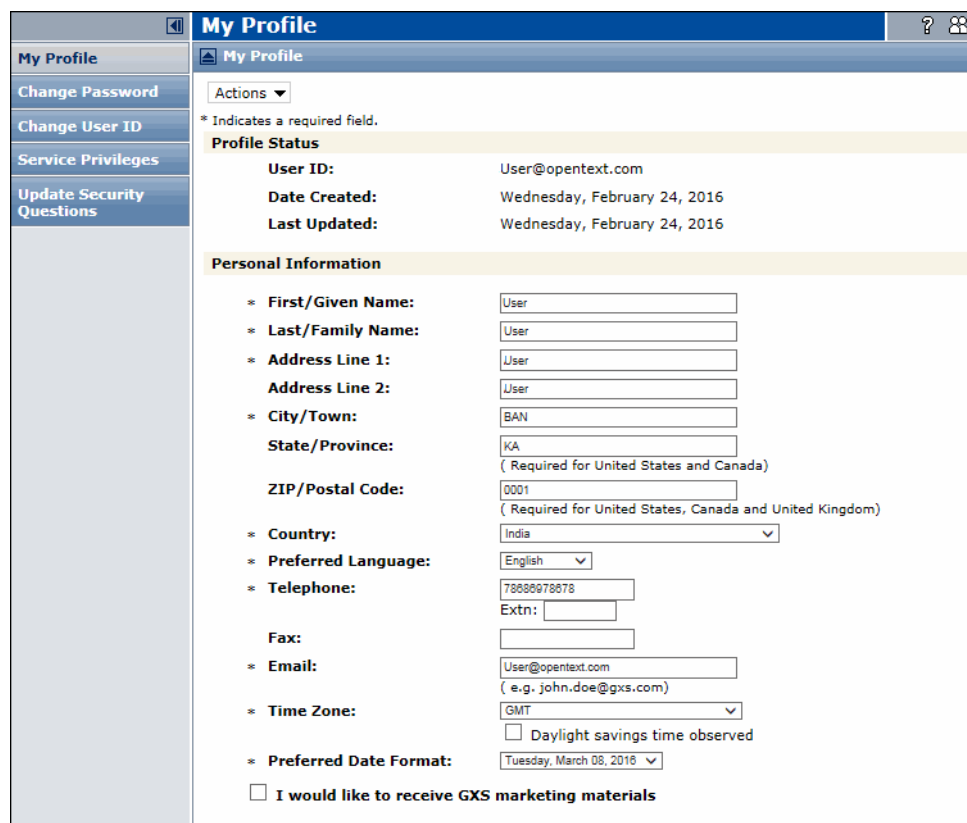
User Profiles

Your user profile contains your contact information, user ID, and password that you defined during registration. It also lists your service privileges. You can update the information at any time.

To update profile information

1 Click **My Profile**.

The My Profile page opens.



The screenshot shows the 'My Profile' page. On the left is a navigation menu with options: My Profile, Change Password, Change User ID, Service Privileges, and Update Security Questions. The main content area is titled 'My Profile' and includes an 'Actions' dropdown menu. Below this is a note: '* Indicates a required field.' The page is divided into two sections: 'Profile Status' and 'Personal Information'. The 'Profile Status' section shows: User ID: User@opentext.com, Date Created: Wednesday, February 24, 2016, and Last Updated: Wednesday, February 24, 2016. The 'Personal Information' section contains various fields with asterisks indicating they are required: First/Given Name (User), Last/Family Name (User), Address Line 1 (User), Address Line 2 (User), City/Town (BAN), State/Province (KA), ZIP/Postal Code (0001), Country (India), Preferred Language (English), Telephone (78888078878), Fax, Email (User@opentext.com), Time Zone (GMT), and Preferred Date Format (Tuesday, March 08, 2016). There is also a checkbox for 'I would like to receive GXS marketing materials'.

2 Update your information in the **Personal Information** section, as needed.

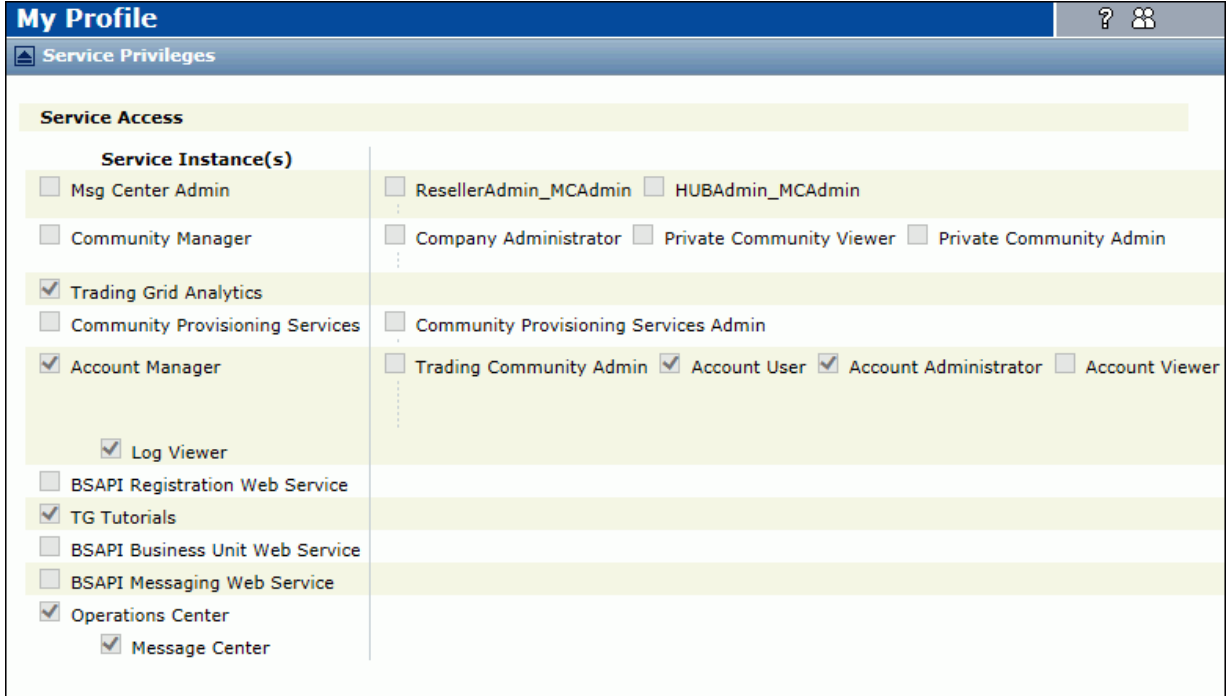
3 Click **Submit** from the **Actions** drop-down menu.

To view Service Privileges

1 Select **Service Privileges** from the My Profile page.

The Service Privileges page indicates the your service access with check marks next to the approved services.

Example: Service Access Priviledges (not a complete list of services).



Note: Only your Company Administrator can add or change your access priviledges in Trading Grid Online.

To change your password

- 1 Click **Change Password** from the My Profile page.
- 2 Type the updated password information.
- 3 When finished, click **Actions > Submit**.

Note: The Community Manager or Company Administrator might have defined password policies, such as an expiration period or content restrictions, that apply to all users at your company or in your community.

To change your User ID

- 1 Click **Change User ID**.
- 2 Type the updated User ID information.
- 3 When finished, click **Actions > Submit**.


To update security question information

- 1 Click **Update Security Questions**.
- 2 For questions 1 through 5, use the drop-down menu to select a desired security question, and type the appropriate answer.
- 3 When finished, click **Submit**.

Configure Trading Grid Online

You can change the layout and the contents displayed on configurable Trading Grid pages.

To configure Trading Grid Online pages

- 1 Click  in the title bar.

Note: If the configure icon does not display in the title bar, the page is not configurable.



Operations Center

2

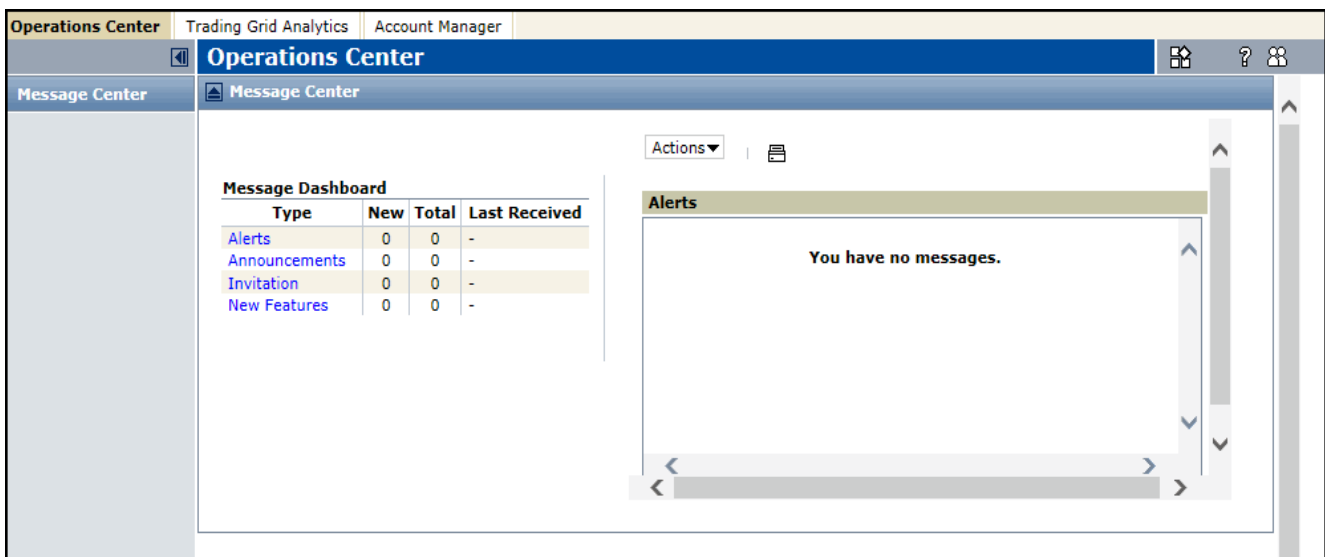
This chapter describes the Trading Grid Online Operations Center.

Topics include:

- [“Overview” on page 11](#)
- [“Message Center” on page 12](#)
- [“Configure the Operations Center” on page 13](#)
- [“User Options” on page 17](#)

Overview

The Operations Center opens automatically when you log in to the system. This page is the home page for Trading Grid Online and it is available to all users.



Note: The features available from the Operations Center are based on your role and subscription permissions.

Message Center

The Message Center displays system messages and alerts.

Message Dashboard

The **Message Dashboard** shows new, unopened messages and the date that the newest message was received.

Message Types

There are four types of messages in the dashboard:

Message Type	Description
Alerts	Notifications about important information that might require attention. The system keeps Alert messages until the number of days specified in the message.
Announcements	Notifications about Trading Grid Online issues or events. The system keeps Announcement messages until the number of days specified by your Company Administrator.
New Features	Notifications about new or upcoming Trading Grid Online features. The system keeps Announcement messages until the number of days specified by your Company Administrator.
Invitations	Invitations provide invitation statistics.

Alerts Section

The messages display in the **Alerts** section (on the right side of the page).

Manage Messages

To	Do this
View a message.	<ol style="list-style-type: none"> 1 Click the type of message you want to view. 2 Select a message. The message opens in the Alerts section.
Save a message.	<ol style="list-style-type: none"> 1 Select a message. 2 Click Actions > Save. The message is saved until you delete it manually.
Delete a message.	<ol style="list-style-type: none"> 1 Select a message. 2 Click Actions > Delete. The message is deleted.

Main Area


The content area contains text and data based upon the selected link or tab. The information displayed is configurable.

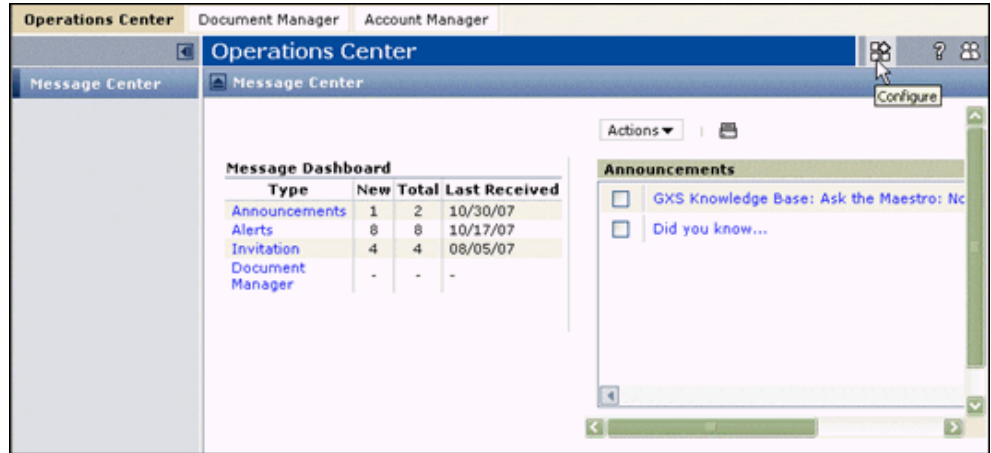
Configure the Operations Center

You can configure the Operations Center by copying up to five other components to the page, and set up the page layout and content display to access the easily.

Copy Components

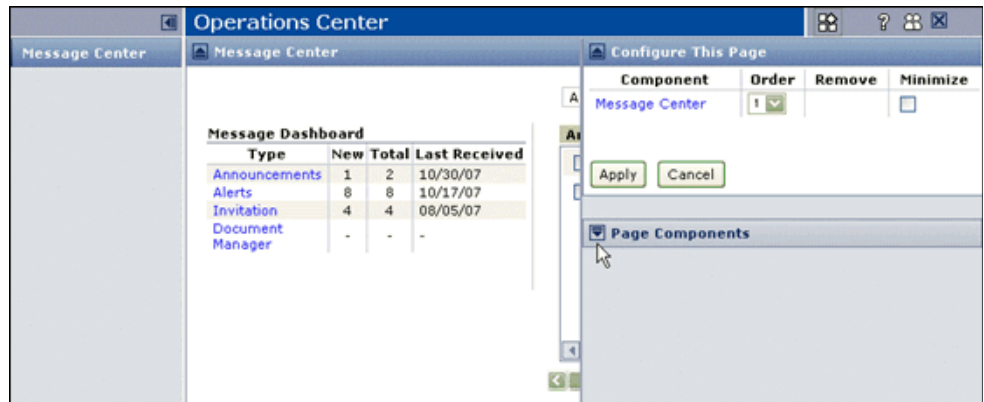
To copy components to the Operations Center

- 1 Click  in the title bar.

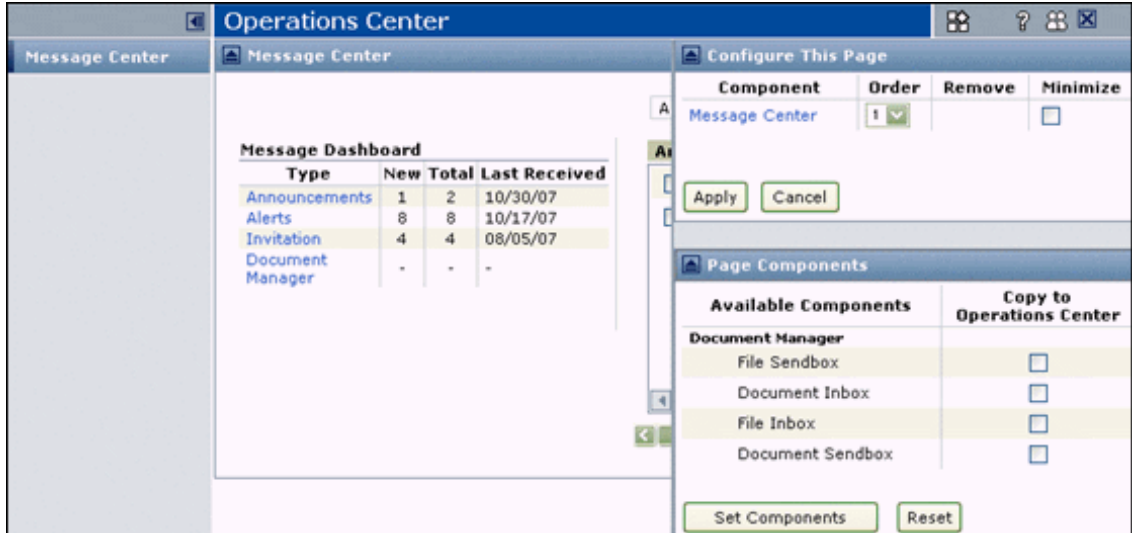


The **Configure this Page** window opens.

- 2 Click the Page Components arrow.



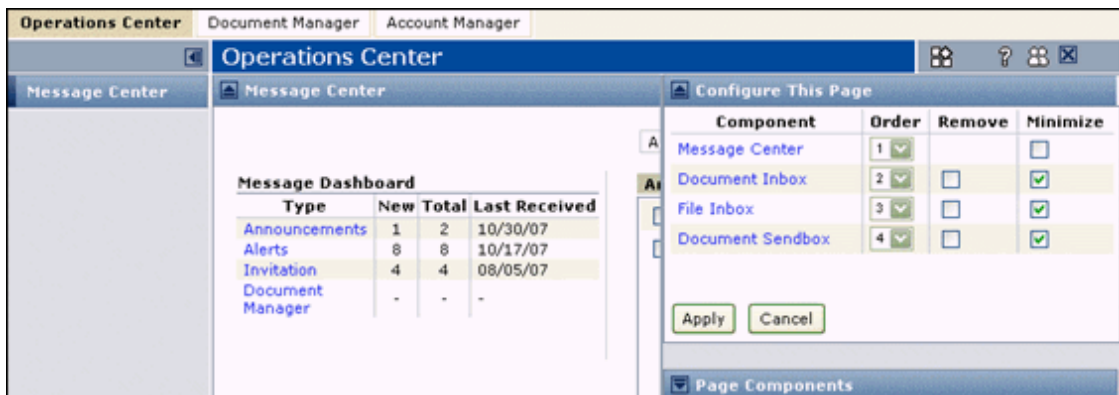
The **Page Components** section lists your available components.



3 Check the appropriate checkboxes in the **Copy to Operations Center** section for the components you want to copy.

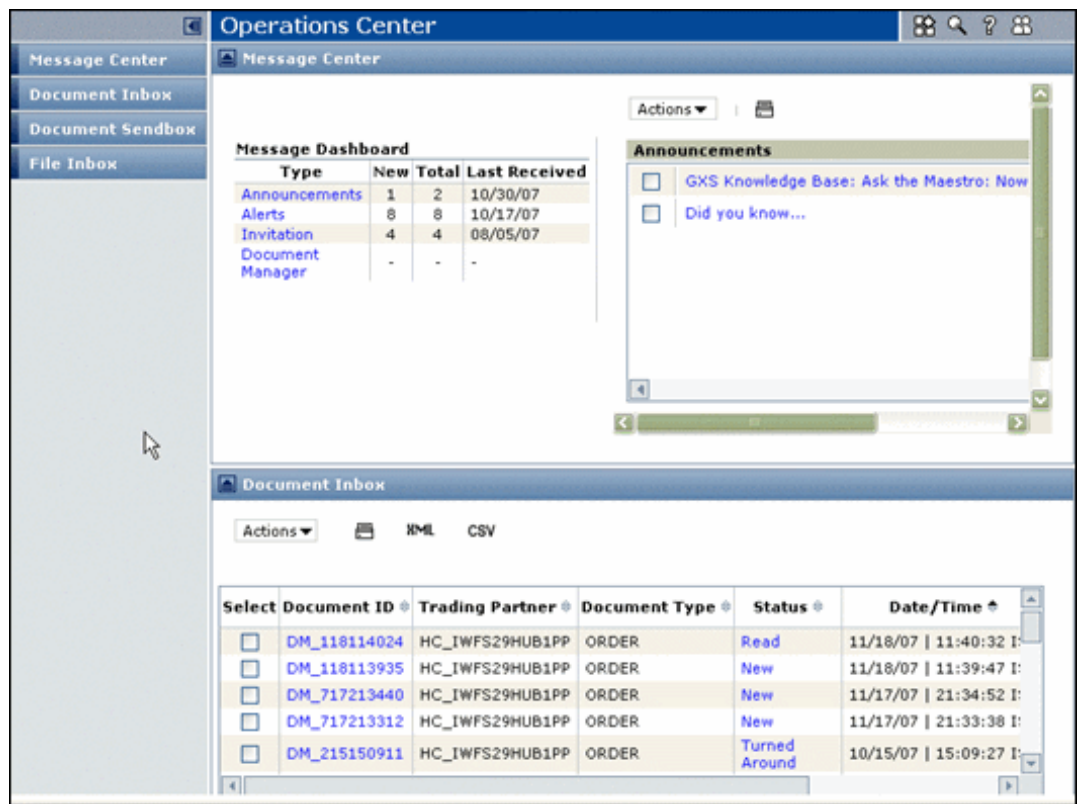
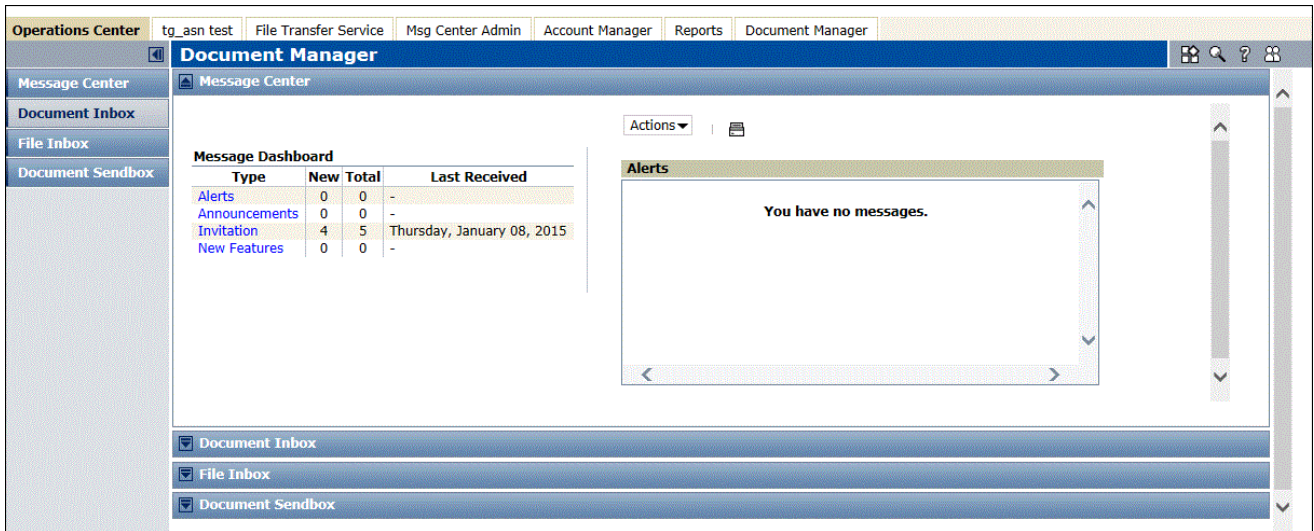
4 Click **Set Components**.

The **Component** column list the copied components.






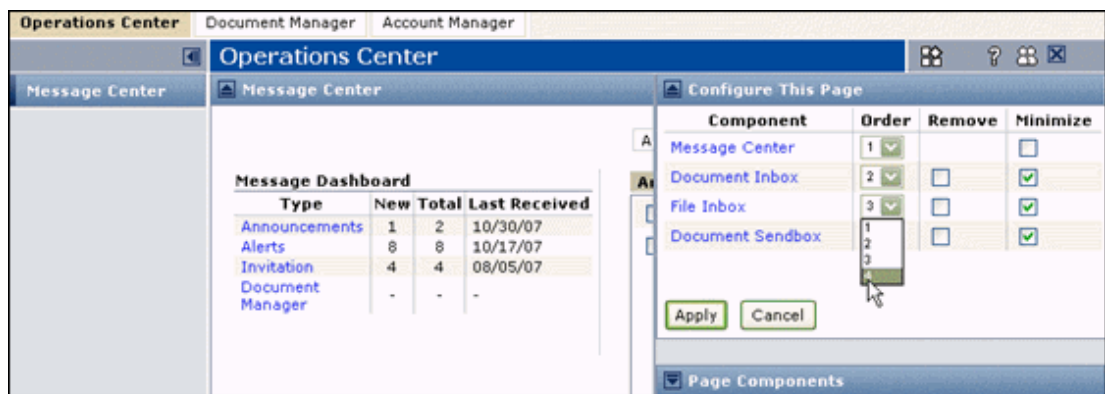
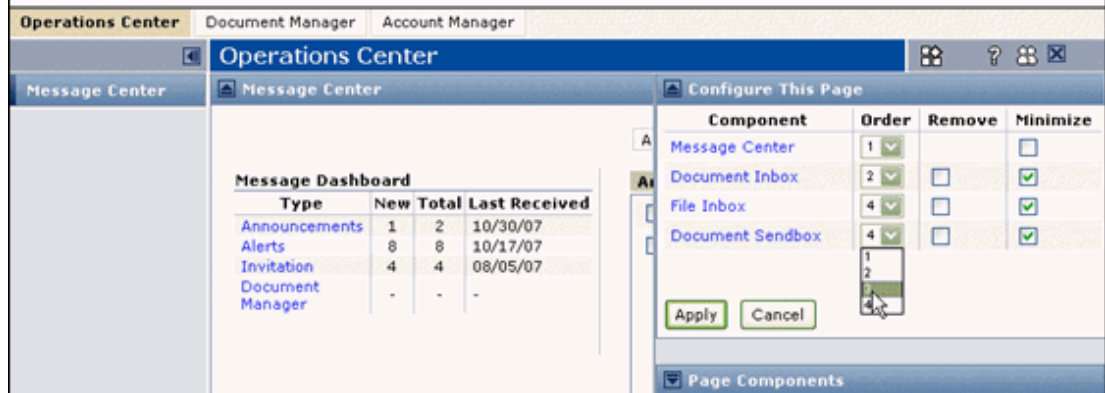
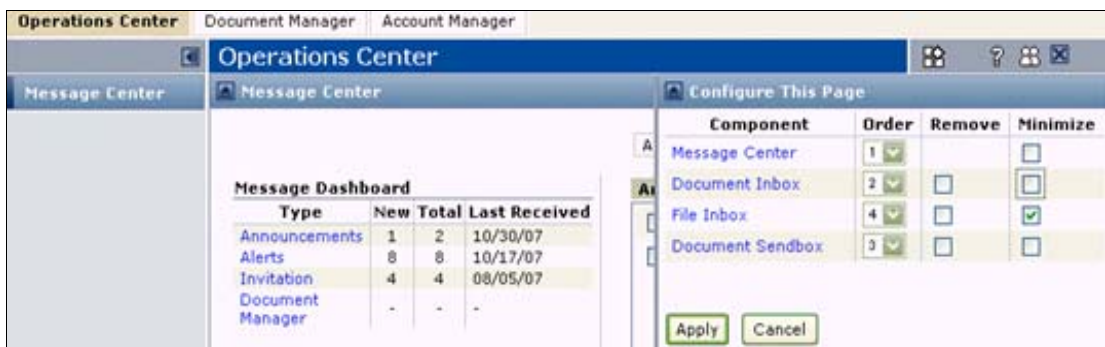
5 Click **Apply**.

You can now access the copied components from the Navigation Panel.



Other Page Options

To	Do this
Show or hide columns	Click  to hide the column. Click  to show the column.
Print information from a section	Click  .
Hide component data	Click the Minimize icon > Apply .
Display component data	Click the Maximize icon > Apply .
Remove a component	Check the component checkbox, and click Remove > Apply .
Change the sequence of components on a page	In the Order column, number the components in the desired order. Click Apply .

User Options

- "Intelligent Web Form (IWF) Users" on page 17
- "Active Documents Users" on page 17
- "Active Invoices with Compliance (AIC) Users" on page 17
- "Trading Grid Messaging Service (TGMS) Users" on page 17
- "Trading Grid Resellers" on page 18
- "Company Administrators" on page 18
- "Community Administrators" on page 18

Intelligent Web Form (IWF) Users

Use the Operations Center to perform the following tasks:

- View, save, and delete documents
- Access files and documents from your Inbox or Sendbox

To access documents from the Operations Center

- 1 In the **Type** column of the **Message Dashboard**, click the **Document Manager** link.

A summary of your documents opens.

To access files and documents from your Inbox or Sendbox

Do one of the following:

- Click the applicable number in the **Total** column of the **Message Dashboard**.
- Click the **Document Manager** tab to open Document Manager.

Active Documents Users

If your company subscribes to the current version of Active Documents, click the **Active Documents** tab.

Otherwise, click the **Reports** Tab for the older version of Active Documents. See [Appendix B, "Active Documents Classic"](#).

Active Invoices with Compliance (AIC) Users

To work with your invoices, click the **Reports** tab.

Trading Grid Messaging Service (TGMS) Users

To upload or send a file from the Transaction Manager, click the **Transaction Manager** tab.

To see all Trading Grid Online subscription reports, click the **Reports** tab.

Trading Grid Resellers

To set up a new company, or to view and modify information for an existing company's Trading Partners, users, alerts and configurations, and more, click the **Community Manager** tab.

Note: This tab is available only to Community Administrators and Resellers.

Company Administrators

To view and modify information about your Trading Grid account, your Trading Partners, your company users, your company alerts and configurations, and more, click the **Account Manager** tab.

Note: This tab is available only to Community Administrators.

Community Administrators

To view and modify information for a Trading Grid company, Trading Partner, company user, company alerts and configurations, and more for your community, click the **Community Manager** tab.

Note: This tab is available only to Community Administrators and Resellers.

Transaction Manager

3

This chapter describes how to send and receive documents from your mailbox using the Transaction Manager.

Topics include:

- "Overview" on page 19
- "File Inbox" on page 19
- "View or Download a Transaction File" on page 20
- "Upload and Send a File" on page 22

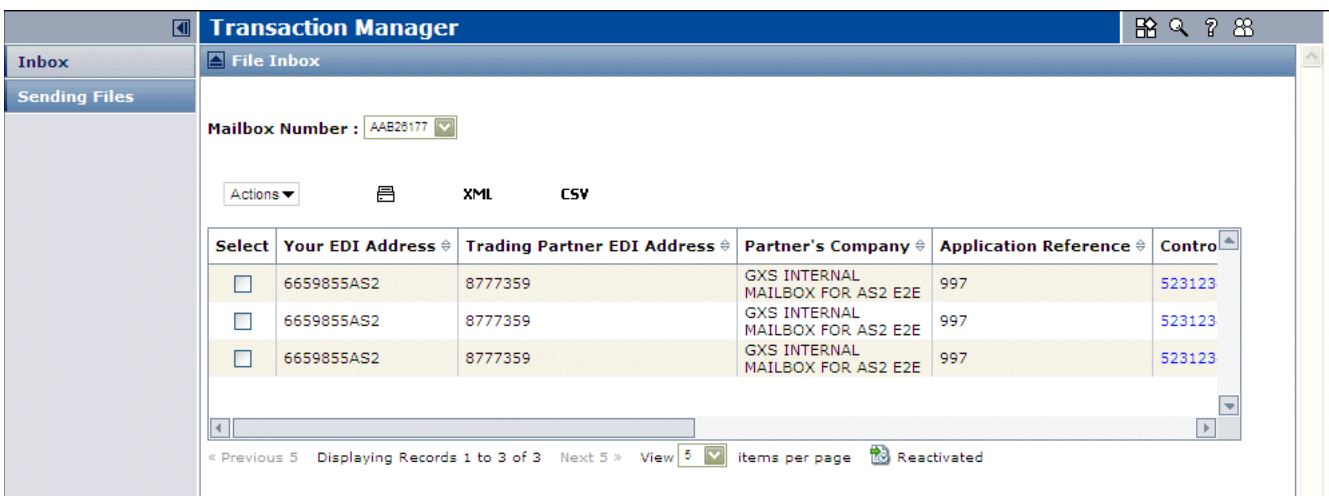
Overview

From the Transaction Manager, you can view and download documents from your Trading Grid Messaging Service mailbox. You can also send both EDI and non-EDI documents to your trading partners.

The Transaction Manager displays the transactions waiting in your mailbox from Trading Partners and allows you to copy them to your desktop. This feature eliminates the need to use a separate communications software package or protocol, as well as unsuccessful retrievals due to software or protocol session version conflicts.

File Inbox

The **File Inbox** lists trading partner transactions in your mailbox. You can retrieve, download, and view these transactions.



The screenshot shows the Transaction Manager File Inbox interface. The mailbox number is AAB26177. There are three transactions listed in the table below.

Select	Your EDI Address	Trading Partner EDI Address	Partner's Company	Application Reference	Control
<input type="checkbox"/>	6659855AS2	8777359	GXS INTERNAL MAILBOX FOR AS2 E2E	997	523123
<input type="checkbox"/>	6659855AS2	8777359	GXS INTERNAL MAILBOX FOR AS2 E2E	997	523123
<input type="checkbox"/>	6659855AS2	8777359	GXS INTERNAL MAILBOX FOR AS2 E2E	997	523123

Navigation: < Previous 5 Displaying Records 1 to 3 of 3 Next 5 > View 5 items per page Reactivated

The **File Inbox** provides the following information for each transaction:

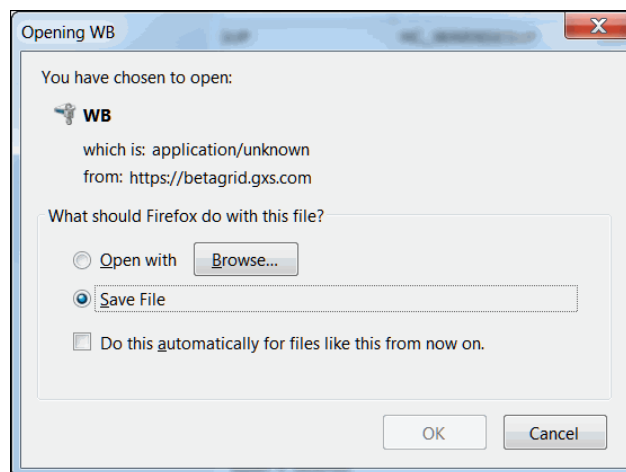
Field	Description
Your EDI Address	The EDI address where the transaction was sent.
Trading Partner EDI Address	The EDI address of the trading partner that sent the transaction.
Partner's Company	The name of the trading partner's company.
Application Reference	Refers to the type of data in the file. For example, 850.
Control Number	The Interchange Control Number of inbound and outbound data.
ILOG	The Input Log Number (ILOG), assigned by Trading Grid Online to uniquely identify a file transmitted by the Sender for tracking purposes. An ILOG is an 11-digit number, based on the combination of the month, day, Greenwich Mean Time, and the decimal fraction of the hour.
Data Type	The application reference document type.
Mailbox Process Date/Time	The date and time when the transaction was available for pickup from the mailbox.
GXS Receipt Date/Time	The date and time when GXS received the transaction.
Days Before System Deletion	The number of days before Trading Grid Online deletes the transaction, as specified by a user or company. Note: Deleted files cannot be accessed or retrieved.
Reactivate Flag (Icon)	Indicates that the receiver has reactivated the file.

View or Download a Transaction File

To view or download a transaction file

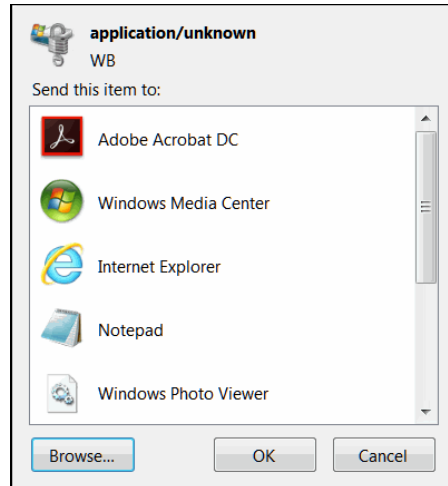
- 1 Click the **Transaction Manager** tab.
- 2 Click the **Control Number** of the applicable transaction.

The **File Download** dialog box opens.



3 Do one of the following:

- Select **Save File**. Follow the prompts to download the transaction file to your desktop.
- Select **Open with**, and click **Browse** to open the application.

**Important:**

- For large transaction file sizes (and depending on connection speed), the download might take some time.
- If you cancel the File Download dialog in this step, Trading Grid Online still considers the transaction "received" from your mailbox. That transaction is no longer in your **File Inbox**.
- After you receive a transaction, it is viewable as an "opened" transaction in your **Inbound Status** report under the **Reports** tab. From the report, select the transaction and click the **Inbound Reactivate** command to send the transaction back to your **File Inbox** again. For more information, see "[Document Manager](#)."

Upload and Send a File

To upload and send a file to a Trading Partner

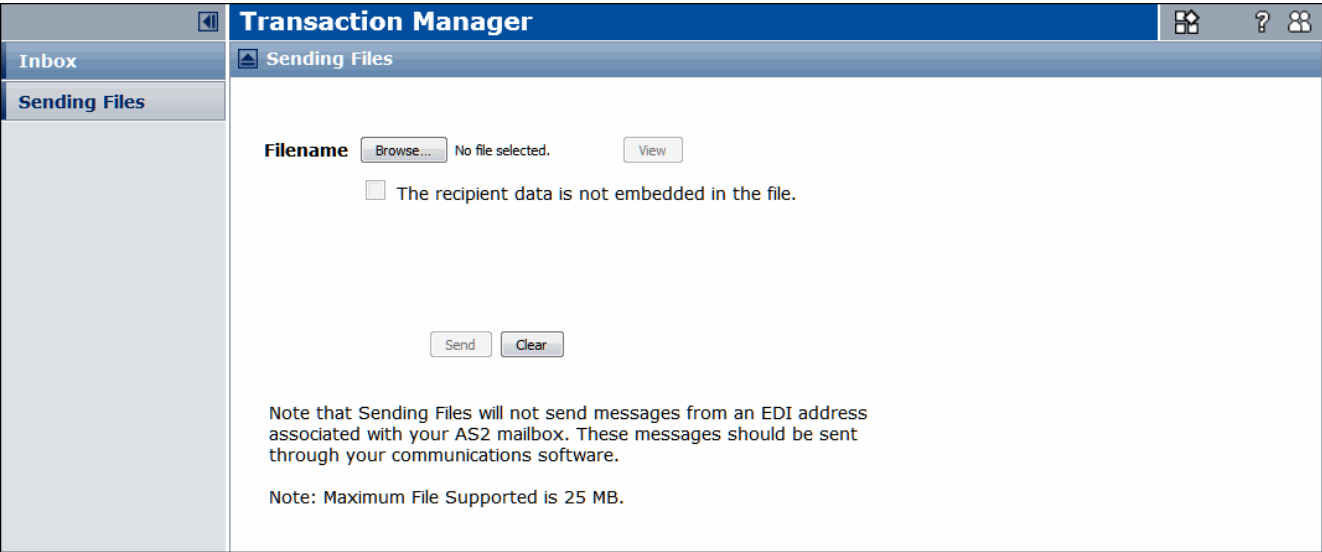
- 1 Create the file on your desktop computer; for example:

```

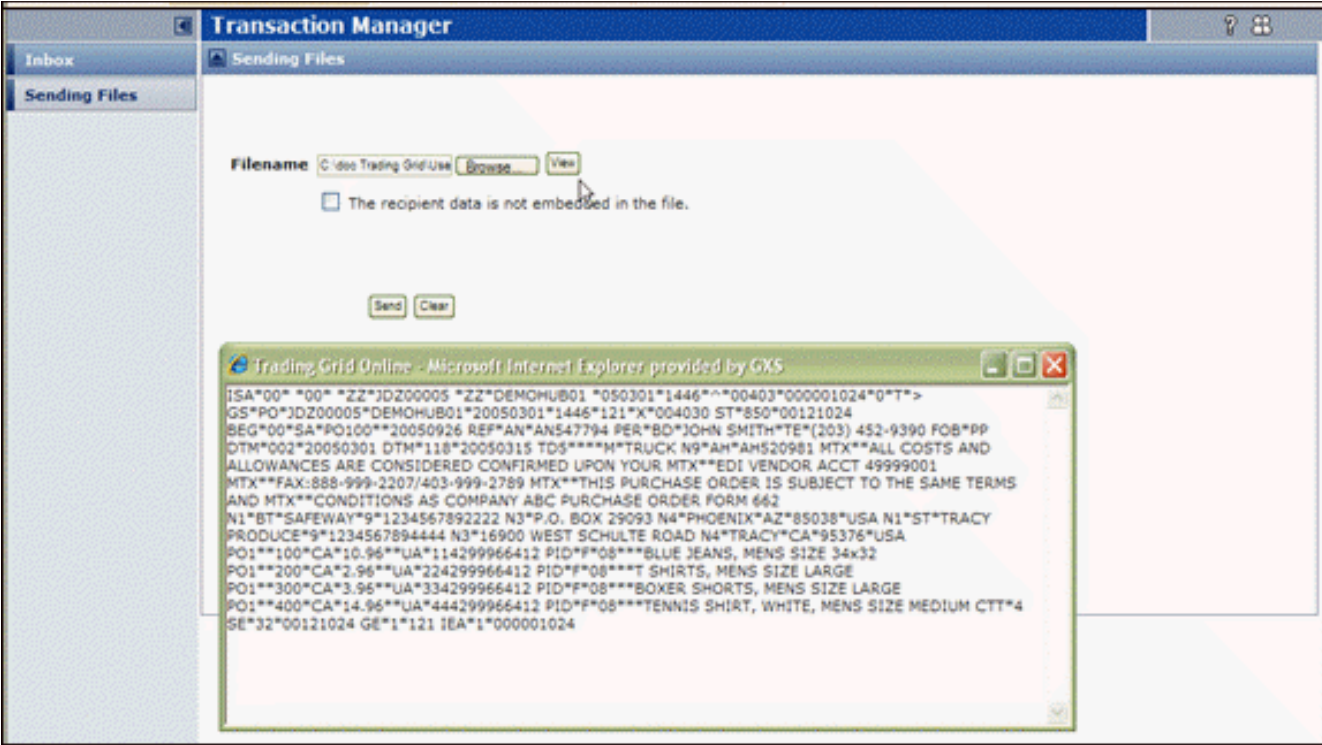
ISA*00*                *00*                *ZZ*JDZ00005          *ZZ*DEMOHUB01
*050301*1446*^*00403*000001024*0*T*>
GS*PO*JDZ00005*DEMOHUB01*20050301*1446*121*X*004030
ST*850*00121024
BEG*00*SA*P0100**20050926
REF*AN*AN547794
PER*BD*JOHN SMITH*TE*(203) 452-9390
FOB*PP
DTM*002*20050301
DTM*118*20050315
TD5***M*TRUCK
N9*AH*AH520981
MTX**ALL COSTS AND ALLOWANCES ARE CONSIDERED CONFIRMED UPON YOUR
MTX**EDI VENDOR ACCT 49999001
MTX**FAX: 888-999-2207/403-999-2789
MTX**THIS PURCHASE ORDER IS SUBJECT TO THE SAME TERMS AND
MTX**CONDITIONS AS COMPANY ABC PURCHASE ORDER FORM 662
N1*BT*SAFEWAY*9*1234567892222
N3*P.O. BOX 29093
N4*PHOENIX*AZ*85038*USA
N1*ST*TRACY PRODUCE*9*1234567894444
N3*16900 WEST SCHULTE ROAD
N4*TRACY*CA*95376*USA
P01**100*CA*10.96**UA*114299966412
PID*F*08***BLUE JEANS, MENS SIZE 34x32
P01**200*CA*2.96**UA*224299966412
PID*F*08***T SHIRTS, MENS SIZE LARGE
P01**300*CA*3.96**UA*334299966412
PID*F*08***BOXER SHORTS, MENS SIZE LARGE
P01**400*CA*14.96**UA*444299966412
PID*F*08***TENNIS SHIRT, WHITE, MENS SIZE MEDIUM
CTT*4
SE*32*00121024
GE*1*121
IEA*1*000001024
  
```

- 2 Click the **Transaction Manager** tab.
The File Inbox page opens.
- 3 Click **Sending Files** from the Navigation Panel.

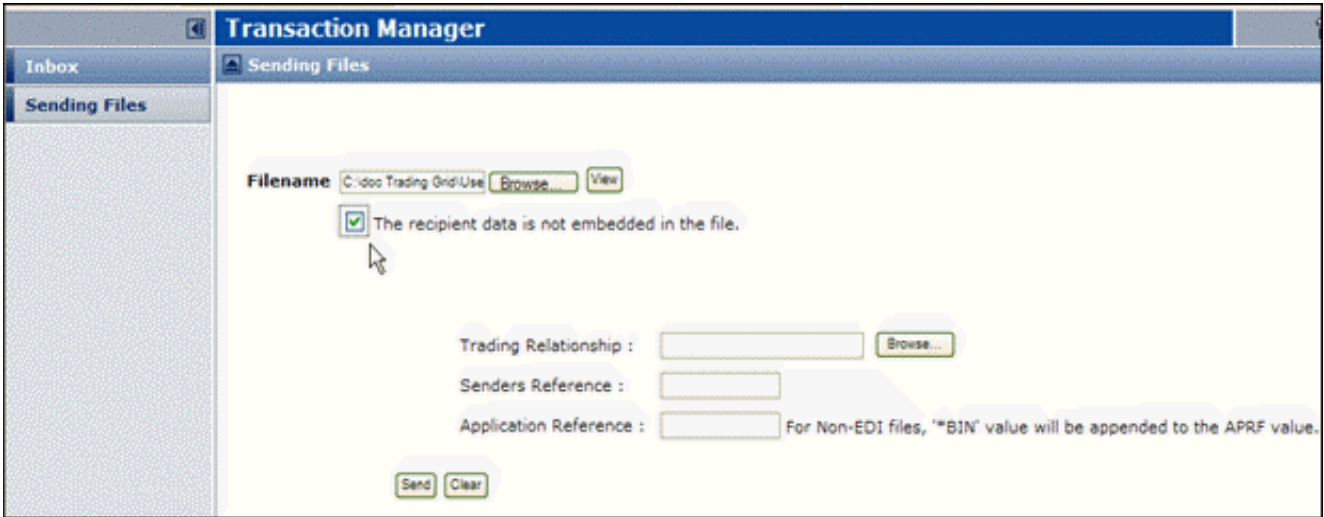
The Sending Files page opens.



- 4 Type the filename path, or click **Browse** to locate the file you want to send.
Note: Contact OpenText Support if you do not know, or cannot find, the applicable filename.
- 5 To verify that the selected file is correct, click **View** (optional).



- 6 Do one of the following:
- If the file contains the partner's address information, click send to send the file.
 - If the file does not contain the partner's address information, continue to step 7.
- 7 Check the **Recipient data is embedded in the file** check box.
 The page refreshes and displays additional fields.



- 8 Provide the appropriate information in the new fields. All fields are required.

Column Name	Description
Trading Relationship	The name of the trading partner that you want to receive the file.
Sender's Reference	The sender's Transmission Reference number. This number identifies either the file or the interchange control number.
Application Reference	Indicates the type of data contained in the file, for example, 850. Note: Trading Grid Online automatically appends *BIN to the Application Reference for non-EDI documents. To disable the Application Reference: <ol style="list-style-type: none"> 1 Click the Configure icon in the title bar. 2 Check the Append *BIN to Application Reference for Non-EDI documents checkbox. 3 Click Apply.

- 9 When finished, click **Send**.

File Transfer Service (FTS) is an application hosted by OpenText, which is used by companies and their trading partners to share EDI and non-EDI files over the Internet.

This chapter explains how to manage and share files using FTS.

Topics include:

- ["Browser Requirements" on page 25](#)
- ["Search for Files" on page 26](#)
- ["Upload Files" on page 28](#)
- ["Download Files" on page 30](#)
- ["Delete Files" on page 30](#)
- ["Export FTS File Metadata" on page 31](#)
- ["View File History" on page 32](#)
- ["View a Partner's FTS" on page 33](#)

Browser Requirements

FTS runs on the following Internet browsers.

- Internet Explorer, Versions 10 and 11
- Firefox, Version 29 (and greater)

File Transfer Service Tab

This section explains how to search for files in Retrieve Files (files your partner sent to you for download in FTS) and Send Files (files your company uploaded to FTS for download by your trading partner) in FTS.

The screenshot shows the 'File Transfer Service' interface. It includes a navigation panel on the left with 'Inbox' and 'Sendbox' options. The main area has search filters for 'From' and 'To', a search button, and a message: '45 days of files are available for downloading; file activity is available for 365 days by using the Search feature'. Below the filters are buttons for 'Download Selected Files', 'Export All Records', 'Export Displayed View', and 'Delete Selected Files'. A table with columns 'User', 'Sender', 'Receiver', and 'Sender Id' is displayed. The first row shows 'dmnode12 hub, User1' as the user and 'DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , . ' as the sender. The receiver is 'DMNODE12TP' and the sender ID is 'ZZ:DMNODE12HUB'. A legend indicates that a red asterisk denotes a confidential file. The bottom right shows '1 to 1 of 1 Records' and a page number '1'.

Search for Files






To find files in FTS

- 1 In the Navigation panel, click **Retrieve Files** or **Send Files**, depending on the type of files you want to view.
 - **Send Files** lists files your company uploaded.
 - **Retrieve Files** lists files your partners uploaded.

The screenshot shows a detailed view of the File Transfer Service interface. It includes search filters for 'From' and 'To', a search button, and buttons for 'Download Selected Files', 'Delete Selected Files', 'Export All Records', and 'Export Current View of Records'. A table with columns 'Status', 'Receiver', 'Sender Id', 'User', 'Sender', 'File Type', 'File Size (Byte)', 'Receiver Id', 'File Name', 'Created Date', 'Days Before D', 'APRF', and 'SNRF' is displayed. The table contains five rows of data. The first row shows a 'New' status, 'PPNODE10FTS' as the receiver and sender, and 'error-partner...' as the file name. The second row shows a 'Downloaded' status, 'PPNODE10FTS' as the receiver and sender, and '5678' as the file name. The third row shows a 'New' status, 'PPNODE10FTS' as the receiver and sender, and '5678' as the file name. The fourth and fifth rows show 'New' status, 'PPNODE10FTS' as the receiver and sender, and 'test.txt' as the file name. The bottom right shows '1 to 5 of 9 Records' and a page number '2'.

Note: Hub users also have **My View** and **Support User View** tabs at top left. **My View** (default) shows the hub company's view of received and sent files. To use **Support User View** to view a partner's FTS view, see ["View a Partner's FTS"](#) on page 33.

Status column icons on the new page indicate the current status of files:

Icon	Description
 New File	For Retrieve Files only. A new file received by your company. Other actions, such as a file download, have not yet occurred.
 Downloaded File	For Send Files and Retrieve Files . The File has been downloaded from FTS. See "Download Files" on page 30 .
 Submitted	For Send Files only. The file was uploaded to FTS successfully by your company. See "Upload Files" on page 28 .
 Error	For Send Files only. The action to send a file through FTS or upload a file through FTP failed.
 Expired	For Send Files and Retrieve Files . FTS has deleted the file automatically after 45 days of receiving it. The file name remains in the list of files, but users cannot download it.

Note: Hover over the icon to view a description.

To also view a previous status of a file, see ["View File History" on page 32](#).

The column display varies by trading community. For example, columns might display the following information for files in the list:

Column Item (Example)	Description
Sender	The sender of the invoice.
Receiver	The receiver of the invoice.
File Type	The type of file, for example, BIN for a binary, non-EDI file).
File Size	The size of the file (in bytes).
User	For Send Files . The name of user who uploaded the file in FTS). Note: FTS does not record the user name when files are sent to OpenText through FTP or Managed Services.
Days Before Deletion	The number of days remaining before the system automatically deletes the file. FTS retains all files for 45 days after they are uploaded. Users can also delete files manually. See "Delete Files" on page 30 .
Created Date	The timestamp when a file was uploaded to FTS.

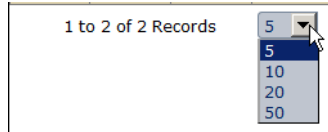
- To list only files associated with a specific metadata value (for example, **Sender**) during upload, or were uploaded during a specific time range, provide that metadata in the fields above the list, then click **Search**.

To use a time range, click the calendar icons next to the **From** and **To** fields, then click a date to insert it.

Search fields vary by trading community.

To restore the original list, remove the search values, then click **Search** again.

- 3 In some trading communities, you can sort a list in one of the following ways:
 - Click a column header to sort the list using that data attribute. Example: **Sender**. To sort in reverse order, click the header again.
 - If a column header contains an empty field, type the first few characters of a value to reorder the list using that value to begin the list.
- 4 To change the number of rows that display in a list, select a different value in the drop-down menu below the list.



- 5 To view later pages in a list, click a page number or pagination link to the right of the number of rows control:



Page Scroll Icon	Description
<	Return to the first page.
<<	Go back one page.
>>	Go forward one page.
>	Go to the last page.

Upload Files

Usually only trading partner companies, not the hub company, upload files in the FTS user interface. Most hub companies send files directly to OpenText, which transfers the files to FTS. However, a hub company can be configured to upload files in FTS.

Uploading files includes specifying metadata associated with the files. Metadata varies by trading community. For example, your community might use metadata to define the sender and receiver for files. FTS validates uploads to ensure that mandatory metadata fields are populated.

Note: FTS also validates to ensure that data is present in the file. No other validations occur.

After a file is uploaded, no alert is sent to the receiver for the file.

To upload files in FTS

- 1 Click **Send Files** in the Navigation Panel.

<input type="checkbox"/>	Status	Status	Receiver	Sender Id	User	Sender	File Type	File Size (Byte)	Receiver Id	File Name	Created Date	Days Before D	APRF	SNRF
<input type="checkbox"/>	Submitted		PPNODE10FTS	ZZ:PPNODE10		PPNODE10FTS	BIN	1110	ZZ:PPNODE10	FREE3078861	Wednesday, D	32	ARP	ARPTST1
<input checked="" type="checkbox"/>	Submitted		PPNODE10FTS	ZZ:PPNODE10	User1, TP1	PPNODE10FTS	BIN	1110	ZZ:PPNODE10	FREE3078861	Wednesday, D	32	ARP	ARPTST1
<input type="checkbox"/>	Submitted		PPNODE10FTS	ZZ:PPNODE10		PPNODE10FTS	BIN	1110	ZZ:PPNODE10	FREE3078861	Wednesday, D	32	ARP	ARPTST
<input type="checkbox"/>	Submitted		PPNODE10FTS	ZZ:PPNODE10	User1, TP1	PPNODE10FTS	BIN	1110	ZZ:PPNODE10	FREE3078861	Wednesday, D	32	ARP	ARPTST
<input type="checkbox"/>	Submitted		PPNODE10FTS	ZZ:PPNODE10		PPNODE10FTS	BIN	972	ZZ:PPNODE10	LINCELEC361	Wednesday, D	32	ARP	ARPTST4

- 2 Click **Send New File**.

The Send File dialog box opens.

- 3 Click **Select File**.

- 4 Browse to the file that you want to upload to FTS, and click **Open**.

Note: The maximum file size is 50MB.

- 5 Provide metadata to associate with the file.

Note: A red asterisk (*) indicates the field is required. For example, a file type of ACH might require entering a bank name in a different field. In addition, some fields might be required if you provide some other values.

- 6 Click **Send**. The dialog box remains open.

To remove the message that displays in the dialog box, click the **X** at the far right of the message.

- 7 Do one of the following:

- To upload another file, repeat the steps for the **Send File** dialog.
- To close the **Send File** dialog, click **Close**. The uploaded file displays at the top of the **Send Files** list.

For a description of the list pages, see ["Search for Files" on page 26](#).

Download Files

Use this procedure to download files from **Retrieve Files** (files your partner sent to you for download in FTS) or **Send Files** (files your company uploaded to FTS for download by your trading partner).

You can download a file with any status.

To view a file, first download it, then open it. You cannot open files in FTS.

To export metadata for files, see [“Export FTS File Metadata” on page 31](#).

(Hubs only) To view whether or not your trading partner downloaded a file, view the partner’s FTS. See [“View a Partner’s FTS” on page 33](#).

To download files in FTS

- 1 In the panel at left, Click **Retrieve Files** or **Send Files**.
- 2 Find files to download. See [“Search for Files” on page 26](#).
- 3 In the file list, select the check boxes of files you want to download.

Note: To download all files on the current page, check the check box in the header row. This does not download all files in a list with multiple pages.

<input type="checkbox"/>	Status	Status	Receiver	Sender Id	User	Sender	File Type	File Size (Byte)	Receiver Id	File Name	Created Date	Days Before Di
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10		PPNODE10FTS	BIN	262	ZZ:PPNODE10	error-partner.T	Sunday, Janus	43
<input type="checkbox"/>		Downloaded	PPNODE10FTS	ZZ:PPNODE10		PPNODE10FTS	BIN	245	ZZ:PPNODE10	5678	Monday, Decer	23
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10		PPNODE10FTS	BIN	245	ZZ:PPNODE10	5678	Monday, Decer	23
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10		PPNODE10FTS	BIN	43	ZZ:PPNODE10	test.txt	Wednesday, D	5
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10	Hub, User1	PPNODE10FTS	BIN	43	ZZ:PPNODE10	test.txt	Wednesday, D	5
<input type="checkbox"/>		Downloaded	PPNODE10FTS	ZZ:PPNODE10		PPNODE10FTS	BIN	140235	ZZ:PPNODE10	Project_Charte	Wednesday, N	0

- 4 Above the list, click **Download Selected Files**, or right-click the table and in the menu select **Download Selected Files**. A confirmation message displays. Multiple files save in a zip file.

- 5 Open or save the file(s). The **Downloaded** icon displays in the file row.

Delete Files

To delete uploaded files

The default file retention period is 45 days after upload. The **Days Before Deletion** column in the **Retrieve Files** and **Send Files** lists indicates how many days remain before the system automatically deletes a file.

OpenText archives automatically deleted files for another 320 days.

To delete files in FTS

- 1 In the panel at left, Click **Retrieve Files** or **Send Files**.
- 2 Find files to delete. See [“Search for Files” on page 26](#).

3 Check the check boxes for the files you want to delete.

Download Selected Files		Delete Selected Files		Export All Records		<input type="checkbox"/> Export Current View of Records						
<input type="checkbox"/>	Status	Status	Receiver	Sender Id	User	Sender	File Type	File Size (Byte)	Receiver Id	File Name	Created Date	Days Before Di
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10F		PPNODE10FTS	BIN	262	ZZ:PPNODE10F	error-partner.T	Sunday, Janua	43
<input type="checkbox"/>		Downloaded	PPNODE10FTS	ZZ:PPNODE10F		PPNODE10FTS	BIN	245	ZZ:PPNODE10F	5678	Monday, Decer	23
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10F		PPNODE10FTS	BIN	245	ZZ:PPNODE10F	5678	Monday, Decer	23
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10F		PPNODE10FTS	BIN	43	ZZ:PPNODE10F	test.txt	Wednesday, D	5
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10F	Hub, User1	PPNODE10FTS	BIN	43	ZZ:PPNODE10F	test.txt	Wednesday, D	5
<input type="checkbox"/>		Downloaded	PPNODE10FTS	ZZ:PPNODE10F		PPNODE10FTS	BIN	140235	ZZ:PPNODE10F	Project_Charte	Wednesday, N	0

4 Click **Delete Selected Files**. A confirmation message displays, and FTS removes that file row

Note: You can also right-click on the row of a file, then click **Delete** from the menu that displays.

Export FTS File Metadata

Use this procedure to export metadata of the files in **Retrieve Files** or **Send Files**.

This action exports only the metadata associated with files, not the file content.

To download files, see [“Download Files” on page 30](#).

To export FTS file metadata

- 1 From the Navigation Panel, click **Retrieve Files** or **Send Files**.
- 2 To narrow the list of files to only those that you want to export, use the search fields above the list to show only files of interest. See [“Search for Files” on page 26](#).

Download Selected Files		Delete Selected Files		Export All Records		<input type="checkbox"/> Export Current View of Records	
<input type="checkbox"/>	Status	Status	Receiver	Sender	Sender	File Type	File Size (Byte)
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PP	PPNODE10FTS	BIN	262
<input type="checkbox"/>		Downloaded	PPNODE10FTS	ZZ:PPNODE10	PPNODE10FTS	BIN	245
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10F	PPNODE10FTS	BIN	245
<input type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10F	PPNODE10FTS	BIN	43
<input checked="" type="checkbox"/>		New	PPNODE10FTS	ZZ:PPNODE10F	Hub, User1	PPNODE10FTS	43

3 (Optional) To export only records on the current page in the list, not all pages, select **Export Current View of Records** above the list.

4 Click **Export All Records**, then select **PDF**, **CSV**, or **Excel** to specify the file format for the export file.

5 In the dialog box, select whether to open or save the export file. Click **OK** to continue.

View File History

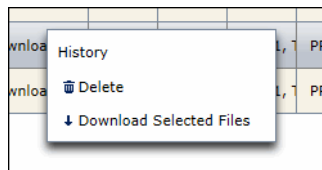
Use this procedure to view the file history, such as when the file was uploaded or downloaded.

A trading partner user with a restricted role can view only his or her own actions in a file history. If the user does not have a restricted role, the user can view actions by others users at the same company.

A hub user can view the action history for himself or herself or a trading partner company.

To view status and user for a file in FTS

- 1 Click **Retrieve Files** or **Send Files** from the Navigation Panel.
- 2 Find files to view. See [“Search for Files” on page 26](#).
- 3 In the file list, right-click in the row of the file you want to view. A menu displays.



- 4 Click **History**. A dialog box displays the history of actions for the file.

Note: Close the dialog box before trying view **History** for a different row.

File Status History		
Status	User Name	Status Date
DOWNLOADED	User1, TP1	Thursday, November 20, 2014 01:30:35 GMT
SUBMITTED	User1, TP1	Wednesday, November 19, 2014 02:11:45 GMT
SAVED	User1, TP1	Wednesday, November 19, 2014 02:11:43 GMT

The dialog box contents include the following:

- Status history of the file.
 - Note:** A file in **Submitted** status may also include a **Saved** status that occurred a few seconds earlier. Both occur in FTS after a user uploads a file.
- Login name of the user in your company who uploaded or downloaded the file in FTS.
 - Note:** Your user role might not enable you to see names of other users.
- When the action occurred, such as the dates and times a file was submitted to FTS and downloaded from FTS.

View a Partner's FTS

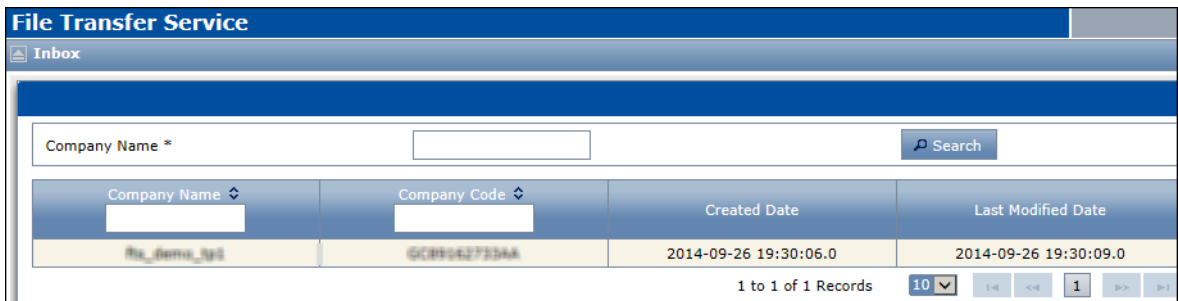
This function is available only to hub companies, not their trading partners. Hubs use it to do the following:

- View lists of files the partner has received and sent.
- View whether or not a partner has downloaded files from you.
- Download files available for download by the partner.
- Export metadata that can be exported by the partner.

Hubs cannot upload files for their partners.

To open a partner's FTS view

- 1 In the panel at left, Click **Retrieve Files** or **Send Files**, depending on which list page you want to view for a partner.
- 2 Click the **Support User View** tab.
- 3 Click **Select Company**.



- 4 Do one of the following:
 - If you see the partner company in the list, click its link in the **Company Name** column to go to the selected list page for the partner.
 - For a long list, type the first few characters the partner name in the **Company Name** field, then an asterisk (*), then click **Search**. Then, in the **Company Name** column click the link of the partner you want to view.
- 5 When the list page opens, you can use perform the following functions:
 - ["Search for Files" on page 26](#)
 - ["Download Files" on page 30](#)
 - ["Export FTS File Metadata" on page 31](#)

Note: If you go to the other list page in FTS (that is, **Retrieve Files** or **Send Files**), FTS will default to the **My View** tab. Repeat the steps above to display a partner view for that list page.
- 6 To switch to your view of the list page, click the **My View** tab.

Active Documents is a reporting tool that provides up-to-date information about your transactions with four reports:

- Activity Summaries
- Exception Summaries
- Document Volume by Type Reports
- Document Volume by Partner Reports

This chapter explains how to use the Active Documents Dashboard to search for transactions and create these reports. Topics include:

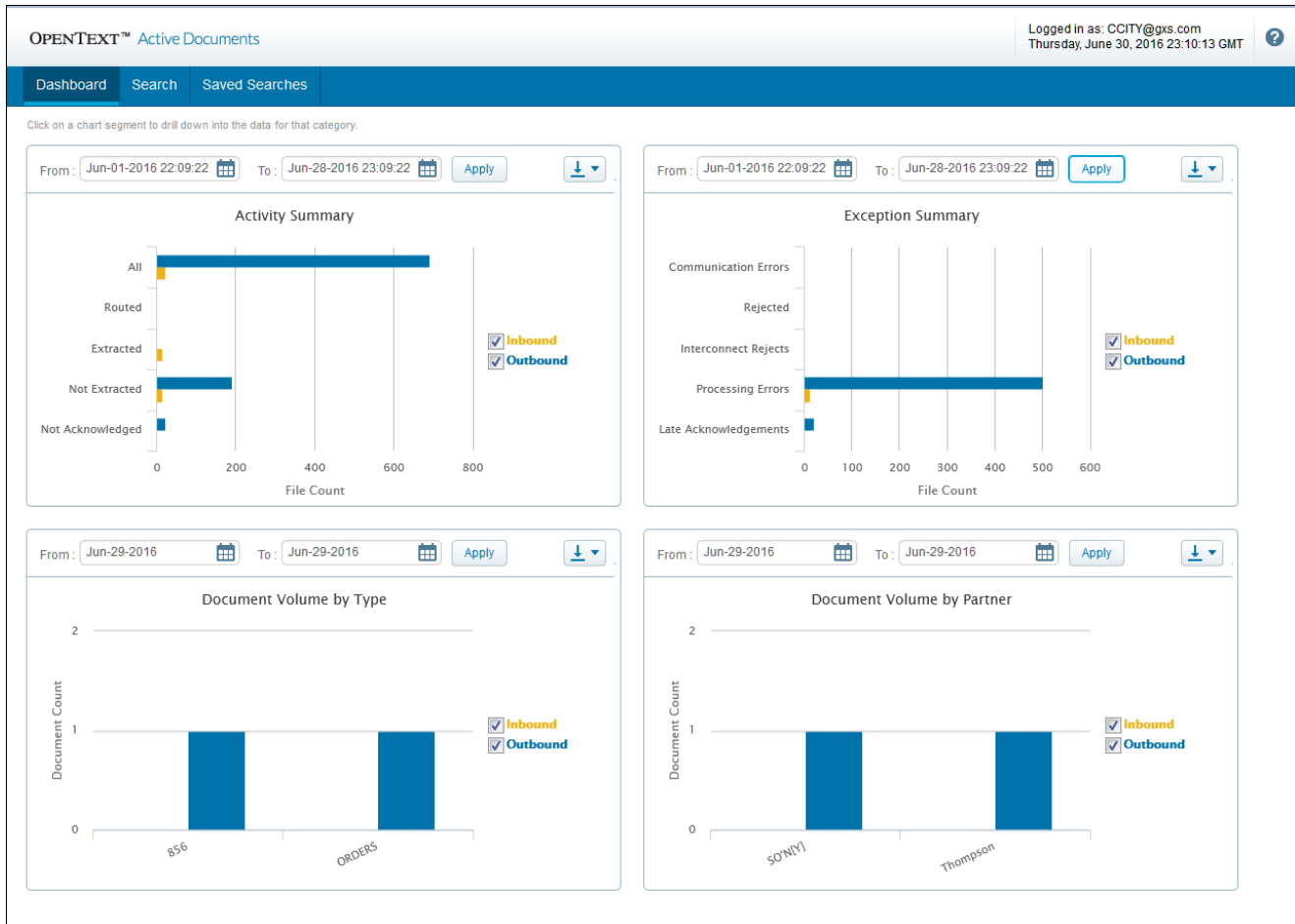
- [“Active Documents Dashboard” on page 36](#)
- [“Search for Transactions” on page 41](#)
- [“View Search Results” on page 52](#)
- [“Save Search Criteria” on page 60](#)
- [“Transaction Process Lifecycle Information” on page 60](#)
- [“Reports” on page 80](#)
- [“Delivered Reports” on page 82](#)

Important: If you are an Active Documents subscriber and do not have access to the most current version of Active Documents, see [“Active Documents Classic”](#) for more information.

Note: You might not see all features described explained in this chapter, depending on your company's subscription agreement and the permissions assigned to your role.

Active Documents Dashboard

The Active Documents Dashboard is divided into four quadrants, one for each report. To open the dashboard, click the **Active Documents** tab.



Dashboard Features

In addition to viewing reports, you can do the following from each report panel:

- Search for data from the current date to the past 90 days.
- View transactions from the Search Results page.
- Change the 24-hour reporting period.
- Export reports data to PDF and CSV file formats.

View Transactions from the Dashboard

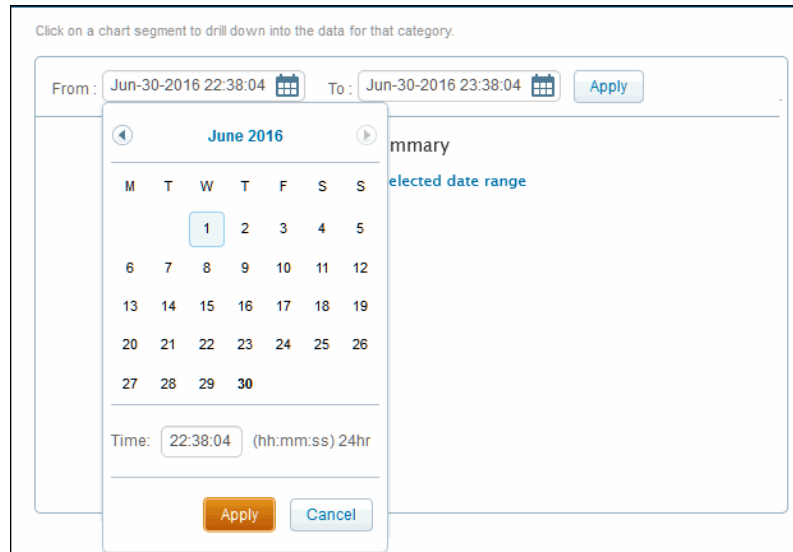
To view transactions from the Active Documents Dashboard

- 1 Double-click on a yellow or blue bar in a report.

Change The Reporting Period

To change the reporting period

- 1 Use the calendar icons to select a time period.

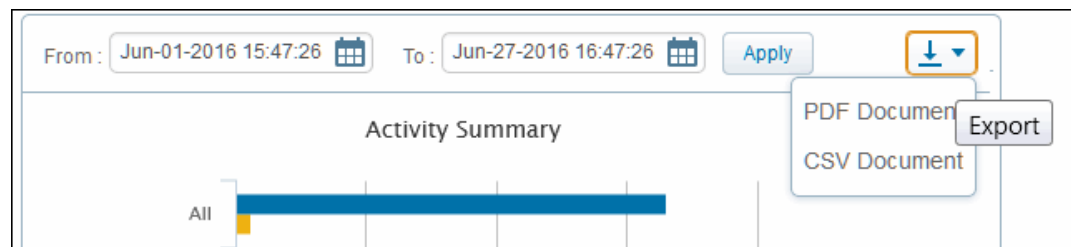


- 2 Click **Apply** in the calendar.
- 3 Click **Apply** again in the quadrant.

Export Data from the Dashboard

To export data to PDF or CSV formats

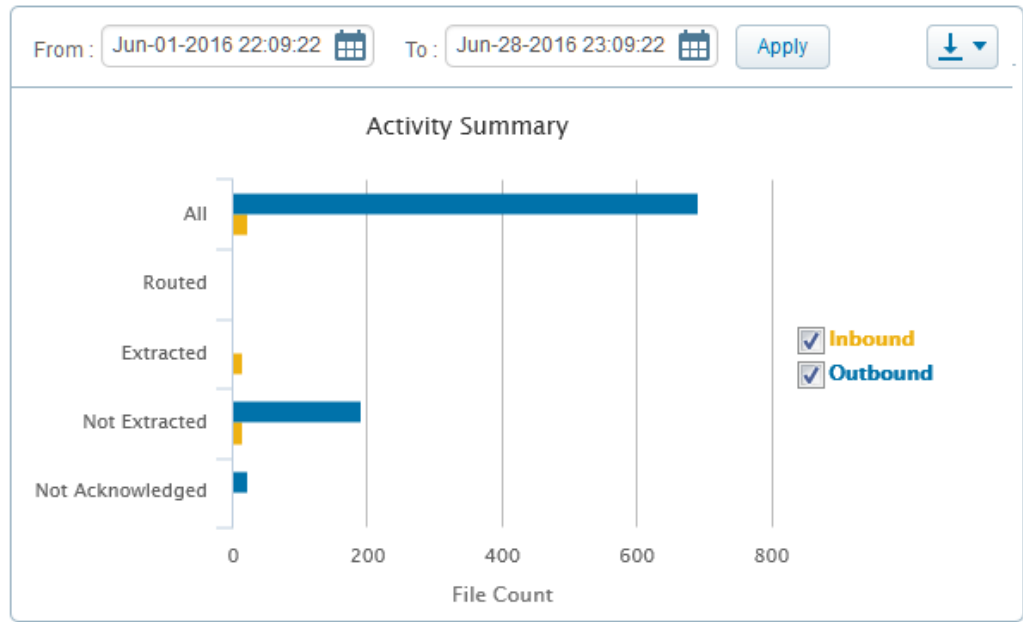
- 1 Click **Export**.



- 2 Select **PDF Document** or **CSV Document**.
- 3 Follow the prompts to open or save the file in the desired format.

Activity Summary

The **Activity Summary** shows the status of both inbound and outbound transactions for a specific time period, along with the number of current records for each status level.

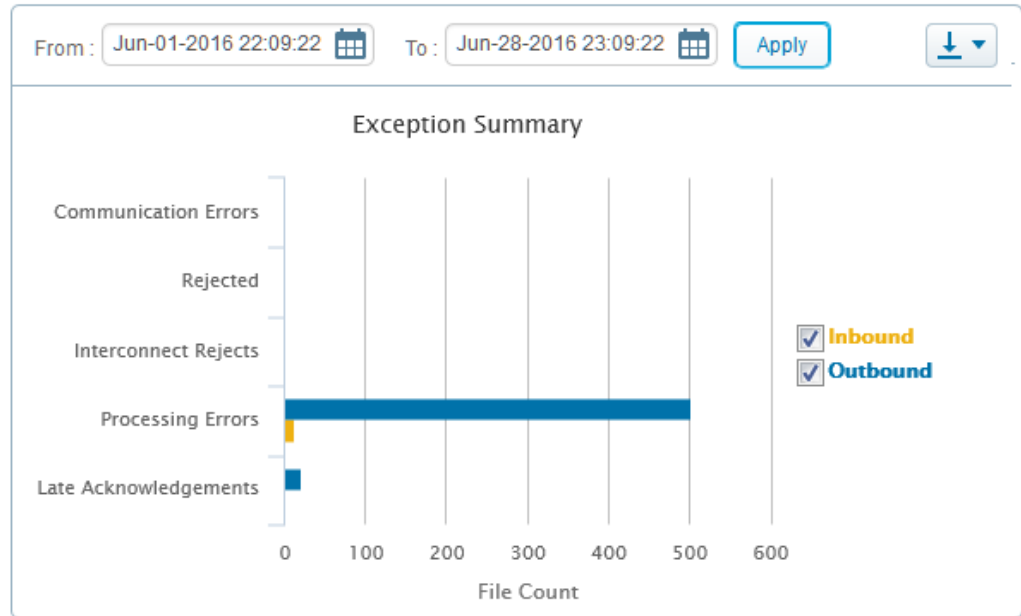


The Activity Summary classifies transactions based on four status levels:

Status Level	Description
Not Extracted	Transactions not picked up by trading partners.
Extracted	Transactions picked up by trading partners.
Not Acknowledged	Transactions unacknowledged by trading partners or for which acknowledgments are late.
Routed	Transactions sent to another Trading Grid product such as Active Invoices with Compliance.

Exception Summary

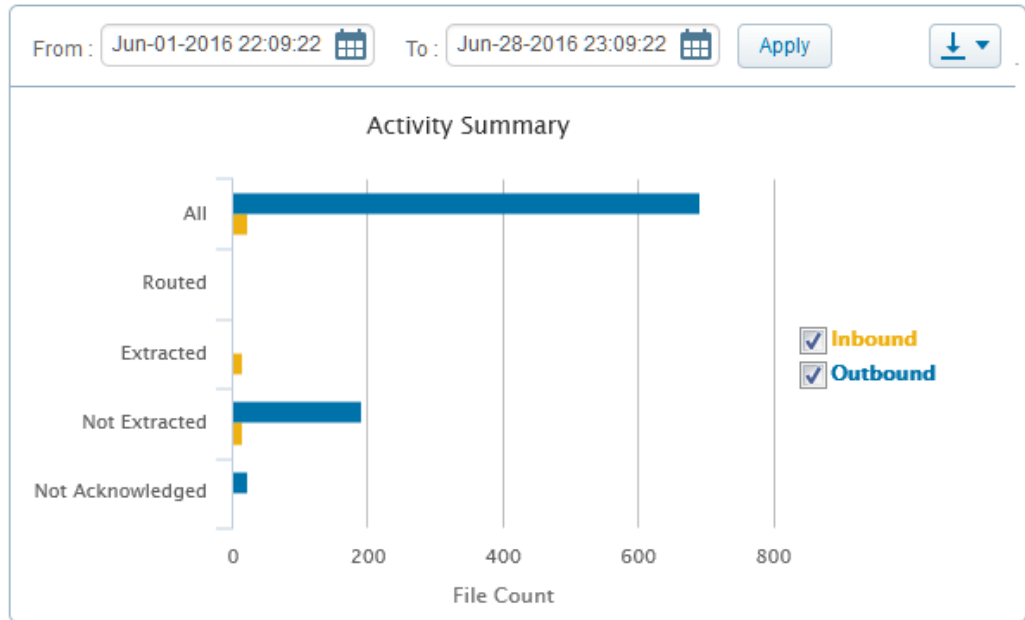
The **Exception Summary** shows exception information for a specific time period, along with the number of current records for each type of exception.



Exception Type	Description
Negative Status Alerts	Not applicable (unless set up by an administrator).
Extended Errors	Errors related to extended events, which your company can publish to OpenText from a back-end system. For example, your system might detect that a file failed to reconcile and report the failure to OpenText. Note: This information displays in Active Documents only if you also subscribe to the Extended Event service.
Unreconciled Extended Events	During transaction processing, the system did not receive all events from a business unit that subscribes to the Extended Event service.
Processing Errors	Errors reported by either the routing system or translation system.
Late Acknowledgements	Files that trading partners have not acknowledged or for which acknowledgments are late.
Communication Errors	There are two types of communication errors: <ul style="list-style-type: none"> Errors reported by the communications protocol, standard, or interface that submitted the transaction. Errors related to Trading Grid Messaging Service (TGMS), typically if TGMS rejects inbound and outbound data submitted by a TGMS subscriber or inbound data from an interconnecting network.
Rejected	Outbound files rejected by trading partner or inbound files rejected by the customer.
Interconnect Rejects	For inbound files only, such as files from a third-party VAN, rejected by OpenText. Available in future releases.

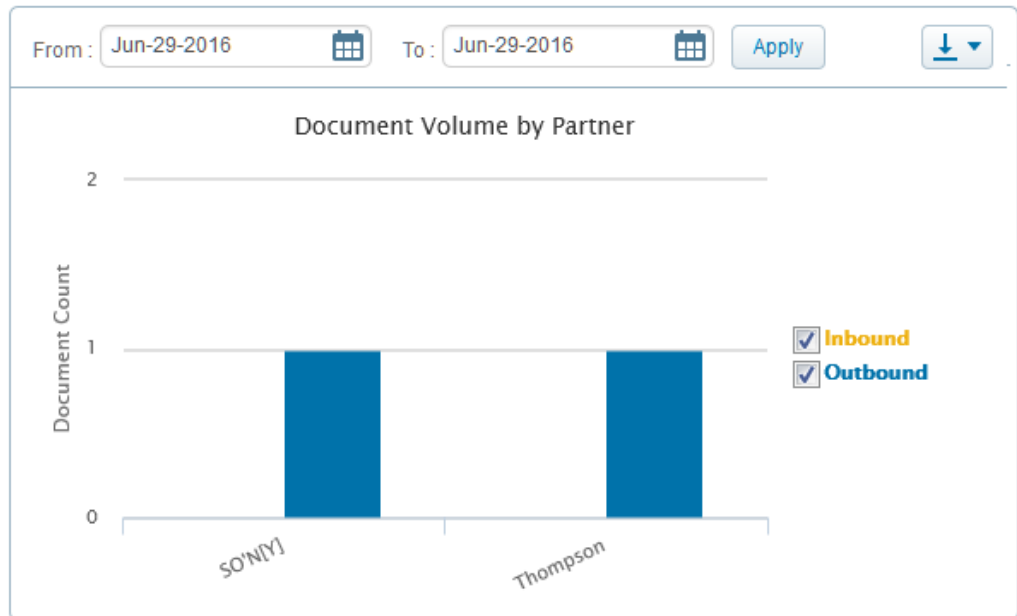
Document Volume by Type Reports

Document Volume by Type reports show the document count for each type of document that was sent and received during a specific time period.



Document Volume by Partner Reports


Document Volume by Partner reports show the number of documents that were sent to a trading partner and received by the trading partner during a specified time period.

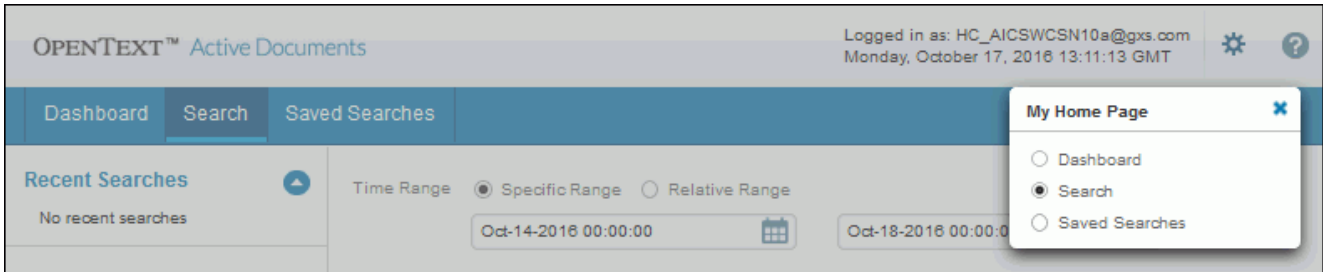


Customize the Active Documents Home Page

You can customize Active Documents tab to display the Dashboard, Search page, or Saved Search page whenever Active Documents opens.

To customize the home page

- 1 Click  at the top of any Active Documents page.
- 2 Select the default view from the My Home Page dialog box.



The page refreshes and opens to the default home page view.

Search for Transactions

You can search for transactions by file format, such as EDI, XML, and user-defined formats, and set the search level for file, interchange, and document levels.

To search for transactions

- 1 Click the **Active Documents** tab in Trading Grid Online.
- 2 Click **Search** from the Dashboard.

The Search page displays.

- 3 Set the criteria for the search.

The following standard search options are available for all searches. To see all the search options, click **Show more options ...**

Search Field	Description
Time Range	<ul style="list-style-type: none"> ■ Specific Range: The default option and the time period is the previous 3 days (or 36 hours). To change the time period, click the calendar icon, then specify a new start date and time or end date and time, as applicable. ■ Relative Range: <ul style="list-style-type: none"> ■ Start Time: Use the drop-down menu to specify when to begin the search, for example, 2 days ago or a specific day and time. ■ End Time: Use the drop-down menu to specify when to end the search such as Tomorrow, Today, or Yesterday. If you select # of Days Ago, the value must be less than the number of days specified for Start Time. <p>For example, search from 5 days ago to 3 days ago, starting at 00:00:00 and ending at 11:59:59 on the last day.</p> <p>Note: Set the preferred time zone in your profile. The time zone then displays on all pages (Search, Results, etc.).</p>
GXS Ref No	<p>A unique reference number or document number, assigned by the Active Documents meta data repository to track the following:</p> <ul style="list-style-type: none"> ■ Transmission files — preceded by F- ■ EDI interchanges — preceded by I- ■ EDI groups ■ EDI documents — preceded by D- ■ XML documents — preceded by U- ■ Trading Grid Messaging Service transactions <p>Note: Click the GXS Ref Num for an item on the Search Results page to view life cycle processing information quickly.</p>
Partner Name	The company name of the trading partner associated with the partner address.
Mailbox	A OpenText mailbox ID (or IDs).
Partner Address	The mailbox ID (or IDs) of the trading partner.
My Address	Your EDI ID or OpenText routing mailbox ID (or IDs).

Search Field	Description
Direction	<p>The direction of the data flow from the ID specified in the My Address field, which can be outbound, inbound, or both.</p> <ul style="list-style-type: none"> ■ Direction of the file: <ul style="list-style-type: none"> ■ Outbound — The company is the sender. ■ Inbound — The company is the receiver. ■ Inbound and Outbound — The sender and receiver both belong to the user's company. ■ Direction of the interchange: <ul style="list-style-type: none"> ■ Outbound — The company is the sender. ■ Inbound — The company is the receiver. ■ Direction of the document: <ul style="list-style-type: none"> ■ Outbound — The company is the sender. ■ Inbound — The company is the receiver. ■ Inbound and Outbound — The sender and receiver are both belong to the same company. <p>It uses the interchange sender and receiver addresses for EDI data. Otherwise, the file sender and receiver are used.</p>
Search Level	<p>The search level refers to the type of data that can be retrieved.</p> <ul style="list-style-type: none"> ■ File — Searches for two types of files, which contain documents passing through the Managed Services environment: <ul style="list-style-type: none"> ■ Files with data that has been translated from one non-EDI data format to another non-EDI data format. ■ Files with data that has been processed as pass-through data (without translation). <p>Options include searching for files with or without errors, negative alerts, and other events.</p> ■ Interchange — Searches for data in an EDI format that reports activity at the interchange level. ■ Document — Searches for electronic business documents, typically, in two formats: <ul style="list-style-type: none"> ■ EDI format, reporting activity at the document level. ■ XML format, processed with XML document identification. <p>Options include viewing related documents (for example, Invoices related to Purchase Orders searched for).</p>

4 Click Search.

The Search Results page opens. See [“View Search Results” on page 52.](#)

Search for Transactions by Search Level

The following explains how to perform specific searches based on File, Interchange, and Document Search levels.

To search for a file

- 1 Click **Search** in the Active Documents Dashboard.
- 2 Set the standard search criteria. See "[Search for Transactions](#)" Step 3.
- 3 Select **File** for the search level.
- 4 Set the search criteria for the file search, as applicable. To expand the file Search page, click **Show other options**.

OPENTEXT™ Active Documents

Logged in as: CCITY@gxs.com
 Monday, October 17, 2016 14:10:06 GMT
 ⚙️ ?

Dashboard
Search
Saved Searches

Recent Searches

No recent searches

Time Range ● Specific Range ○ Relative Range

📅

📅

GXS Ref No

Partner Name Partner Address My Address

Direction ▼

Both sent and received

Search Level ● File ○ Interchange ○ Document

Application Reference Sender Reference Status ▼

All

Original File Name Communication Type ▼

All

ILog Number

Translation Instance Translation Session Number Service Reference

Key Name

[Show fewer options...](#)

Search Reset

Search Field	Description
Application Reference	The application reference for the file, which typically indicates a file or document type.
Sender Reference	A number or alpha-numeric value that references the file in the routing process. The system assigns this value during the routing cycle.
Status	<p>A drop-down list of possible statuses for a search, based on the platform, tracking level, and configuration. Status searches can apply to inbound and outbound transactions.</p> <p>In Managed Services, you can search for the following status:</p> <ul style="list-style-type: none"> ■ With Errors ■ Without Errors ■ With Negative Alerts — The last status alert was for an error or an event that did not occur within a specified time period for the event type. ■ Without Negative Alerts — The status alert for the file was for an event that occurred within the specified time period for the event type. <p>In other implementations, you might also be able to search on these statuses:</p> <ul style="list-style-type: none"> ■ Extracted — The trading partner retrieved the document from the mailbox or interconnect service. ■ Unextracted — The trading partner did not retrieve the document from the mailbox or interconnect service. ■ Rejected (by OpenText) ■ Rejected from Interconnect ■ Incomplete — Incomplete itineraries (OpenText instructions for processing a document) ■ All
Original File Name	The name of the original file that was sent.
Communication Type	The communications protocol, standard, or interface used to submit a transaction to the Trading Grid.
ILOG Number	<p>Input Log Number. A unique, 11-digit number assigned by the system to identify a file transmitted by the Sender.</p> <p>This number is based on a combination of the month, day, Greenwich Mean Time, and the decimal fraction of the hour.</p>
Mailbag ID	A unique number that references an interconnect service such as a third-party VAN.
Translation Instance	<p>Identifies which Application Integrator translation instance processed the transaction.</p> <p>The number of translation instances depends on your system implementation.</p>
Translation Session Number	A unique number assigned to each translation process.
Service Reference	A unique identifier assigned by the messaging platform. Typically for internal use.

Search Field	Description
Key Name	The type and value of a document identifier, assigned by the sender to identify a particular document, for example, Purchase Order Number. Note: If using TGMS, select DOCUMENT ID .
<i>key value</i>	Type the identifier value(s) for the selected key. For example, type the actual PO Number or Product ID to use in the search. You can type a partial value ending in an asterisk (*) for the system to return any documents with the key value that begins with those characters. You can add multiple values separated by a comma.
<i>Primary Key</i>	Select this option if the first key you entered is the primary key.
+Add Another Key	Click this link to add one or more secondary keys.

5 Click **Search**.

To search for an interchange

- 1 Click **Search** in the Active Documents Dashboard.
- 2 Set the standard search criteria. See “[Search for Transactions](#)” Step 3.
- 3 Select **Interchange** for the search level.

Search Level File Interchange Document

Interchange Control Number Production/Test Flag

4 Set the search criteria for the interchange search.

Search Field	Description
Interchange Control Number	A number assigned by EDI systems to the interchange header and trailer segments of an EDI file to verify data integrity.
Production/Test Flag	A field or flag in the EDI interchange header for ANSI X12 formats, indicating if a transaction is for testing or production purposes. Users can send test transactions in the production system to Trading Partners, and this flag distinguishes which transactions are test and which are production. Consult your Trading Partner to determine how to use this flag.

5 Click **Search**.

To search for a document

- 1 Click **Search** in the Active Documents Dashboard.
- 2 Set the standard search criteria. See “[Search for Transactions](#)” Step 3.
- 3 Select **Document** for the search level.

Set the search criteria for the document search, as applicable. To expand the document Search page, click **Show other options**.

Parameter	Description
Document Type	<p>An EDI code that identifies a specific type of EDI document, such as 810 or INVOICE.</p> <p>To search for multiple Document Types: To search for multiple types of documents, separate each type with a comma. For example, type 810, INVOICE.</p>
Status	<p>A drop-down list of possible statuses for a search, based on the platform, tracking level, and configuration. Status searches can apply to inbound and outbound transactions.</p> <p>In Managed Services, you can search the following statuses, depending on your service subscription:</p> <ul style="list-style-type: none"> ■ Acknowledged ■ Not Acknowledged <p>In any implementation, leave All selected to not search based on a specific status.</p>

Parameter	Description
Key Name	The type and value of a document identifier, such as a purchase order number, assigned by the sender to identify a particular document. Active Invoice for Compliance (AIC) Users: Active Documents provides additional search support for AIC. See "Active Invoices for Compliance (AIC) Additional Search Features" on page 48 TGMS Users: Select DOCUMENT ID . This applies to any type of document identification number (Purchase Order Number, Invoice Number, Ship Notice Number, etc.), specified in the key value field.
<i>key value</i>	The identifier value, or values, for a selected key. For example, type the actual purchase order number or product ID to use in the search. To search for multiple key values: To search for multiple key values, separate each type with a comma. For example, type 123, 789. Search Tip: Type a partial value, followed by an asterisk (*) to retrieve all documents that begin with those characters, for example, 1234*.
<i>Primary Key</i>	Select this option if the first key typed is the primary key.
+Add Another Key	Click this link to add one or more secondary keys.
Functional Group Type	A two-digit code in the group header segment of an ANSI X12 EDI-formatted file that identifies the type of business document it contains such as PO, PS, IN.
Functional Group Control Number	A number assigned by EDI systems to the functional group header and trailer segments of an EDI file to verify data integrity. Typically, this number applies only to data in ANSI X12 format.
My Functional Group Address	Your EDI functional group address. Applies only to the ANSI X12 standard.

4 Click **Search**.


Active Invoices for Compliance (AIC) Additional Search Features

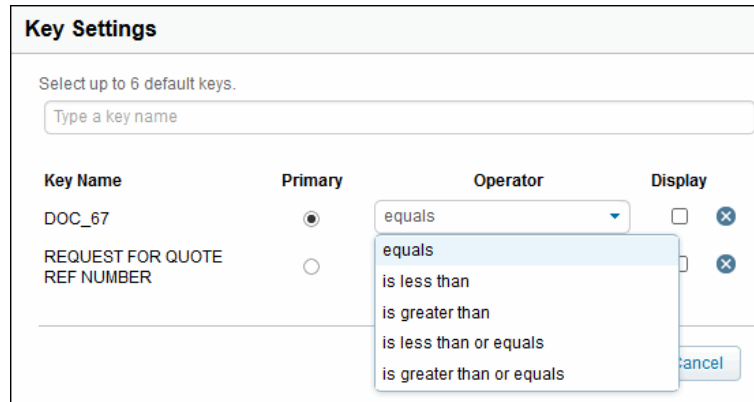
If your company subscribes to AIC, you can also configure search key settings, and search for invoice status, and legal profile names.

Configure Search Key Settings

The Key Settings feature allows you to customize document search keys by setting a key as the primary (default) search key for and setting key operators. Up to six keys can be configured.



To add or configure Search Keys

- 1 Click  next to **Key Name**.
The Key Settings dialog box opens.



The Key Settings dialog box is titled "Key Settings" and contains the following elements:

- A header section with the text "Select up to 6 default keys." and a text input field labeled "Type a key name".
- A table with four columns: "Key Name", "Primary", "Operator", and "Display".
- Two rows of data:

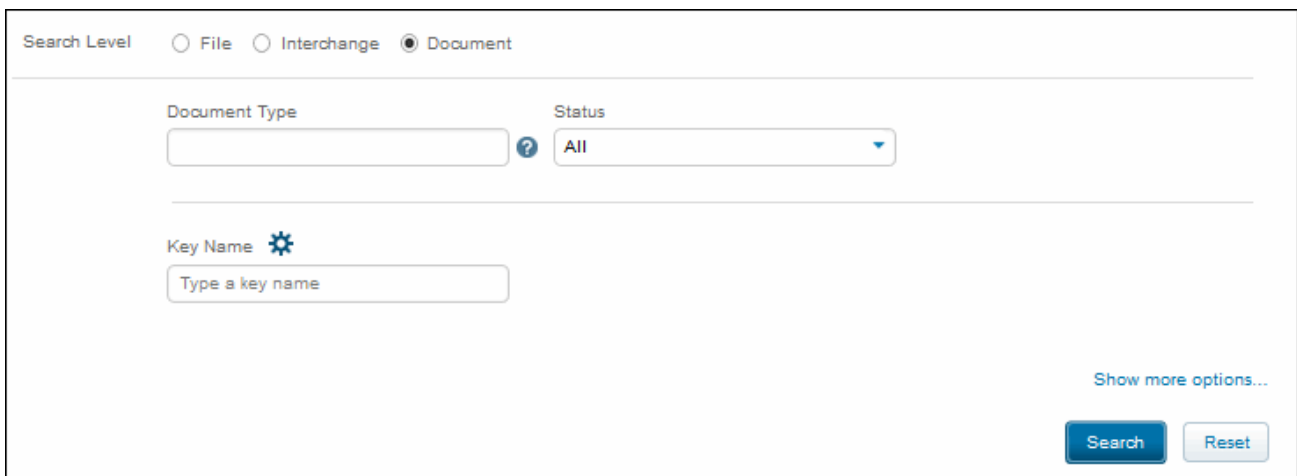
Key Name	Primary	Operator	Display
DOC_67	<input checked="" type="radio"/>	equals	<input type="checkbox"/> 
REQUEST FOR QUOTE REF NUMBER	<input type="radio"/>	equals	<input type="checkbox"/> 
- A dropdown menu for the "Operator" column is open, showing options: "equals", "is less than", "is greater than", "is less than or equals", and "is greater than or equals".
- A "Cancel" button is located at the bottom right of the dialog.

- 2 To add a key, type a key name.
- 3 Specify whether you want the key to be the primary key.
- 4 Set the key operator from the **Operator** drop-down menu for a key.
 - equals
 - is greater than
 - is greater than or equals
- 5 Type a value for the key.
- 6 To always display the key by default, click the **Display** checkbox.
- 7 Click **Save**.

Search By Invoice Status

To search by invoice status

- 1 On the Search page, click **Show more options**.




The Search page interface includes the following elements:

- A "Search Level" section with radio buttons for "File", "Interchange", and "Document" (which is selected).
- A "Document Type" text input field with a help icon (?) next to it.
- A "Status" dropdown menu currently set to "All".
- A "Key Name" section with a gear icon and a text input field labeled "Type a key name".
- A "Show more options..." link at the bottom right.
- "Search" and "Reset" buttons at the bottom right.

The page expands.

Search Level File Interchange Document

Document Type ? Status ▾

Key Name  equals Primary Key

equals ? ×

equals ? ×

equals ? ×

equals ? ×

equals ? ×

[- Clear all keys](#)

Functional Group Type ? Control Number My Group Address

Invoice Status ▾ Download Status ▾

Legal Profile Names My Name Partner Name

[Show fewer options...](#)

2 To search by invoice status, select one of the following options from the **Status** drop-down menu:

- All
- Without Error
- In Contingency
- With Errors
- In Progress

The screenshot shows a search form with the following fields:

- Invoice**: A dropdown menu currently set to 'All'.
- Status**: A dropdown menu that is open, showing options: 'All', 'With Errors', 'Without Errors', 'In Progress', and 'In Contingency'.
- Download Status**: A dropdown menu currently set to 'All'.
- Legal Profile Names**: A text input field.
- Partner Name**: A text input field.

3 To search by download status, select one of the following options from the **Download Status** drop-down menu:

- All
- Sender Invoice Download Complete
- Recipient Invoice Download Complete
- Sender Pending Invoice Download
- Recipient Pending Invoice Download

The screenshot shows the search form with the following fields:

- Invoice**: A dropdown menu set to 'All'.
- Status**: A dropdown menu set to 'All'.
- Download Status**: A dropdown menu that is open, showing options: 'All', 'Sender Pending Invoice Download', 'Sender Invoice Download Complete', 'Recipient Pending Invoice Download', and 'Recipient Invoice Download Complete'.
- Legal Profile Names**: A text input field containing 'My Name'.
- Partner Name**: A text input field.
- Buttons**: 'Search' and 'Reset' buttons.
- Link**: 'Show fewer options...' link.

4 To search by legal profile name, type the name of your company or Trading Partner name in the **Legal Profile Names** section.

5 Click **Search**.

View Search Results

The Search Results page displays the applicable file, document, or interchange transactions, based on your search criteria.

OPENTEXT™ Active Documents Logged in as: CCITY@gxs.com
Friday, October 14, 2016 12:52:15 GMT

Dashboard Search Saved Searches

Recent Searches
12:52:14 GMT

FILTER BY

Sender Address

- ZZ:CIRCITY 32
- ZZ:THOMPSON 3

Receiver Address

- ZZ:THOMPSON 32
- ZZ:CIRCITY 3

Partner Name

- Thompson 35

Direction

- Outbound 32
- Inbound 3

Document Type

- 856 29
- Unknown Category 3
- 850 3

35 Documents Found

Show Search Criteria | Modify Search | Start a New Search

Settings | Export Results | Save Search | More | Refresh

Items Per Page: 10 | 1 - 10 of 35 items

<input type="checkbox"/>	GXS Ref No	Partner Name	Sender	Receiver	Direction	Document Type	Primary Key
<input checked="" type="checkbox"/>	D-1100818	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001
<input type="checkbox"/>	D-1100816	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001
<input type="checkbox"/>	D-1100814	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001
<input type="checkbox"/>	D-1100812	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001
<input type="checkbox"/>	D-1100811	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	536	
<input type="checkbox"/>	D-1100810	Thompson	ZZ:THOMPSON	ZZ:CIRCITY	Inbound	850	FTPSERVER
<input type="checkbox"/>	D-1100808	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001
<input type="checkbox"/>	D-1100806	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001
<input type="checkbox"/>	D-1100805	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	536	

From the Search Results page, you can perform several tasks:

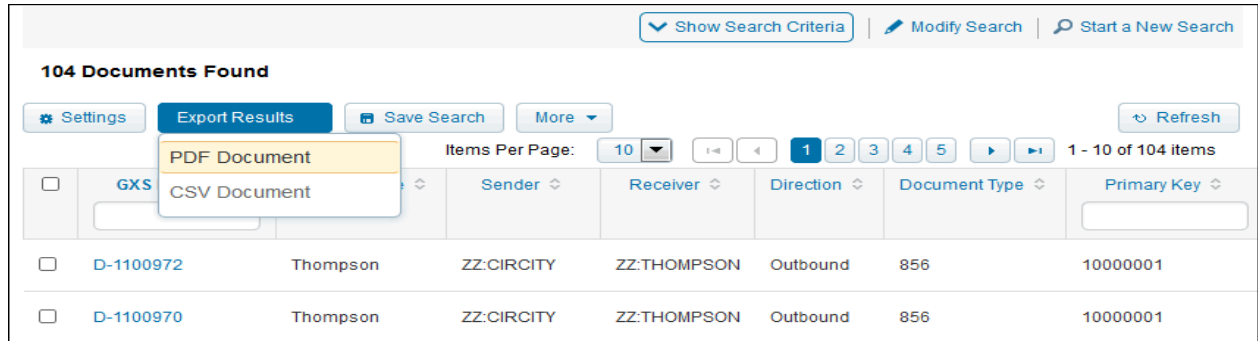
- Download the search results in PDF or CSV format, including batch downloads.
- Download single files or multiple files.
- Create a subset of the search results.
- Specify search filter criteria.
- Change the default settings for search results.
- Save the search criteria.
- Use the filters to create a subset of your results, including by Sender/Receiver Address(es), Trading Partner Name, Direction, and Document Type.

Download Search Results

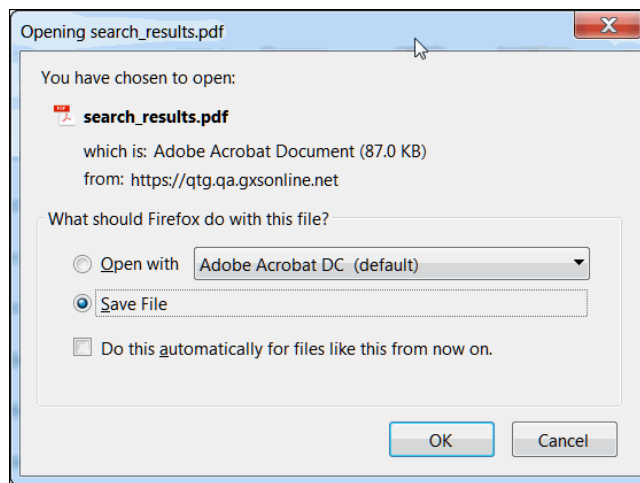
You can download search results in PDF or CSV format.

To download the search results

- 1 On the Search Results page, click **Export Results**.



- 2 Select **PDF Document** or **CSV Document**.
- 3 Follow the prompt to open or save the search results.



The search results display in the desired format, for example, PDF.

Search Criteria								
Start Date/Time: Tuesday, June 14, 2016 00:00:00 GMT								
End Date/Time: Friday, June 17, 2016 00:00:00 GMT								
Search Level: File								
Status: All								
Direction: Both sent and received								

Search Results								
GXS Ref No	File Size	Partner Name	Sender	Receiver	Direction	Application Reference	Sender Reference	File Tracking Date & Time
F-5035208		Thompson	CIRCITY	THOMPSON	OUTBOUND	850	981520	Thursday, June 16, 2016 20:30:10 GMT
F-5035207		Thompson	CIRCITY	THOMPSON	OUTBOUND	850	981521	Thursday, June 16, 2016 20:30:09 GMT
F-5035206		Thompson	CIRCITY	THOMPSON	OUTBOUND	850	981520	Thursday, June 16, 2016 19:45:00 GMT

Download Documents and Files from Search Results

You can download single items from the Search Results page (files, interchanges, and documents), as well as multiple items in a bulk download.

Note: The download limit for multiple items is 20MB. However, there is no size limit for downloading a single file.

Download Single Items

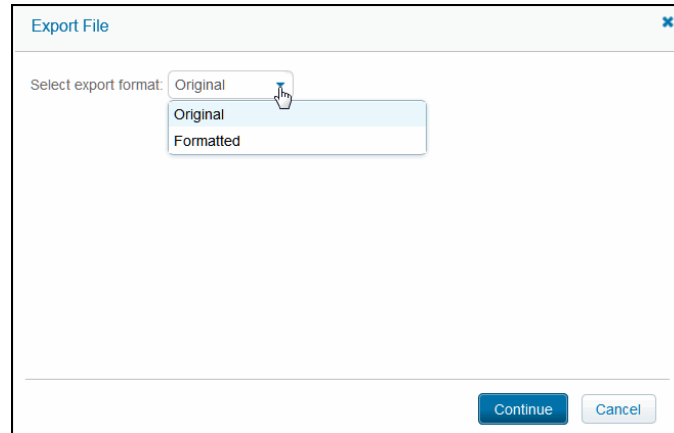
To download single items from the Search Results page

You may wish to download a single file, document or interchange to view just one individual item or if the item's file size is larger than the download limit of 20MB.

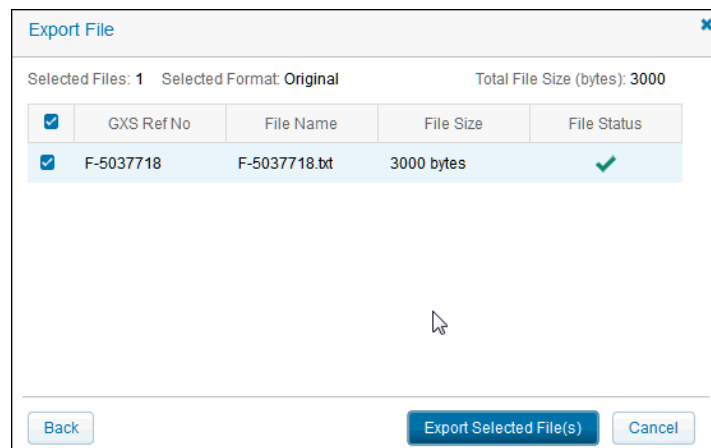
- 1 Click the checkbox for the file you want to download.
- 2 Click **More > Export File**.

The screenshot shows the OpenText search results page. At the top, there are buttons for 'Show Search Criteria', 'Modify Search', and 'Start a New Search'. Below this, it states '104 Documents Found'. There are several action buttons: 'Settings', 'Export Results', 'Save Search', 'More', and 'Refresh'. A pagination bar shows 'Items Per Page' with options 1, 2, 3, 4, 5 and '1 - 10 of 104 items'. The main table has columns: GXS Ref No, Partner Name, Sender, Receiver, Direction, Document Type, and Primary Key. Three rows are visible, all with 'Thompson' as the partner name and 'Outbound' as the direction. A 'More' dropdown menu is open over the first row, showing 'Export File' as the selected option.

- 3 In the Export File dialog box, select the format for the download:
 - **Original:** Refers to the original data in the format as it was received.
 - **Formatted:** Refers to a formatted version with line breaks inserted for easier viewing.



The Export File page displays the item to be downloaded, including the total file size (in bytes).



- 4 Click **Export Selected File(s)**.
- 5 Save the file when downloaded.

Download Multiple Items

To download multiple items from the Search Results page

Note: The examples in the steps below are relevant to a File search, however, the same steps apply to Interchange and Document searches.

- 1 Click the checkboxes for the items you want to download.
 - To select all of the items on the page, click the checkbox at the top of the column.
 - To select up to 100 items on a page at one time, specify the number from the **Items per Page** drop-down menu.

104 Documents Found

Settings Export Results Save Search More Refresh

Items Per Page: 10 25 50 100 1 - 10 of 104 items

<input type="checkbox"/>	GXS Ref No	Partner Name	Sender	Receiver	Direction	Document Type	Primary Key
<input type="checkbox"/>	D-1100972	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001
<input type="checkbox"/>	D-1100970	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001

- 2 Click **More > Export File**.

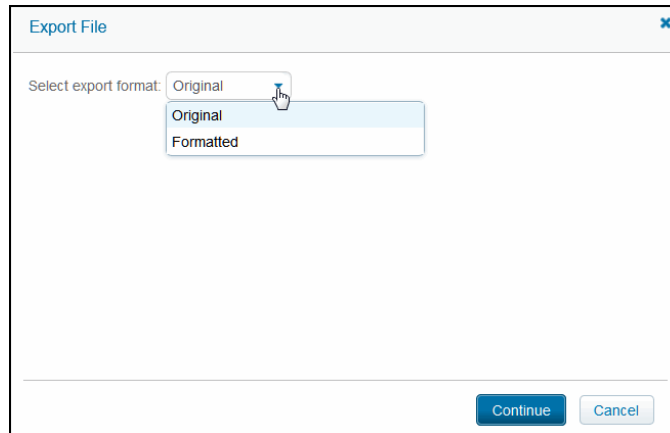
104 Documents Found

Settings Export Results Save Search More Refresh

Items Per Page: 10 25 50 100 1 - 10 of 104 items

<input type="checkbox"/>	GXS Ref No	Partner Name	Sender	Receiver	Direction	Document Type	Primary Key
<input type="checkbox"/>	D-1100972	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001
<input type="checkbox"/>	D-1100970	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001
<input type="checkbox"/>	D-1100964	Thompson	ZZ:CIRCITY	ZZ:THOMPSON	Outbound	856	10000001

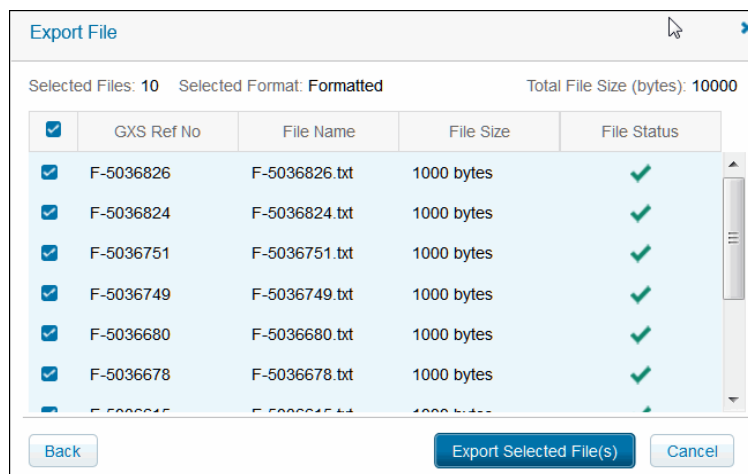
- 3 Select the format for the download from the Export File dialog box:
 - **Original:** Refers to the original data in the format as it was received.
 - **Formatted:** Refers to a formatted version with line breaks inserted for easier viewing.



4 Click **Continue**.

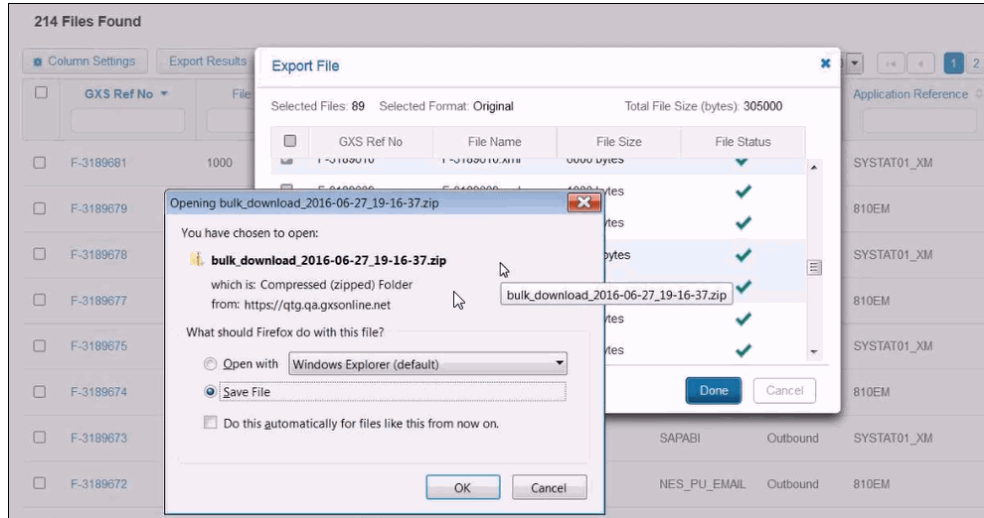
Note: Depending on the number of files, it may take several minutes to download multiple files.

The Export File page displays the list of files to download, including the number of files selected and total file size (in bytes). You can also uncheck files in the list.



5 Click **Export Selected Files(s)** and follow the prompts to bulk download the compressed (zipped) data files.

Note: After the download starts, you cannot cancel or go back to the previous page.

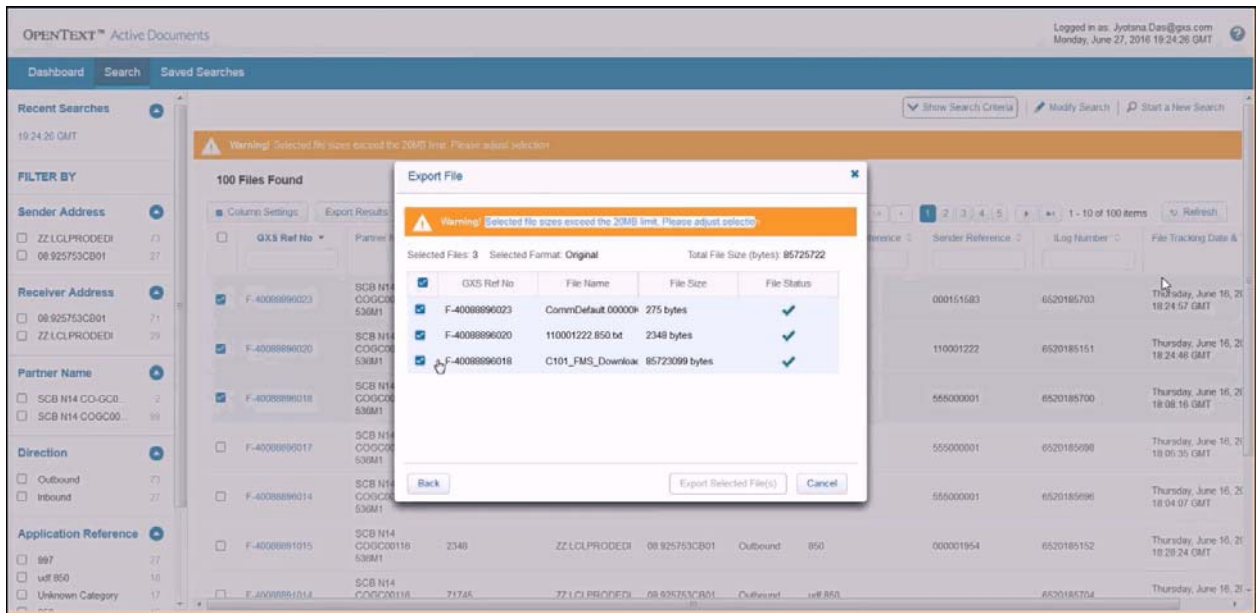


6 Select **Save File** to save the .zip file to your Windows Explorer Downloads folder.

Note: The bulk download feature is also available from the Lifecycle Details page. See [“Transaction Process Lifecycle Information”](#) on page 60.

Bulk File Download Errors

If the total file size for the bulk download exceeds 20MB, a warning displays, and the **Export Selected Files** button is disabled.



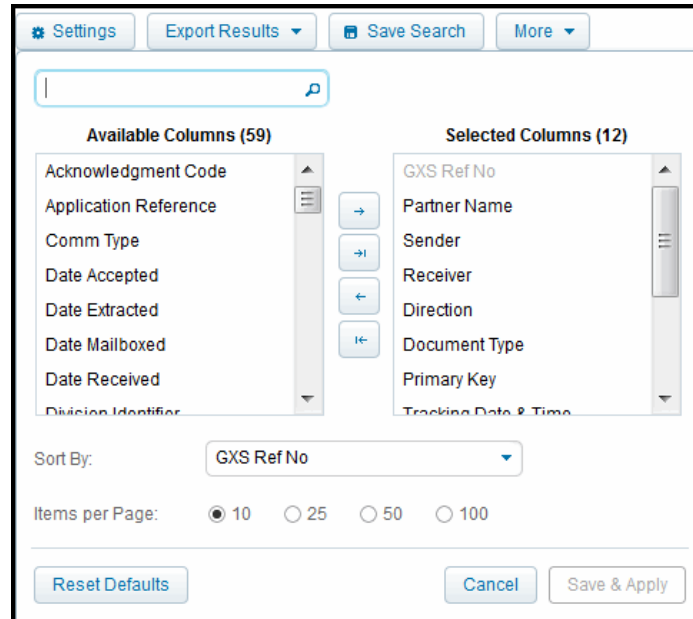
In this case, do any of the following:

- Uncheck the large files that prevent the bulk download, so that the total file size is less than 20MB. Then, click **Export Selected Files**.
- Click **Cancel**, and download the large files individually. See [“Download Single Items”](#) on page 54.

Change Column Settings

To change the column settings on the Search Results page

1 Click **Settings**.



- Scroll or use the text box above the **Available Columns** list to find a column you want to add.
 - Use the arrows to add or remove columns.
 - To change the order of columns displayed, in the **Selected Columns** box, click the column name and drag it to a different position in the list.
 - To change the default sort, select a new column from the **Sort By** dropdown. To change the sort sequence of the current listing only, click on a column heading. For a reverse sort, click the column heading again.
 - Specify the number of items to display per page by checking an **Items per Page** option.
 - To restore the default settings, click **Reset Defaults**,
- 2 Click the **Save & Apply**. These settings are saved until the next time you modify the settings.

Results with More than 7000 Records

For searches that return more than 7,000 results, the system displays the first 7,000 found.

To see the remaining results

- 1 Save the search. See ["To save a Search."](#)
- 2 Schedule a report. See ["Schedule a Report."](#)

Save Search Criteria

To save a Search, you must create the search and generate the results.

To save a Search

- 1 Create and run the search.
- 2 On the Search Results page, click **Save Search**.
A dialog box opens.
- 3 Type a **Search Name**.
- 4 Click **Save**.

To run a saved search

You can use a search that you, or someone else in your organization, have saved.

- 1 Click the **Active Documents** tab.
- 2 On the Dashboard page, click the **Saved Search** tab.
- 3 On the **My Saved Searches** page, you can do the following.
 - To immediately run a search, click the **Search Name** link.
 - To change the parameters of a search, click the **Edit** icon. Make your changes and then, on the Search Results page, click **Save Search** and save the search. If the search has already been scheduled, you must specify a new **Search Name** to save the search.
 - To delete a saved search, click the **Delete** icon.

Important: You cannot delete a saved search until you have deleted it from the Scheduled Reports listing. See "[View Scheduled Reports](#)."

Transaction Process Lifecycle Information

Active Documents captures the processing lifecycle history of files, EDI interchanges, EDI documents, and XML documents as they pass through various tracking points.

Processing lifecycle details provide information about a specific transaction at key processing points in each environment. The points that display in the lifecycle history depend on the path the transaction follows during its lifecycle.

Note: The Transaction Processing Lifecycle can provide visibility into both internal and Managed Services processes in one view. You may have the option to publish edge events to Active Documents. Edge events are transactions from a customer's internal system, such as SAP (an ERP system).

View Process Lifecycle Information

To view processing lifecycle information for a transaction

- 1 Search for a transaction, and locate the record on the Search Results page. See "Search for Transactions."
- 2 Click the link in the **GXS Reference Number** column on the Search Results page.

The Lifecycle Details page displays. The Summary Information section shows the processing history of a file, interchange, or document.

The screenshot displays the 'Document Details' section for transaction D-1100818. It includes a navigation menu on the left with 'Recent Searches' and 'Browsing History'. The main content area is divided into 'Summary Information' and 'Document Details'.

Summary Information

Company CIRCITY's	Partner Name Thompson	Error Count 0
Sender ZZ:CIRCITY	Receiver ZZ:THOMPSON	Direction OUTBOUND
Sender Name Circuit&City/ Address_testing_QUAL	Receiver Name Thompson Address	
GXS Ref No D-1100818	Document Type 856	Standard ANSI

Keys

Key	Primary Key	FA Received Status
396*	10000001	Status: OUTSTANDING
337	20021212	Status Message: WORK REQUIRED
373	00	Status Details: DELINQUENT EMAIL SENT


Document Details


Processing Steps (2) Input & Output Files

Expand All | Collapse All

Status	Step	Activity	Start Date & Time	End Date & Time	
✓ Completed	1	Enterprise Acceptance	Managed Services Platform	Wednesday, September 28, 2016 05:30:06 GMT	Wednesday, September 28, 2016 05:30:06 GMT
✓ Completed	2	Enterprise Mailboxed	Managed Services Platform	Wednesday, September 28, 2016 05:30:06 GMT	Wednesday, September 28, 2016 05:30:06 GMT


The Details section lists the processing steps for the transaction, translator, application, or other service used to process the transaction.

- To view the details of a processing stage, click  next to a step (in the Step column).

Document Details 

Processing Steps (1) Errors (1) Input & Output Files

Expand All | Collapse All

Status	Step	Activity	Start Date & Time	End Date & Time
✓ Completed	1  Enterprise Acceptance	Managed Services Platform	Monday, June 27, 2016 01:00:29 GMT	Monday, June 27, 2016 01:00:29 GMT

Step Information

File Context Information

GXS Ref No: F-5037438 File Size: 1024000

Sender: CIRCITY

Receiver: THOMPSON


Sender Reference: 000174661


Application Reference:

Service Reference: 3676512610607583

View Input and Output Files (Translation Step)





If a process lifecycle includes a Translation step, you can view and download both Input and Output files.

- In the Details section of the Lifecycle Details page, click  next to the Translation processing step.

Document Details 

Processing Steps (4) Input & Output Files

Expand All | Collapse All

Status	Step	Activity	Start Date & Time	End Date & Time
✓ Completed	1  Enterprise Acceptance	Managed Services Platform	Thursday, June 02, 2016 14:35:13 GMT	Thursday, June 02, 2016 14:35:13 GMT
✓ Completed	2  Enterprise Mailboxed	Managed Services Platform	Thursday, June 02, 2016 14:35:13 GMT	Thursday, June 02, 2016 14:35:13 GMT
✓ Completed	3  Translation	Managed Services Platform	Thursday, June 02, 2016 14:35:21 GMT	Thursday, June 02, 2016 14:35:34 GMT
✓ Completed	4  Enterprise Extracted	Managed Services Platform	Thursday, June 02, 2016 14:35:35 GMT	Thursday, June 02, 2016 14:35:35 GMT

- Click **View Input & Output File(s)**.

Document Details ▲

Processing Steps (4) Input & Output Files

Expand All | Collapse All

Status	Step	Activity	Start Date & Time	End Date & Time
✓ Completed	1	Enterprise Acceptance	Managed Services Platform	Thursday, June 02, 2016 14:35:13 GMT
✓ Completed	2	Enterprise Mailboxed	Managed Services Platform	Thursday, June 02, 2016 14:35:13 GMT
✓ Completed	3	Translation	Managed Services Platform	Thursday, June 02, 2016 14:35:21 GMT

[View Input & Output File\(s\)](#)

Step Information

File Context Information

GXS Ref No: F-5034125 File Size: 3072000

Sender: THOMPSON

Receiver: CIRCITY

Sender Reference: 403432690

Application Reference: PURORD

Service Reference: 3673866909365901

Input Summary

File Size: 2485 Instance: TGOAIBridge

UDF File Count: 0 Session Number: 028606

UDF Document Count: 0 Status: COMPLETED

EDI File Count: 1

Interchange Count: 1

EDI Document Count: 1

Output Summary

UDF File Count: 0

UDF Document Count: 0

EDI File Count: 1

Terminated File Count: 1

Interchange Count: 1

EDI Document Count: 1

Some translation steps may include multiple input or multiple output files. You can download single files, or all all output or input files at one time.

3 Select Show: Output Files or Show: Input Files.

Document Details ▲

Processing Steps (4) Input & Output Files

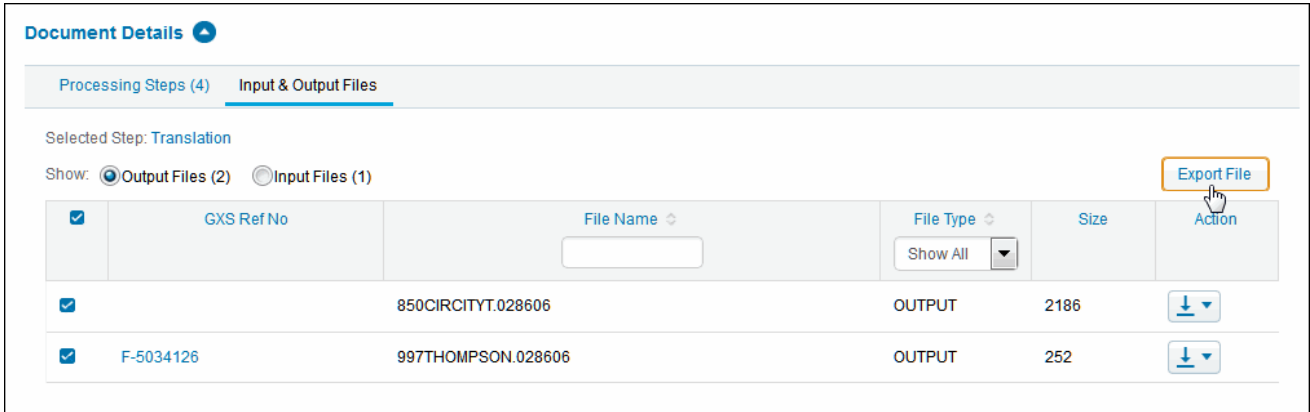
Selected Step: Translation

Show: Output Files (2) Input Files (1) Export File

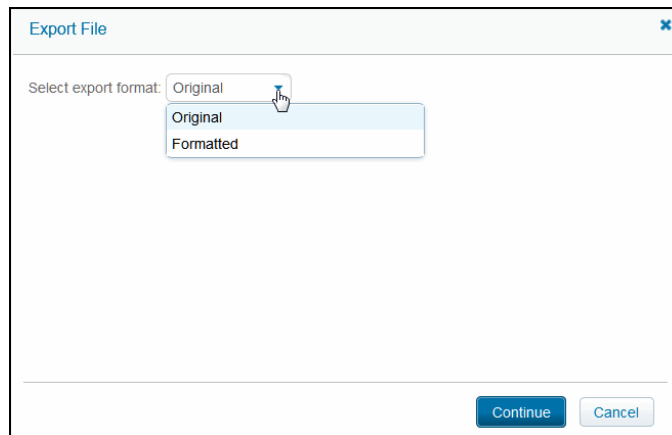
<input type="checkbox"/>	GXS Ref No	File Name	File Type	Size	Action
<input type="checkbox"/>	F-5034125	028606	INPUT	2485	

The available output or input files display in the page list.

4 Click the checkboxes for the files you want to download, and click Export File.



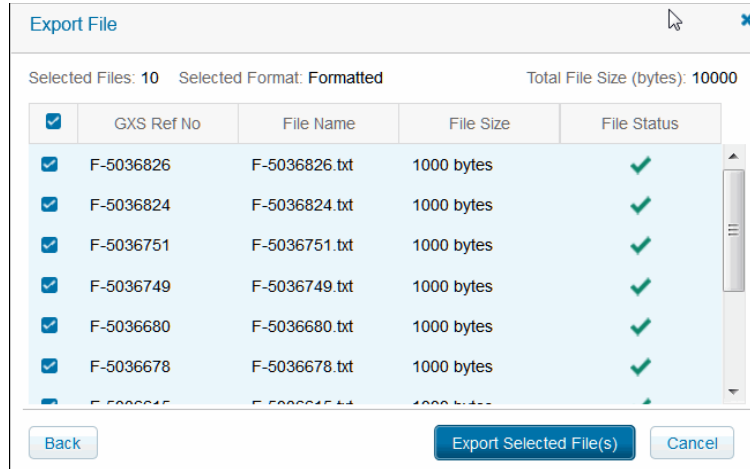
- In the Export File dialog box, select the format for the download:
 - Original:** Refers to the original data in the format as it was received.
 - Formatted:** Refers to a formatted version with line breaks inserted for easier viewing.



- Click **Continue**.

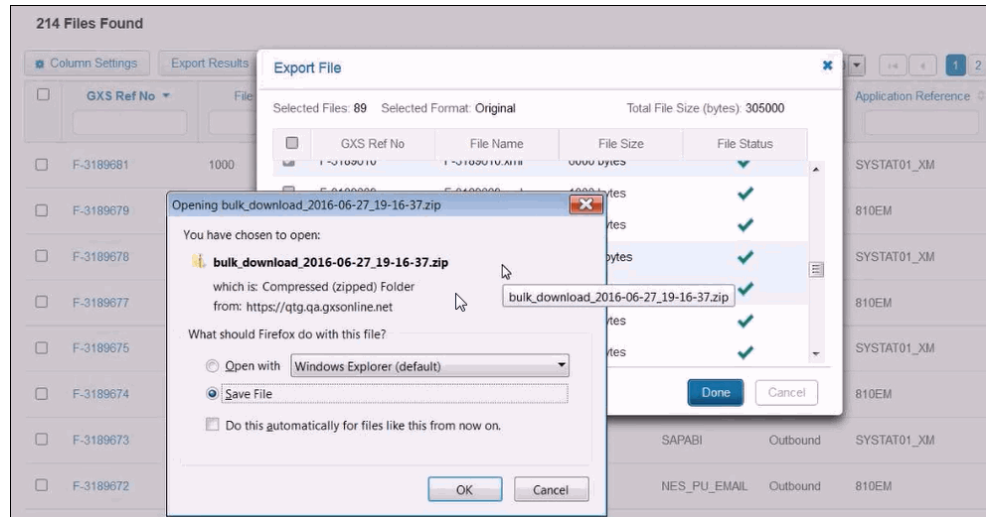
Note: Depending on the number of files, it may take several minutes to download multiple files.

The Export File page displays the list of files to download, including the number of files selected and total file size (in bytes). You can also uncheck files in the list.



7 Click **Export Selected Files(s)** and follow the prompts to bulk download the compressed (zipped) data files.

Note: After the download starts, you cannot cancel or go back to the previous page.

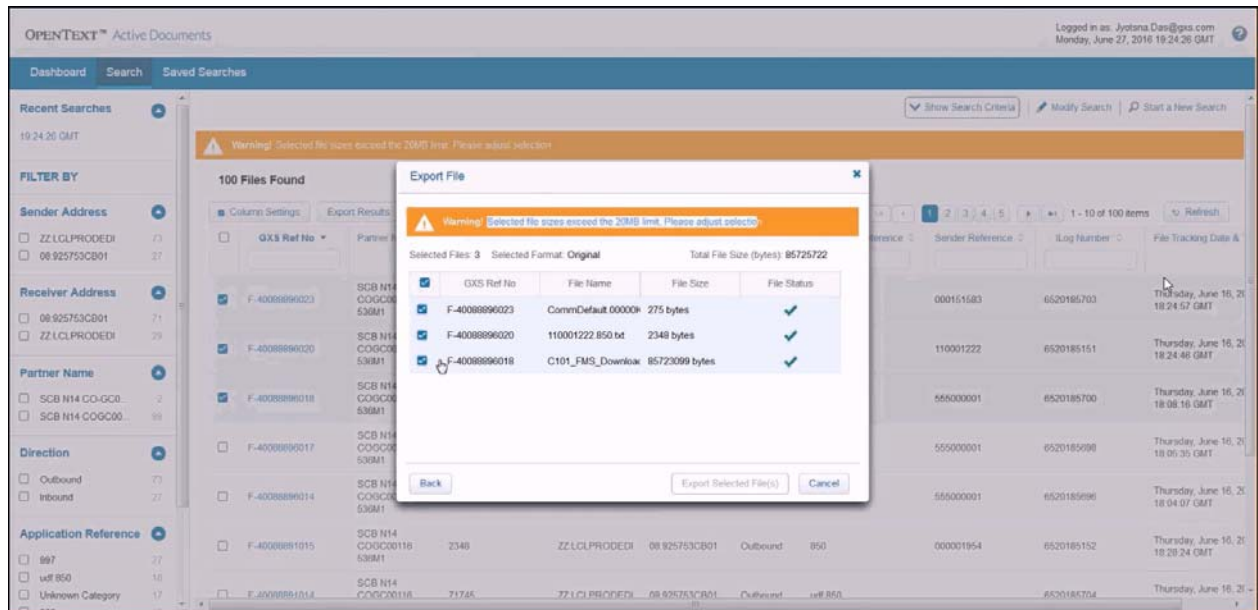


8 Select **Save File** to save the .zip file to your Windows Explorer Downloads folder.

Note: The bulk download feature is also available from the Lifecycle Details page. See [“Transaction Process Lifecycle Information”](#) on page 60.

Bulk File Download Errors

If the total file size for the bulk download exceeds 20MB, a warning displays, and the **Export Selected Files** button is disabled.



In this case, do any of the following:

- Uncheck the checkboxes for the large files that prevent the bulk download, so that the total file size is less than 20MB. Then, click **Export Selected Files**.
- Click **Cancel**, and download the large files individually. See [“Download Single Items”](#) on page 54.

Download Process Lifecycle Information

You can download documents and files from the Process Lifecycle page in several formats by exporting the data file to a .txt file or exporting the details to a PDF.

Download Data Files

To export a data file to a text file

- 1 Click **Export Data File**.
- 2 Select the format for the download:
 - **Original**: The original data in the format as it was received.
 - **Formatted**: A formatted version with line breaks for easier viewing.

Search Results > D-1100972 Start a New Search

Lifecycle Content **Document Details** Related Business Documents

Document Rendering Export Details to PDF **Export Data File**

Original File
Formatted File

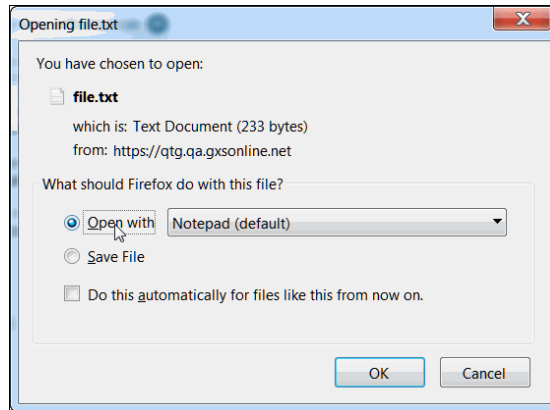
Summary Information

Company CIRCITY's	Partner Name Thompson	Error Count 0
Sender ZZ:CIRCITY	Receiver ZZ:THOMPSON	Direction OUTBOUND
Sender Name Circuit&City/ Address_testing_QUAL	Receiver Name Thompson Address	
GXS Ref No D-1100972	Document Type 856	Standard ANSI

Keys	*Primary key	FA Received Status
396*	10000001	Status: OUTSTANDING
337	20021212	Status Message: WORK REQUIRED
373	00	Status Details: DELINQUENT EMAIL SENT
		Status Date: Monday, October 17, 2016 06:00:19 GMT
		Cycle Number: 2
		Delinquency Indicator: Y
		Do Not Track Indicator: N

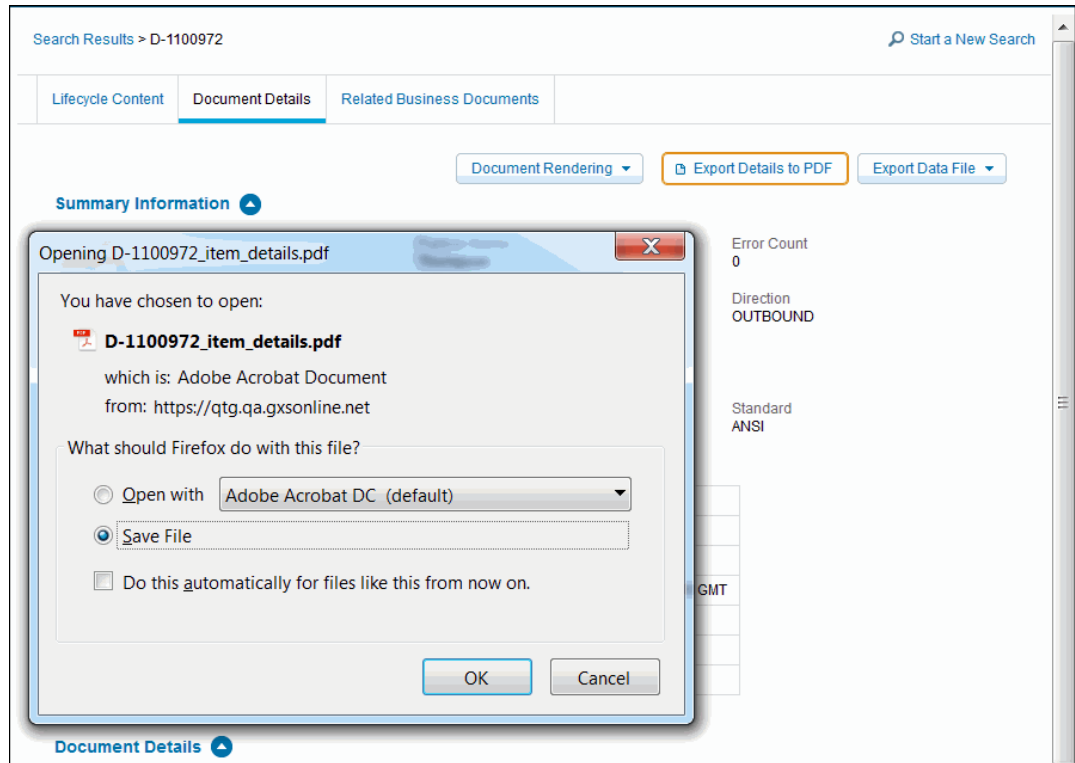
Document Details

3 Follow the prompt to open or save the file.



To export details to PDF

- 1 In the Summary Information section of the details page, click **Export Details to PDF**.
- 2 Follow the prompt to open or save the file.



View File and Document Heirarchies

To view the hierarchy of files and documents involved in a lifecycle

- 1 Click the **Lifecycle Content** tab on the Search Results page.

Search Results > D-1100972 Start a New Search

Lifecycle Content | Document Details | Related Business Documents

File (1) for D-1100972
Click on a row to list the content.

Settings | Export

GXS Ref No	Partner Name	Sender	Receiver	Direction	Application Reference	Sender Reference
F-5066979	Thompson	CIRCITY	THOMPSON	Outbound		000174858

- 2 Click the GXS Reference Number for the document or file to drill down for more detail.

Search Results > D-1100972 > ... Lifecycle Content: F-5066979 Start a New Search

Lifecycle Content | **File Details**

Export Details to PDF | Export Data File

Summary Information

Company CIRCITY's	Partner Name Thompson	Error Count 0
Sender CIRCITY	Receiver THOMPSON	Direction OUTBOUND
Sender Name Circuit&City' Address_testing	Receiver Name Thompson Address	
GXS Ref No F-5066979	Application Reference	Sender Reference 000174858

Document Details

Processing Steps (2) | Input & Output Files

Expand All | Collapse All

Status	Step	Activity	Start Date & Time	End Date & Time
✓ Completed	1	Enterprise Acceptance	Monday, October 17, 2016 05:30:04 GMT	Monday, October 17, 2016 05:30:04 GMT
✓ Completed	2	Enterprise Mailboxed	Monday, October 17, 2016 05:30:04 GMT	Monday, October 17, 2016 05:30:04 GMT

Audit Notes

3 To drill down further, click on an item in the row.

Document Details ⌵

Processing Steps (2) Input & Output Files

[Expand All](#) | [Collapse All](#)

Status	Step	Activity	Start Date & Time	End Date & Time	
✔ Completed	1 ⌵	Enterprise Acceptance	Managed Services Platform	Monday, October 17, 2016 05:30:04 GMT	Monday, October 17, 2016 05:30:04 GMT

Step Information

File Context Information

GXS Ref No: F-5066979 Est. File Size: 1024

Sender: CIRCITY

Receiver: THOMPSON

Sender Reference: 000174858

Application Reference:

Service Reference: 3685671004477477

✔ Completed	2 ⌵	Enterprise Mailboxed	Managed Services Platform	Monday, October 17, 2016 05:30:04 GMT	Monday, October 17, 2016 05:30:04 GMT
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Error Information

If the processing lifecycle contains error information, you can drill down to view information about the processing errors such as an invalid address, decryption error, etc.

To view process lifecycle error information

1 On the Processing Lifecycle page, click the details tab for the file, interchange, or document, for example, the **File Details** tab.

The Summary Information section displays the total number of errors.

Search Results > F-5067049 [Start a New Search](#)

[Lifecycle Content](#) | [File Details](#)

[Export Details to PDF](#)

Summary Information ⌵

Company CIRCITY's	Partner Name Thompson	Error Count 1 (View errors)
Sender CIRCITY	Receiver THOMPSON	Direction OUTBOUND
Sender Name Circuit&City Address_testing	Receiver Name Thompson Address	
GXS Ref No F-5067049	Application Reference BLANK	Sender Reference 1087248

- To view error information, click the **View Errors** in the Error Count section. The applicable error information displays.

Document Details						
Processing Steps (1)		Errors (1)		Input & Output Files		
Expand All Collapse All						
	GXS Ref No	System	Error Code	Error Status	Error Message	Tracking Date & Time
	F-5067049	ENTERPRISE	2	NEW	Invalid detail in the Data Field Element.	Monday, October 17, 2016 13:00:10 GMT

Status Alerts

If your company subscribes to the Status Alert Service, the Processing Lifecycle provides a Status Alerts summary. Status Alerts allow customers to optionally receive status alerts for their inbound and outbound transactions at different points, as the transactions are processed on the Active Documents platform and delivered to their Trading Partners.

Status alerts provide status information about transaction processing, including processing events that might require action. The alerts also communicate transaction events to your backend system and send email notifications about events that may require immediate attention or action.

Note: Status alerts are defined by the Community Administrator. If your company does not subscribe to this service but would like to, see your Community Administrator or OpenText Representative.

The Status Alerts summary links to details about the status alerts through your Active Documents Dashboard. The **Processing Lifecycle** page displays only the most recent report for a status type.

To view information about a status alert

- Click its link in the **Status File** column.

The **Status Alerts** section of the Processing Lifecycle provides the following information:

- The status of key events in transaction processing.
- Green icons indicate positive event statuses (events that occurred within the configured time period).
- Red icons indicate negative event statuses under two conditions:
 - An error event occurred.
 - A specific event did not occur within configured time period.

For example, a red icon for a mailbox event might indicate that the event was rejected, or it was not received before a specific period of time.

- The time of an event status update.
- A link to view details of the status alert.

Event Types

Depending on your implementation, possible Event Types might include the following:

Status	Description
accepted	The file was received by Active Documents from the trading partner's system. This is the starting point for all flows.
mailboxed	Active Documents mailboxed the translation output file for delivery to the trading partner. Not used if the translated status is in the same lifecycle.
tgmsmailboxed	The file was sent to the Trading Partner through Trading Grid Message Services (TGMS).
extracted	The Trading partner extracted the file from the mailbox or interconnect.
tgmsextracted	The file was received by the Trading Partner via Trading Grid Message Services (TGMS).
receivedbp	Received by my Partner. The file/document was delivered to the trading partner's destination.
receivedfp	The file was received from my Partner. The file/document was delivered to my destination.

Functional Acknowledgement Information

The Processing Lifecycle page might display Functional Acknowledgement (FA) information.

An Acknowledgment Code is from the functional acknowledgment (997 document or CONTRL message) that was reconciled with the document. There are seven possible acknowledgement codes:









- **A** — Accepted.
- **E** — Accepted with errors.
- **M** — Rejected. The message authentication code failed.
- **P** — Partially Accepted. At least one transaction set was rejected.
- **R** — Rejected.
- **W** — Rejected. Assurance failed validity tests.
- **X** — Rejected. The content after decryption could not be analyzed.

Managed Service Platform Data

Multiple Managed Service Platform entries might exist because transactions can pass through the Managed Service Platform at different stages of processing.

For example, the translated output entered another Managed Service routing cycle for transmission to the recipient.

Expand All | Collapse All

Activity	Step	Start Date & Time	End Date & Time	Status
Managed Services Platform	1  Translation	17/09/14 12:04:52 EDT	17/09/14 12:04:59 EDT	 Completed
Managed Services Platform	2  Enterprise Acceptance	17/09/14 12:05:01 EDT	17/09/14 12:05:01 EDT	 Completed
Managed Services Platform	3  Enterprise Extracted	17/09/14 12:05:01 EDT	17/09/14 12:05:01 EDT	 Completed
Managed Services Platform	4  Enterprise Acceptance	17/09/14 12:05:00 EDT	17/09/14 12:05:00 EDT	 Completed

TGMS Data

Trading Grid Messaging Service (TGMS) enables data exchange with your partners. It manages your inbound and outbound transactions.

As with Managed Services, multiple Trading Grid Messaging Service sections might exist because transactions can pass through TGMS, as well as Managed Services, at different stages of processing.

Other processing stages might also display, such as a Trading Grid Message Service Mailbag step, when a collection of files are going to a Trading Partner through a third party.

Communication Sections

A processing lifecycle might display different types of communication information.

Depending on your Trading Grid Online service communication setup, the Processing Lifecycle page might include sections that display data exchange information, including the following protocols or standards:

AS2	FTP/SFTP	SAP ALE
AS3	X.400	OFTP
IFTP	SMG	HTTPS
POP3	SMTP	

Similar to the Managed Service Platform and Trading Grid Messaging Service, the lifecycle might include multiple communication sections, depending on the processing that takes place.

Extended Event Data

Extended events are processing events that occur outside of OpenText and that your company publishes to OpenText. If you subscribe to the Extended Event service, the Processing Lifecycle page displays extended event data such as IDOC number, status information, and SAP Client identifier.

Translation Information

The Translation section for a Processing Lifecycle describes the translation input and output and includes both original and formatted input and output files (if available).

Activity	Step	Start Date & Time	End Date & Time	Status
Managed Services Platform	1 Enterprise Acceptance	01/10/14 10:26:14 EDT	01/10/14 10:26:14 EDT	Completed
Managed Services Platform	2 Translation	01/10/14 10:26:18 EDT	01/10/14 10:26:19 EDT	Completed
View Input & Output File(s)				
Step Information				
File Context Information				
GXS Ref No: F-4523434 File Size: 3072				
Sender: THOMPSON				
Receiver: CIRCITY				
Sender Reference: 999998888				
Application Reference: PURORD				
Service Reference: 3621162374130328				
Input Summary				
File Size: 2485 Instance: TGOAIBridge				
UDF File Count: 0 Session Number: 021453				
UDF Document Count: 0 Status: COMPLETED				
EDI File Count: 1				
Interchange Count: 1				
EDI Document Count: 1				
Output Summary				
UDF File Count: 0				
UDF Document Count: 0				
EDI File Count: 1				
Terminated File Count: 1				
Interchange Count: 1				
EDI Document Count: 1				
Managed Services Platform	3 Enterprise Extracted	01/10/14 10:26:19 EDT	01/10/14 10:26:19 EDT	Completed

If you received an error in this section:

- You can use the [“Active Documents Translation Errors”](#) for reference.
- For users subscribing to the Cloud Based Translations service, use these translation error descriptions and solutions for initial troubleshooting, as follows.
 - 1 Go to [Appendix C, “Active Documents Translation Errors”](#).
 - 2 Find the error number.
 - 3 Read the information regarding the potential cause of the error and the resolution for the error.

Related Documents

To view business documents related to the process lifecycle

- 1 On the Processing Lifecycle page, click the Related Business Documents tab. The Search Results page opens with a list of related documents.

Search Results > D-1100810 Start a New Search

Lifecycle Content | Document Details | **Related Business Documents**

83 Documents Found

Settings | Export | Items Per Page: 10 | 1 2 3 4 5 | 1 - 10 of 83 items

GXS Ref No	Partner Name	Sender	Receiver	Direction	Document Type	Primary Key	Tracking Date & Time
D-1100962	Thompson	ZZ:THOMPSON	ZZ:CIRCITY	Inbound	850	FTPSERVER	Friday, October 14, 2016 14:53:09 GMT
D-1100960	Thompson	ZZ:THOMPSON	ZZ:CIRCITY	Inbound	850	FTPSERVER	Friday, October 14, 2016 14:53:08 GMT
D-1100958	Thompson	ZZ:THOMPSON	ZZ:CIRCITY	Inbound	850	FTPSERVER	Friday, October 14, 2016 14:53:07 GMT

- 2 To view specific information, filter the list.

For example, to view a specific type of document, specify a document type such as **850**.

Audit Notes

You can view audit information, such as a record of email notifications, status updates, and other activity for the processing lifecycle.

To view audit notes for a lifecycle

- 1 Scroll down to the **Audit Notes** section.

A list of Audit messages and notes displays the following information:

- Type of entry (for example, Audit of an email notification, or Note generated by the system or a OpenText technician)
- Author of the entry
- Date the entry was created
- Details of the entry
- Whether or not a notification was sent.

Processing Lifecycle				
Audit Notes				
Type	Author	Created Date & Time	Details	Sent Notific <input type="button" value="Show All"/>
System	Notification Email	26/09/14 01:35:17 EDT	Notification Sent. Email sent to sreekanth.reddy@gxs.com	View
System	Notification Email	26/09/14 01:35:15 EDT	Notification Sent. Email sent to ADHC1@gxs.com	View
System	Notification Email	26/09/14 01:35:15 EDT	Notification Sent. Email sent to reena.samarth@gxs.com	View
System	Notification Email	26/09/14 01:35:15 EDT	Notification Sent. Email sent to ADHC1@gxs.com	View
System	OUTBOUND FG PROCESSING	26/09/14 01:37:28 EDT	FA Status Changed To Outstanding - New FG - None For Cycle 0	
System	FA-CYCLE-PROCESSING	26/09/14 02:00:41 EDT	Delinquent FA email notification sent to SURENDRA.MALREDDY@GXS.COM (PARTNER),sathish.chandra@gxs.com (EMAIL),SURENDRA.MALREDDY@GXS.COM (CLIENT),surendra.malreddy@gxs.com (CLIENT) for Cycle 1.	
System	FA CYCLE PROCESSING	26/09/14 02:00:41 EDT	FA Status Changed To Outstanding - Work Required - Delinquent Email Sent For Cycle 1	

2 To view an email notification such as confirmation that a file was sent, click the **View** link.

A copy of the email displays.

Business Document Viewer

The Business Document Viewer allows you view Electronic Data Interchange (EDI) files shared with Trading Partners in either HTML or PDF formats. You can view a document online, or download it directly to a PDF.

Supported Standards:

The Business Document Viewer supports the following EDI standards:

- ANSI
- TRADACOM
- EDIFACT

To display the Business Document Viewer

- 1 Search for a document. See ? ...
- 2 On the Search Results page, click the GXS Ref No for the document you wish to view.

The Process Lifecycle page displays the Document Details tab.

The screenshot shows the 'Document Details' tab for document D-1100818. It includes a 'Summary Information' section with fields for Company (CIRCITY's), Partner Name (Thompson), Error Count (0), Sender (ZZ:CIRCITY), Receiver (ZZ:THOMPSON), Direction (OUTBOUND), Sender Name (Circuit&City' Address_testing_QUAL), Receiver Name (Thompson Address), GXS Ref No (D-1100818), and Document Type (856). Below this is a 'Keys' table and an 'FA Received Status' table. The 'Document Details' section shows 'Processing Steps (2)' with a table of completed steps: Enterprise Acceptance and Enterprise Mailboxed.

Keys	Primary Key	FA Received Status
396*	10000001	Status: OUTSTANDING
337	20021212	Status Message: WORK REQUIRED
373	00	Status Details: DELINQUENT EMAIL SENT
		Status Date: Wednesday, September 28, 2016 06:00:55 GMT
		Cycle Number: 2
		Delinquency Indicator: Y
		Do Not Track Indicator: N

Status	Step	Activity	Start Date & Time	End Date & Time	
✓ Completed	1	Enterprise Acceptance	Managed Services Platform	Wednesday, September 28, 2016 05:30:06 GMT	Wednesday, September 28, 2016 05:30:06 GMT
✓ Completed	2	Enterprise Mailboxed	Managed Services Platform	Wednesday, September 28, 2016 05:30:06 GMT	Wednesday, September 28, 2016 05:30:06 GMT

3 Click Show Document Rendering.

This close-up shows the 'Document Rendering' button in the interface. A dropdown menu is open, displaying two options: 'Show Document Rendering' (highlighted in yellow) and 'Download Document Rendering'.

The Document Viewer (Business Mode) opens the document in it's original format.

Document Viewer (Business Mode)
Analyst Mode
Export to PDF

X12:856:004010

Beginning Segment for Ship Notice

Transaction Set Purpose Code: 00:Original
 Shipment Identification: 10000001
 Date: 20021212
 Time: 0000

Shipment

Hierarchical Level

Hierarchical ID Number: 1
 Hierarchical Level Code: S:Shipment

Carrier Details (Quantity and Weight)

Packaging Code: CTN
 Lading Quantity: 193
 Weight Qualifier: G:Gross Weight
 Weight: 7720
 Unit or Basis for Measurement Code: LB:Pound

Carrier Details (Routing Sequence/Transit Time)

Routing Sequence Code: B:Origin/Delivery Carrier (Any Mode)
 Identification Code Qualifier: 2:Standard Carrier Alpha Code (SCAC)
 Identification Code: CRPS
 Transportation Method/Type Code: E:Expedited Truck

Reference Identification

Bill of Lading Number: 418493375
 Carrier's Reference Number (PRO/Invoice): 11251124

Date/Time Reference

Shipped: 20021212

Ship To

Name: Best Buy Distribution Center #717
 Assigned by Buyer or Buyer's Agent: 0010008570

Ship From

Name: Hewlett Packard

Order

Hierarchical Level

Hierarchical ID Number: 2
 Hierarchical Parent ID Number: 1
 Hierarchical Level Code: O:Order

Purchase Order Reference

Purchase Order Number: 62636
 Date: 20021204

Note: You might not see a document if it does not meet one of the supported standards. If the file is not available, an error message displays.

OPENTEXT™ Active Documents
Logged in as: Susana.Vazquez@pris.com
Thursday, September 29, 2016 14:12:39 EDT

Dashboard Search Saved Searches
Start a New Search

Recent Searches Search Results • D-40053475206

Browsing History

D-40053665206
D-40053475206

Clear All

Failed to download. Sorry this file is not available.

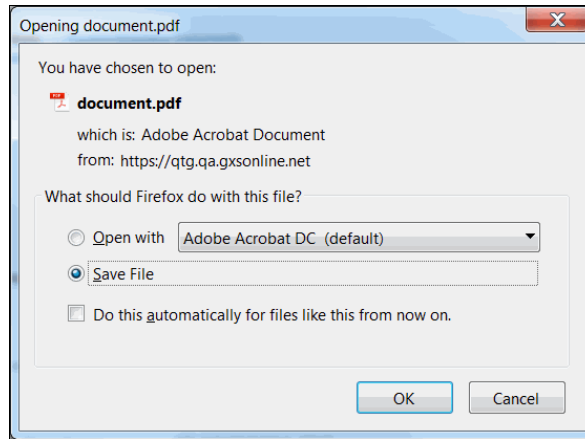
Lifecycle Content Document Details Related Business Documents

Summary information

Company: SCB N14-CO-OC00116535M1
 Partner Name: SCB N14-CO-OC00116 536M1
 Error Count: 0

Document Rendering
Export Details to PDF

- To save the document as a PDF, click **Export to PDF**, and follow the prompt to open or save the file.



Document Viewer Analyst Mode

To view the document in analyst mode and see the report structure, click **Analyst Mode**.

Document Viewer (Analyst Mode)

Business Mode
Export to PDF

X12:856:004010

Interchange Control Header (ISA)

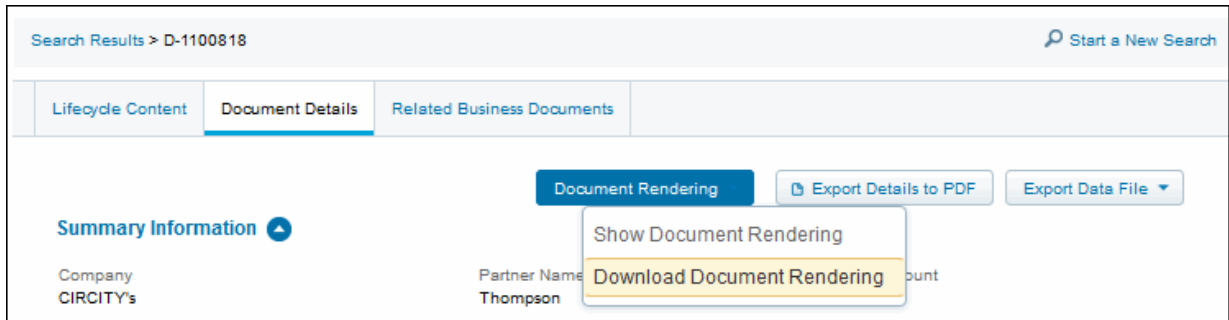
- Authorization Information Qualifier (ISA01): '00'
- Authorization Information (ISA02): ''
- Security Information Qualifier (ISA03): '00'
- Security Information (ISA04): ''
- Interchange ID Qualifier (ISA05): 'ZZ'
- Interchange Sender ID (ISA06): 'CIRCITY'
- Interchange ID Qualifier (ISA07): 'ZZ'
- Interchange Receiver ID (ISA08): 'THOMPSON'
- Interchange Date (ISA09): '160928'
- Interchange Time (ISA10): '0530'
- Repetition Separator (ISA11): 'X'
- Interchange Control Version Number (ISA12): '00200'
- Interchange Control Number (ISA13): '000174785'
- Acknowledgment Requested (ISA14): '0'
- Test Indicator (ISA15): 'P'
- Component Element Separator (ISA16): '~'

Functional Group Header (GS)

- Functional Identifier Code (GS01): 'SH'
- Application Sender's Code (GS02): 'T300'
- Application Receiver's Code (GS03): 'P100'
- Date (GS04): '20160928'
- Time (GS05): '0530'
- Group Control Number (GS06): '62674'

To Download Rendered Documents Directly to PDF

- 1 In the Process Lifecycle page, click **Document Rendering**.



- 2 Click **Download Document Rendering**.
- 3 Follow the prompt to open or save the PDF.

Reports

Active Documents provides traditional document tracking reports, based on your search criteria.

You can generate these reports on demand or schedule them.

Schedule a Report

Reports are created from saved searches.

- 1 If necessary,
 - a Click the **Active Documents** tab.
 - b Search for the transactions you want to report on. See "[Search for Transactions.](#)"
 - c Save the search. See "[Save Search Criteria.](#)"
- 2 Click the **Saved Searches** tab.
- 3 Click the clock icon.
- 4 In the dialog box, select the **Report Format**.
- 5 Click **Frequency > Search Frequency**, and select when you want to run the report. To run a one-time report, select **Now**.
- 6 If you want the report
 - Emailed to yourself and other contacts, click **Email Report** and select the applicable people.
 - Sent via a platform, e.g., Enterprise, click **Send Report via Platform** and provide the applicable data. Active Documents sends the report to a mailbox on a platform enterprise machine. Either of the following is possible:
 - Users with access can access the machine by FTP and download the report.

- The mailbox can forward the report to another machine or service that makes it available to users.
- 7 Click **Save**.
The system adds the schedule to the Scheduled Reports list. If you selected a **Frequency** of **Now**, the system generates this as a one-time report.
 - 8 To see your scheduled report, click the **Trading Grid** tab > **Reports** tab > **Scheduled Reports**.

View Scheduled Reports

To view a scheduled reports list

- 1 If you are currently in Active Documents, click the **Trading Grid** tab.
- 2 Click the **Reports** tab > **Scheduled Reports**.
The Scheduled Reports page opens.

Reports						?	⊞
Scheduled Reports							
View : All reports							
<input type="checkbox"/>	Report Name ↕	Schedule ↕	Report Format	Delivered	Created By ↕	Execute Once	
<input type="checkbox"/>	30 day both directions	MONTHLY, on 1st, 01:00 AM GMT	CSV	Online Only	Kit Ellis	<input type="button" value="Execute"/>	
<input type="checkbox"/>	30 day search both directions	WEEKLY, Thursday, 07:00 AM GMT	CSV	Online Only	Kit Ellis	<input type="button" value="Execute"/>	
<input type="checkbox"/>	AS2 Error Report	WEEKLY, Monday, 06:00 AM GMT	CSV	Email	Mark Logan	<input type="button" value="Execute"/>	
<input type="checkbox"/>	ASN	MONTHLY, on 1st, 05:00 AM GMT	CSV	Email	Bob Dileo	<input type="button" value="Execute"/>	
<input type="checkbox"/>	ASN	ONCE, 06 Jan 2012, 06:34 PM GMT	CSV	Email	Bob Dileo		
« Previous 5 Displaying Records 1 to 5 of 50 Next 5 » View 5 items per page							
<input type="button" value="Delete"/>							

To view the current schedule for a report, in the **Report Name** column, click the applicable report name.

Note: If the **Report Name** is not a hyperlink, the report is a one-time report previously executed.

Change/Generate/Delete a Report Schedule

To change a report schedule

- 1 Click **Scheduled Reports**.
- 2 In the **Report Name** column, click the applicable report name.
- 3 In the Save or Schedule dialog that opens, view or change information.
- 4 Click **Save**.

To immediately generate a scheduled report

- 1 Click **Scheduled Reports**.
- 2 Find the applicable report in the list.
- 3 In the **Execute Once** column, click **Execute** for the report.

The system adds a one-time report to the Scheduled Reports list with the same name, along with ONCE and the current date and time.

Note: Many users delete one-time reports. Select the report check box, then click **Delete**.

4 Click **Delivered Reports** to view the report.

To delete scheduled reports

- 1 Click **Scheduled Reports**.
- 2 In the View drop-down list at top, click **Only my reports**. The list refreshes.
- 3 Click the check box(es) in the row of the scheduled report(s) to delete.
- 4 Click **Delete**.

Delivered Reports

Delivered Reports are Scheduled Reports, including one-time reports, generated by the system.

To view a list of delivered reports

- 1 If you are currently in Active Documents, click the **Trading Grid** tab.
- 2 Click the **Reports** tab > **Delivered Reports**.
 The Delivered Reports page opens.

Report Name	Report Format	Report Date & Time	User	Status
ASN	CSV	Friday, January 06, 2012 18:34:21 GMT	Bob Dileo	Processing
iFTP search chubachi	PDF	Friday, January 06, 2012 16:00:27 GMT	Hiroyuki Chubachi	Processing
Group by with 3404533 and 850	CSV	Friday, January 06, 2012 15:30:22 GMT	Kit Ellis	New
revert_test	CSV	Friday, January 06, 2012 11:30:38 GMT	Mark Logan	Processing
revert_test	PDF	Friday, January 06, 2012 11:30:37 GMT	Mark Logan	Processing

« Previous 5 Displaying Records 1 to 5 of 631 Next 5 » View 5 items per page

On the Delivered Reports page,

The list shows the following for each generated report.

- Name of the report (click the name link to open the report)
- Report format (for example, PDF)
- Date and time the report was generated
- Name of user who created/scheduled the report
- Report status, such as **New**, **Read**, **Processing**, or **Failed**
- Report ID (click link to view audit log for the report)

Download Reports

To download reports

- 1 In the **Delivered Reports** list, find the row containing the latest version of this report.
- 2 In the **Report Name** column, click the name of the report. (The status cannot be **Processing**.)
- 3 Follow the prompts to open (or save) the report.

View Audit Logs

To view the Audit Logs

An audit log for a delivered report includes information such as who received the report and when. A log is available only if Active Documents emails the report to recipients.

- 1 In the **Delivered Reports** list, find the row containing the latest version of this report.
- 2 In the **Report ID** column, click the link for the report. A dialog displays audit information, such as who received the report.

Audit Log for report 'Temp_Report' - 10/01/2013 01:14:38 GMT - 503074						
Audit Date & Time (GMT)	Audit Item	Recipient	Sender	Application Ref	Status	Additional Information
2013-10-01 01:17:54.0	Email Delivery	thrayambaka.chitukula@gxs.com			SENT	
2013-10-01 01:17:58.0	Email Delivery	surendra.malreddy@gxs.com			SENT	
2013-10-01 01:18:03.0	Email Delivery	sreekanth.reddy@gxs.com			SENT	
2013-10-01 01:18:11.0	Email Delivery	surendracompuser@gmail.com			SENT	
2013-10-01 01:18:24.0	Email Delivery	ys_reddy2000@yahoo.com			SENT	
2013-10-01 01:18:24.0	Email Delivery	Susana.Vazquez@gxs.com			SENT	

Delivered Reports Retention Period

Active Documents deletes delivered reports after 45 days.

Delete Delivered Reports

To delete a delivered report

Delete delivered reports from the **Scheduled Reports** list. See ["To delete scheduled reports"](#) on page 82.

Reports for Trading Grid Messaging Service

7

The Reports component is an online reporting tool that provides up-to-date information about your transactions.









Note: The types of reports you can view are based on your subscription and your role. Depending on your company's subscription agreement and the permissions assigned to your role, you might not see all reports listed in this chapter.

Topics include:

- [“Tips for Viewing Reports” on page 86](#)
- [“TGMS Reports” on page 86](#)
 - [“Transaction Summary Report” on page 87](#)
View an up-to-date informational snapshot of your sent and received information.
 - [“About Status Reports and Billable Reports” on page 88](#)
See sent, received, and rejected interchanges and find the cause of any rejected items. Some reports are billable based on the quantity of data.
 - [“Trading Partnership Transaction Report” on page 92](#)
List of interchanges sent and received to/from your trading partners.
 - [“Inbound Reactivate Report” on page 92](#)
Reactivate an interchange.
 - [“About Transaction Alert Logs” on page 93](#)
List of notifications that you received.
- [“Functional Acknowledgement Management \(FAM\)” on page 98](#)
 - [“All Tracked Trading Partners Report” on page 98](#)
Provides an overview of your community's performance for the current month.
 - [“Compliant Trading Partners” on page 100](#)
Lists trading partners that responded to all documents on time.
 - [“Late Trading Partners Report” on page 100](#)
Lists trading partners that responded after the policy time period expired.
 - [“No Acknowledgement Trading Partners Report” on page 101](#)
Lists trading partners that have not yet responded to all documents and the policy time period has expired.
 - [“Excluded from Tracking Report” on page 102](#)
Lists trading partners whose documents are excluded from tracking.
- [“Functional Acknowledgement Scorecard \(FAS\)” on page 106](#)

Tips for Viewing Reports

Below are tips for accessing and viewing most Trading Grid reports.

- To access your reports, from any page in the Trading Grid, click the **Reports** tab. Use the links on the left side of the page to access the report you want.
- To print a printable report, at the top of the report, click  **Print**.
- To download a report, at the top of the report, click:
 -  **CSV** to download the data into an Excel spreadsheet, or
 -  **Save** to save and download the report into a text file.
- For all Trading Grid reports, do some or all of the following.
 - Collapse the report by clicking  **Collapse** that precedes the report title of the listing. To expand the report, click  **Expand**.
 - Expand the content area by eliminating the left panel. At the top of the left panel, click  **Hide**. To restore the left panel, click  **Display** that precedes the report title line.
 - By default, most report listings are sorted, in ascending order, by ILOG number. You can resort the listing by another sortable column, in either ascending or descending order. A sortable column is designated by a  **Down** arrow after the column name. Click the **Down** arrow once to sort in ascending order; click it again to sort in descending order.

Define the number of interchanges that appear in each page of the list. Select the number from the **View** drop-down menu.

TGMS Reports

The Trading Grid Message Service reports are:

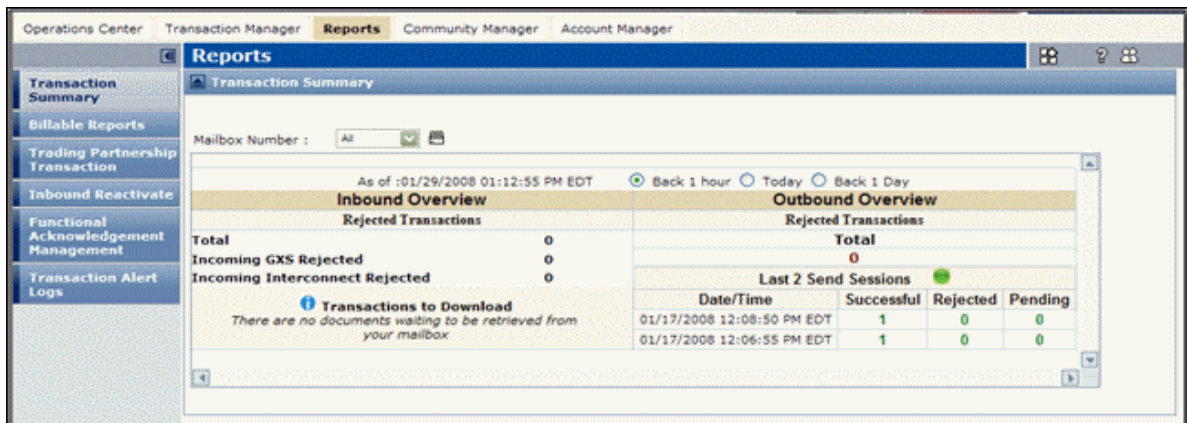
- [“Transaction Summary Report” on page 87](#)
View an up-to-date informational snapshot of your sent and received information.
- [“About Status Reports and Billable Reports” on page 88](#)
See sent, received, and rejected interchanges and find the cause of any rejected items. Some reports are billable based on the quantity of data.
- [“Trading Partnership Transaction Report” on page 92](#)
List of interchanges sent and received to/from your trading partners.
- [“Inbound Reactivate Report” on page 92](#)
Reactivate an interchange.
- [“About Transaction Alert Logs” on page 93](#)
List of notifications that you received.

Transaction Summary Report

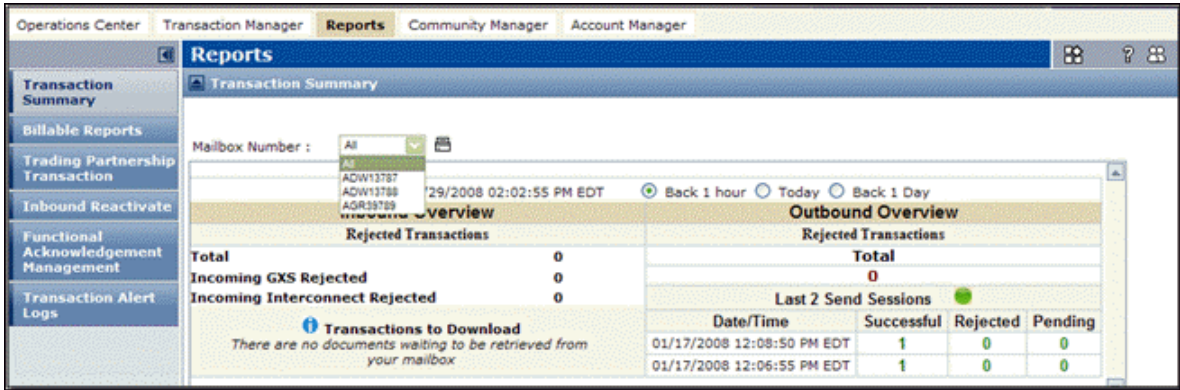
The Transaction Summary provides an up-to-date, snapshot of sent and received data. Trading Grid displays the information in real-time. Real-time means each time you send or receive a document, it is instantly reflected in the Transaction Summary report.

For sent and received documents, view the following information for the selected time period. You can select on one of these time periods.

Report section	Description
Time period	<ul style="list-style-type: none"> ■ Back 1 Hour — From one hour earlier until the current time. ■ Today — From 12 a.m. of the current day until the current time. ■ Back 1 Day — From 12 a.m. of the previous day until the current time.
Inbound Overview	<ul style="list-style-type: none"> ■ Incoming Interconnect Rejected — Number of documents sent from a Third Party network. ■ Incoming OpenText Rejected — Number of documents sent from the OpenText network that OpenText refused. ■ Transactions to Download — Number of documents in your mailbox that you have not downloaded yet.
Outbound Overview	<ul style="list-style-type: none"> ■ Rejected transactions — Number of documents OpenText rejected and did not send. ■ Last 2 Send Sessions — Date/Time of the most and next-most recent send session. For each session, displays the number of documents <ul style="list-style-type: none"> ■ That were Successfully sent. ■ That OpenText refused to send (Rejected) due to errors. ■ In a "holding area" (Pending) waiting for OpenText to send.



View transactions by selecting one or **All** mailboxes.



About Status Reports and Billable Reports

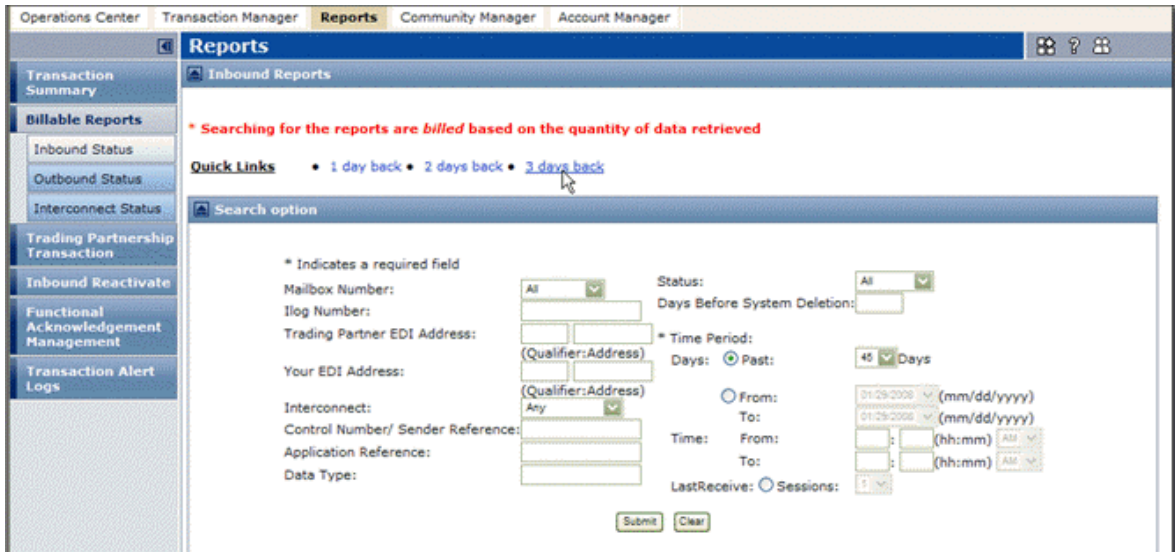
Based on your company's subscription, you see either **Status Reports** or **Billable Reports** on the left side of a Reports page.

These reports provide the details summarized in your Transaction Summary report and include these reports:

- "Inbound Status Report" on page 89
- "Outbound Status Report" on page 90
- "Interconnect Status Report" on page 91
- "Delivered and Scheduled Reports" on page 92

Important: For **Billable Reports**, your company is billed based on the quantity of data returned in a report. For **Status Reports**, your company is not charged because the reports are included in your company's subscription.

Whichever report you select, a search page opens.



You can use two methods to search.

- On the **Quick Links** line, click one of the options.

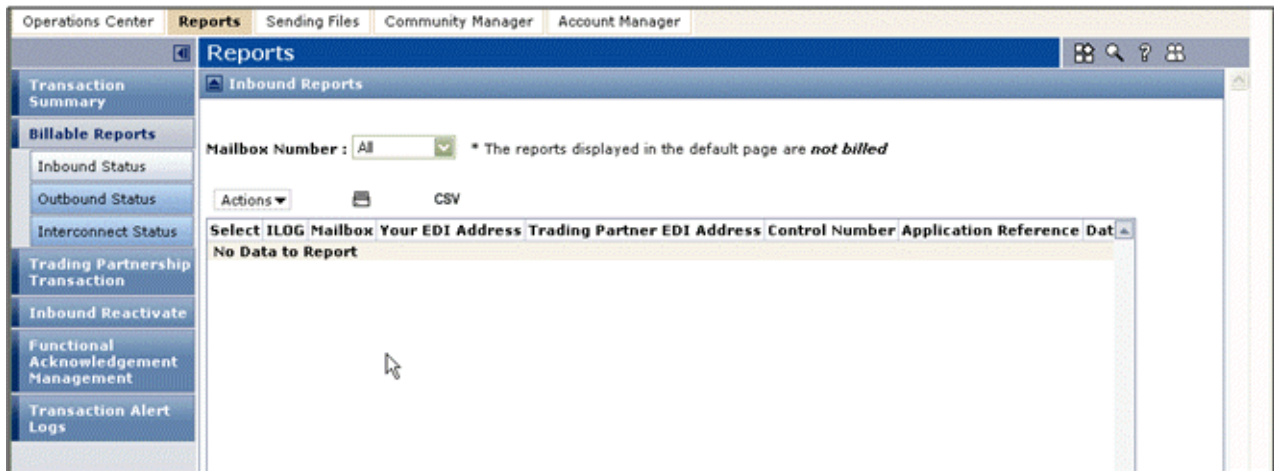
- In the **Search option** area, enter your search criteria, and click **Submit**.
 For information about search fields, see [“TGMS Report Columns”](#) on page 96.

Inbound Status Report

The Inbound Status report shows all documents received. It includes identifying information for each document. This report displays information on all interchanges sent to you during up to the previous 45 days. The report defaults to interchanges received within the past 24 hours.

The Inbound Status report lets you

- See when or if you received an interchange from your partner.
- Ensure you have successfully retrieved all interchanges that were waiting for you.
- Investigate rejected interchanges.



Note: For information about the report columns, see [“TGMS Report Columns”](#) on page 96.

Use this procedure to reactivate an interchange that you downloaded so you can “re-receive” it.

To reactivate an interchange from the Inbound Status Report

- 1 Click the **Reports** tab > **Inbound Status**.
- 2 In the **Select** column, select the interchange(s) to re-activate.

Note: You can re-activate interchanges with an **Opened** status.

3 Click **Actions** > **Reactivate**.

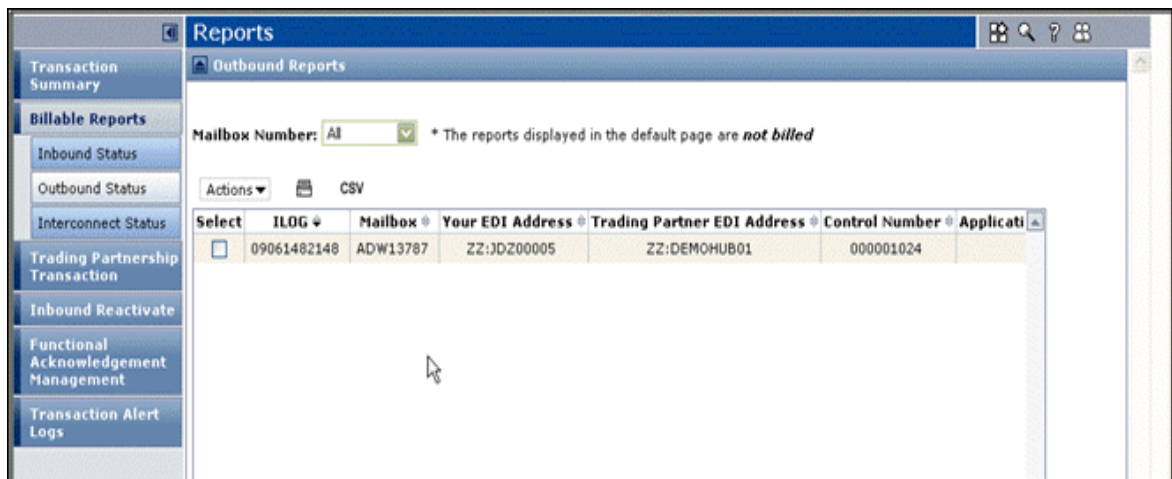


See also:

- ["Configure TGMS Report Data" on page 97](#)
- ["Tips for Viewing Reports" on page 86](#)

Outbound Status Report

The Outbound Status report displays identifying information for each document that you sent, including error conditions for rejected transactions. This report can display information about all interchanges sent up to nine days in the past. The report defaults to interchanges sent within the last 24 hours.



Note: For information about the report columns, see ["TGMS Report Columns" on page 96](#).

Use this procedure to resubmit an interchange.

To resubmit an interchange from the Outbound Status Report

- 1 Click the **Reports** tab > **Outbound Status**.
- 2 In the **Select** column, select the interchange(s) to resubmit.
- 3 Click **Actions** > **Resend**.

A confirmation page opens. It specifies if the resubmit(s) were successful. It also specifies the new ILOG number(s).

See also

- [“Configure TGMS Report Data” on page 97](#)
- [“Tips for Viewing Reports” on page 86](#)

Interconnect Status Report

While the Interconnect Status report is similar to the Inbound Status report, it displays interchanges received using a network other than the OpenText network, called an interconnect. The report defaults to interchanges received within the last 24 hours.

The Interconnect Status report lets you:

- See when or if you received an interchange from your partner.
- Investigate rejected interchanges. Occasionally, a trading partner on an Interconnect sends a document to you, but the OpenText network rejects the interchange. It could be rejected for multiple reasons, for example, an invalid relationship. When an interchange is rejected it is not delivered to your mailbox.

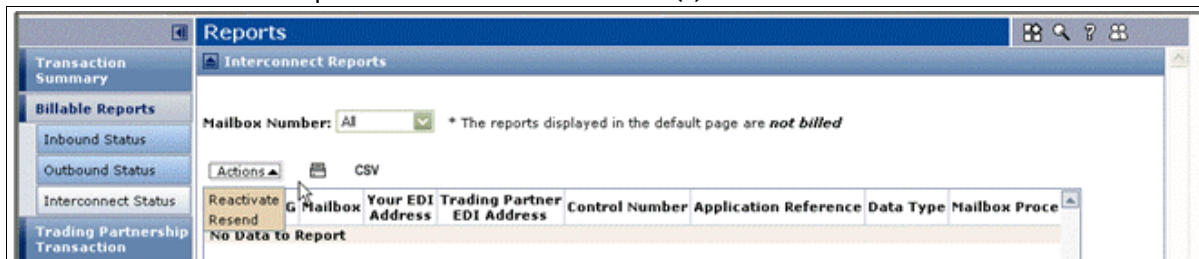
From this report, you can:

- Re-receive (**Reactivate**) an interchange that you already downloaded to your desktop.
- **Resend** (resubmit) any interchange. For example, if an Interconnect user sends data and the Trading Grid rejects it because of an error, such as a pending trading relationship, you can tell the Trading Grid to resend the data after the trading relationship is confirmed. which eliminates the need of making the Interconnect user resend it.

To reactivate an interchange from the Inbound Reactivate Report

- 1 Click the **Reports** tab > **Interconnect Status**.
- 2 In the **Select** column, select the interchange(s) you want.
- 3 Click **Actions** > **Reactivate** or **Resend**.

A confirmation page opens. The page specifies if the resubmit(s) were successful. It also specifies the new ILOG number(s).



Note: For information about the report columns, see [“TGMS Report Columns” on page 96](#).

See also

- [“Configure TGMS Report Data” on page 97](#)
- [“Tips for Viewing Reports” on page 86](#)

Delivered and Scheduled Reports

If your company decided to compile reports in the background and make them available when completed, you see the **Delivered Reports** link under the **Billable or Status Reports** section.

This option is for large companies with large volumes of data.

Trading Partnership Transaction Report

This report summarizes the transactions and sent and received interchanges between you and your trading partners. For each partner, the report lists each transaction, its description, and its number of KCs.

Note: This report is for the previous month. For example, if the current month is November, the report lists the transactions and interchanges for October.

Operations Center | Transaction Manager | **Reports** | Community Manager | Account Manager

Reports

Transaction Summary

Billable Reports

Trading Partnership Transaction

Inbound Reactivate

Functional Acknowledgement Management

Transaction Alert Logs

Mailbox Number: ADW13788

Totals

Transaction Code	Description	Quantity
238	MAILBOX FEE, PER USER#, PER MONTH	1.00
241	MANAGEMENT REPORT, ELECTRONIC FORMAT	2.80
242	TRADING PAIR TRANSACTION DETAIL REPORT	1.00
406	TWO ALERTS (MAILBOX ERROR AND ARRIVAL ALE	1.00
385	INACTIVITY ALERT	1.00
406	EA MANAGEMENT PER USER MONTHLY FEE	1.00

User Address : ZZ:JDZ00005
Partner's Address : ZZ:ANTPAYNE
Company name : ANTHONY PAYNE

Transaction Code	Description	Quantity
203	INTERCHANGES SENT	2.00
204	KC'S (1000 CHARACTERS)	41.10
350	KC'S OVER 40 KC (1000 CHARACTERS)	547.30

Partner's Address : ZZ:GSSEMEA
Company name : GSS EMEA

Transaction Code	Description	Quantity
203	INTERCHANGES SENT	1.00
204	KC'S (1000 CHARACTERS)	1.10

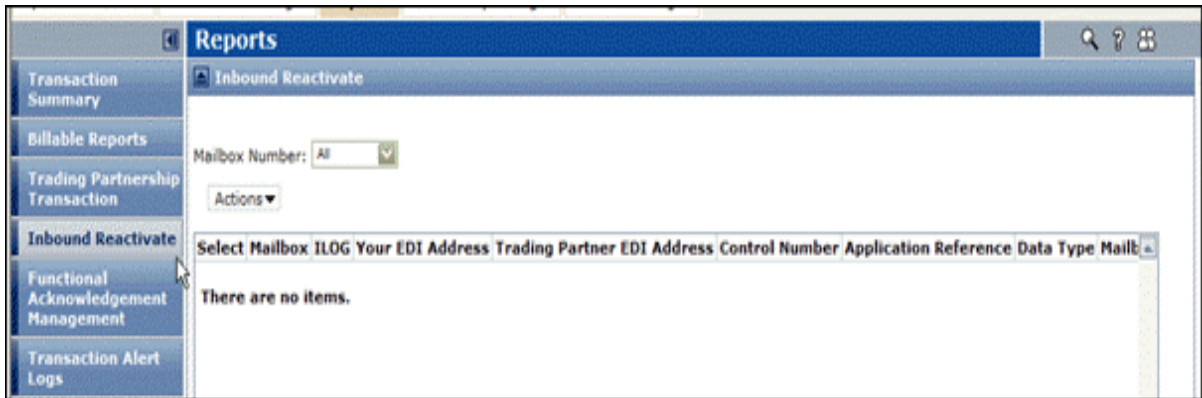
See also

- ["Tips for Viewing Reports" on page 86](#)

Inbound Reactivate Report

The Inbound Reactivate report displays information about all interchanges sent to you that are eligible for "reactivation," that is, interchanges you have opened for up to the previous 45 days. The report defaults to interchanges received and opened within the last 24 hours.

This report lets you reactivate the interchange so that you can “re-receive” it.



In addition, you can reactivate an interchange that you already downloaded to your desktop so you can “re-receive” it.

To reactivate an interchange using the Inbound Reactivate Report

- 1 Click the **Reports** tab > **Inbound Reactivate**.
- 2 In the **Select** column, select the interchange(s).
- 3 Click **Actions** > **Reactivate**.

A confirmation page opens. It specifies if the reactivation(s) were successful.

See also

- [“TGMS Report Columns” on page 96](#) for information about the report columns.
- [“Tips for Viewing Reports” on page 86](#)

About Transaction Alert Logs

Depending on your company subscriptions, you see a list of notifications that you received. On the left side of the page, click an action to see a list of notifications.

Notifications include:

- [“Mailbox Arrival Report” on page 94](#)
- [“Mailbox Error Report” on page 94](#)
- [“Mailbox Inactivity Report” on page 95](#)
- [“Functional Acknowledgement Delinquency Report” on page 95](#)
- [“Interchange Exceptions Report” on page 95](#)

Mailbox Arrival Report

The Mailbox Arrival report lists all documents that arrived in your mailbox.

The screenshot shows the 'Report : Transaction Alert' window with the 'Arrival Alerts' sub-report selected. The 'Mailbox Number' is set to 'ADW13787'. The report displays a table of arrival alerts with the following columns: Mailbox, Alert Date, Sent to, Interchange Control Number, ILog, Receiver Id, and Sender Id.

Mailbox	Alert Date	Sent to	Interchange Control Number	ILog	Receiver Id	Sender Id
ADW13787	02/20/2008 17:12:36 EST	jmmtap@hotmail.com	000001001	02202220570	ZZ:JDZ00005	ZZ:JDZHTTFS
ADW13787	02/20/2008 17:12:36 EST	justindz@gmail.com	000001001	02202220570	ZZ:JDZ00005	ZZ:JDZHTTFS
ADW13787	01/10/2007 10:15:54 EST	justindz@gmail.com	000001015	01101495253	ZZ:JDZ00005	ZZ:DEMOHUB01
ADW13787	01/10/2007 10:15:54 EST	justindz@gmail.com	000001015	01101495253	ZZ:JDZ00005	ZZ:DEMOHUB01
ADW13787	01/10/2007 10:15:54 EST	jmmtap@hotmail.com	000001015	01101495253	ZZ:JDZ00005	ZZ:DEMOHUB01
ADW13787	11/27/2006 15:13:05 EST	justindz@gmail.com	000001014	11272020991	ZZ:JDZ00005	ZZ:DEMOHUB01
ADW13787	11/27/2006 15:13:05 EST	justindz@gmail.com	000001014	11272020991	ZZ:JDZ00005	ZZ:DEMOHUB01

Navigation: < Previous 10 Items 1 to 10 of 52 Next 10 > View 10 items per page

Mailbox Error Report

The Mailbox Error report lists all documents that could not be delivered to your trading partner due to a processing error, including the error code and description.

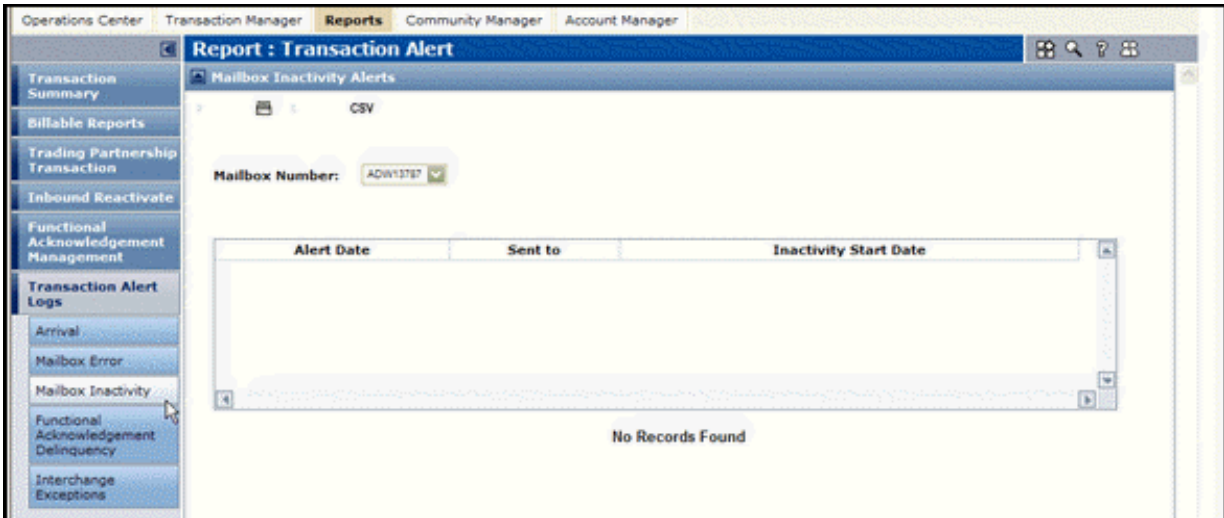
The screenshot shows the 'Report : Transaction Alert' window with the 'Mailbox Error Alerts' sub-report selected. The 'Mailbox Number' is set to 'ADW13787'. The report displays a table of mailbox error alerts with the following columns: Mailbox, Alert Date, Sent to, Error Code, and Error Description.

Mailbox	Alert Date	Sent to	Error Code	Error Description
ADW13787	08/09/2006 09:19:28 EDT	justindz@gmail.com	0100	Unrecognized error returned from Enterprise. The error
ADW13787	08/09/2006 09:19:28 EDT	justindz@gmail.com	0100	Unrecognized error returned from Enterprise. The error
ADW13787	08/07/2006 11:39:06 EDT	justindz@gmail.com	0002	There are no bilateral trading relationships for this send
ADW13787	08/07/2006 11:39:06 EDT	justindz@gmail.com	0002	There are no bilateral trading relationships for this send
ADW13787	08/07/2006 11:15:16 EDT	justindz@gmail.com	0002	There are no bilateral trading relationships for this send
ADW13787	08/07/2006 11:15:16 EDT	justindz@gmail.com	0002	There are no bilateral trading relationships for this send
ADW13787	07/13/2006 10:09:18 EDT	justindz@gmail.com	0100	Unrecognized error returned from Enterprise. The error

Navigation: < Previous 10 Items 1 to 10 of 10 Next 10 > View 10 items per page

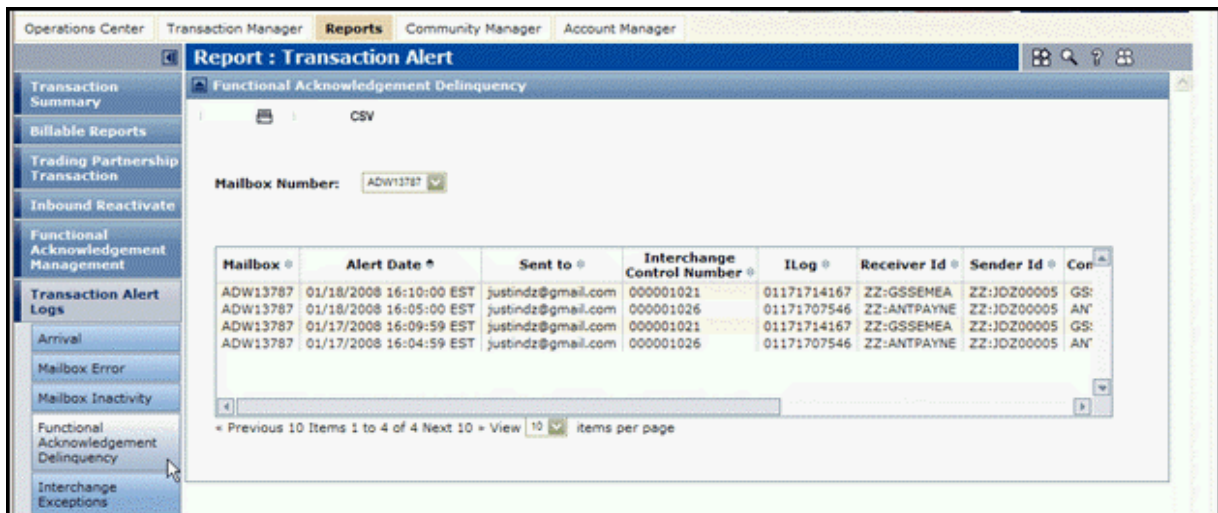
Mailbox Inactivity Report

The Mailbox Activity report lists all mailboxes that have been inactive for a previously specified time period.



Functional Acknowledgement Delinquency Report

The Functional Acknowledgement Delinquency report lists all late functional acknowledgement documents.



Interchange Exceptions Report

The Interchange Exceptions report lists all **noncompliant** interchanges; that is, documents that are not in compliance with the ANSI X12 standard due to an error. The report includes the error description.

TGMS Report Columns

For each report, the list shows the following information:

Note: If you do not see all columns described, you might need to re-configure the listing to display them (see [“Configure TGMS Report Data”](#) on page 97).

TGMS Report Column	Description
ILOG	Input Log Number, assigned by the Trading Grid for tracking purposes. A log number assigned by Interchange Services for tracking purposes. An ILOG is an 11-digit number, based on the combination of the month, day, Greenwich Mean Time, and the decimal fraction of the hour.
Mailbox	Mailbox the interchange was sent to (for Inbound Status) or from (for Outbound Status).
Your EDI Address, Trading Partner EDI Address	The EDI addresses of you and your trading partner.
Interconnect	If data came from, or is going to, another network, this is the network (VAN) name.
Control Number	Interchange Control Number of the data coming in (for Inbound Status) or going out (for Outbound Status).
Application Reference	The type of data that is contained in the file, for example, 850.
Data Type	The application reference document type.
Mailbox Process Date/Time	When the interchange was available for pickup from the mailbox.
OpenText Receipt Date/Time	When OpenText received the interchange.
Receiver Pickup Date/Time	When the receiver picked up the interchange from the mailbox.
Status	Current status of the interchange. Click the Status to see interchange details.

Status values include:

Status	Type	Description
Mailboxed	Outbound	Interchange document was delivered to your trading partner's mailbox or the appropriate Interconnect and is ready to be picked up.
Opened	Inbound	Interchange documents were downloaded from the mailbox to the receiver's PC.
Picked Up	Outbound	Trading partner or the appropriate interconnect has picked up the interchange document.
Rejected	All	Interchange was rejected by OpenText.
Unopened	Inbound	Interchange documents were not yet downloaded from the mailbox to the receiver's PC.


- **Days before System Deletion** — Interchanges are kept for the retention period your company specifies. This column displays the number of days before

Trading Grid deletes the interchange from the system. After it has been deleted, you cannot access or retrieve it. where does this go?

Configure TGMS Report Data

You can change the layout and the contents displayed on some report pages. Or, you can copy the Transaction Summary report to your Operations Center home page.

To configure report data

- 1 Click the **Reports** tab, then open the report to configure.
- 2 To configure the current page, in the Reports title line, click  **Configure**.
- 3 Depending on the available options, do one or more of the following:

To ...	Do this ...
Copy the Transaction Summary to the Operations Center page	Select Copy to Ops Center .
Hide a listing on the page	Select Minimize for the applicable component. Note: After a component is minimized, click Expand to view its content.
Rearrange the columns for a listing	In the Order column, enter the column order sequence you want.
Eliminate one or more columns from view	In the Hide column, select the columns you do not want to see.
Change the default sort sequence for a listing	In the Sort column, select the column by which you want the data sorted.
Select the number of transactions on a page	In the Lot Size field, type a value.
Select a time zone for report information on these reports. Inbound Status Outbound Status Interconnect Status	<ol style="list-style-type: none"> 1 From the Default Mailbox list, select the mailbox or ALL. 2 From Default report name Time Zone, select <ul style="list-style-type: none"> ■ Mailbox Time Zone — To use the default time zone of the mailbox(es). ■ GMT — To use Greenwich Mean Time. ■ My Time Zone — To use your default time zone.

- 4 Click **Apply**.

Trading Grid re-configures the page according to your specifications.

Functional Acknowledgement Management (FAM)

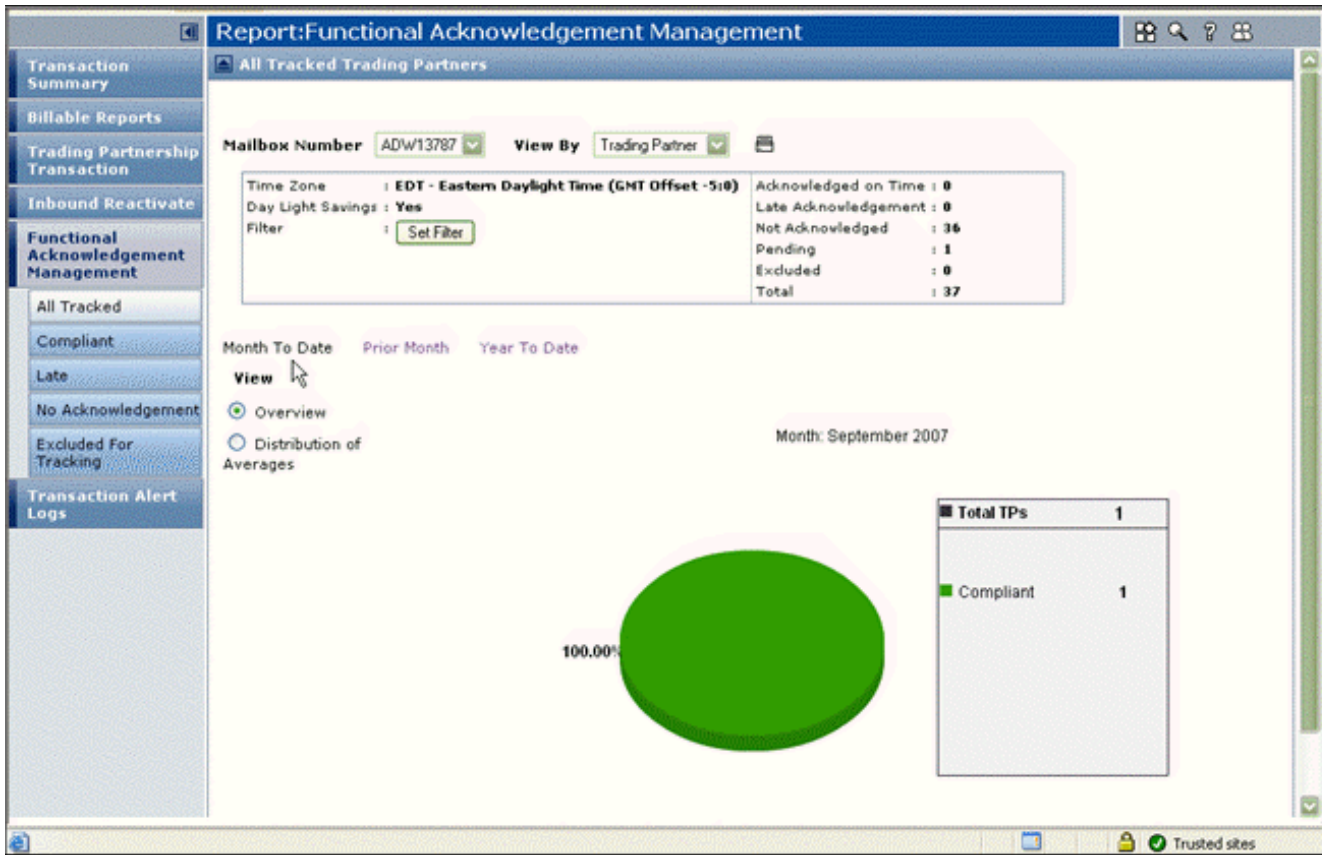
The Functional Acknowledgement service provides a series of reports. These reports provide a comprehensive look at community performance for the current month, prior month, and year-to-date (for Buyers and Retailers). Reports include

- [“All Tracked Trading Partners Report” on page 98](#)
Provides an overview of your community’s performance for the current month.
- [“Compliant Trading Partners” on page 100](#)
Lists trading partners that responded to all documents on time.
- [“Late Trading Partners Report” on page 100](#)
Lists trading partners that responded after the policy time period expired.
- [“No Acknowledgement Trading Partners Report” on page 101](#)
Lists trading partners that have not yet responded to all documents and the policy time period has expired.
- [“Excluded from Tracking Report” on page 102](#)
Lists trading partners whose documents are excluded from tracking.

All Tracked Trading Partners Report

The All Tracked Trading Partners report provides an overview of your community’s performance for the current month. Statistics at the top show the number of documents in each category.

Report Field	Description
Acknowledged on Time	All documents in all functional groups that were acknowledged on-time.
Late Acknowledgement	Documents that were acknowledged after the policy time period expired.
Not Acknowledged	Documents that need acknowledgment and the policy time period has expired.
Pending	Documents that need acknowledgment, but are not yet considered late.
Excluded	Documents that are excluded from tracking.



A pie chart shows trading partner statistics in each category. Move the cursor to one of the colored segments to see the number and percentage of trading partners in that category.

Compliant	Trading partners that acknowledged all documents in all functional groups on-time.
Late Ack	Trading partners that acknowledged one or more documents after the policy time period expired.
No Ack	Trading partners that have one or more documents that need acknowledgment and the policy time period has expired.

Note: A trading partner that has been late once in the current month is included in the **Late Ack** category. Likewise, if the trading partner acknowledged all but one document, that company is represented in the **No Ack** category.

See also

- [“Filter Report Data” on page 102](#)
- [“View Data by Trading Partner or Document Type” on page 104](#)

Compliant Trading Partners

The Compliance Trading Partner report shows trading partners that responded to all documents on time. Click an **EDI Address** to see interchange and Functional Group information. A Functional Group is a set of “like” or same documents, for example, Purchase Orders, Invoices.

The screenshot displays the 'Compliant Trading Partners' report for mailbox ADW13787. The interface includes a sidebar with navigation options like 'Transaction Summary', 'Billable Reports', and 'Functional Acknowledgement Management'. The main content area shows a summary of trading partner performance for September 2007, including a table with columns for EDI Address, Trading Partner, Supplier ID, Docs Sent, Pending Count, and Acknowledged on Time.

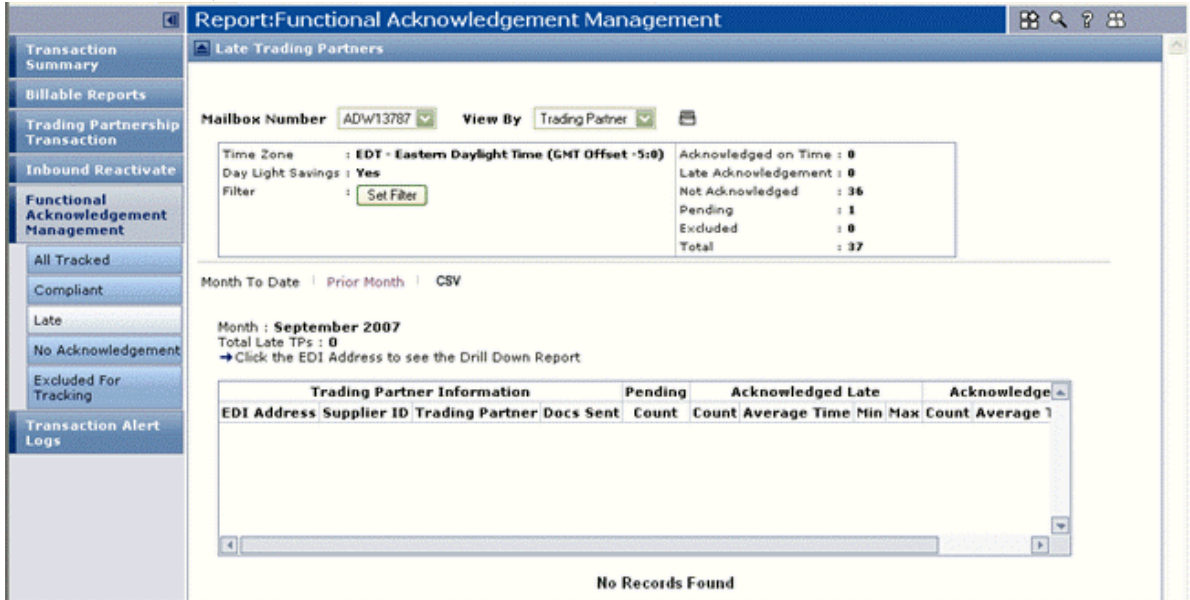
Trading Partner Information				Pending	Acknowledged on Time			
EDI Address	Trading Partner	Supplier ID	Docs Sent	Count	Count	Average Time	Min	Max
ZZ:DEMOHUB01	Demo_Hub	UNKNOWN	1	1	0	00:00	00:00	00:00

See also

- [“Filter Report Data” on page 102](#)
- [“View Data by Trading Partner or Document Type” on page 104](#)

Late Trading Partners Report

The Late Trading Partners report shows the trading partners that responded after the policy time period expired for at least one document. Click an **EDI Address** to see interchange and Functional Group information. A Functional Group is a set of “like” or same documents, for example, Purchase Orders, Invoices

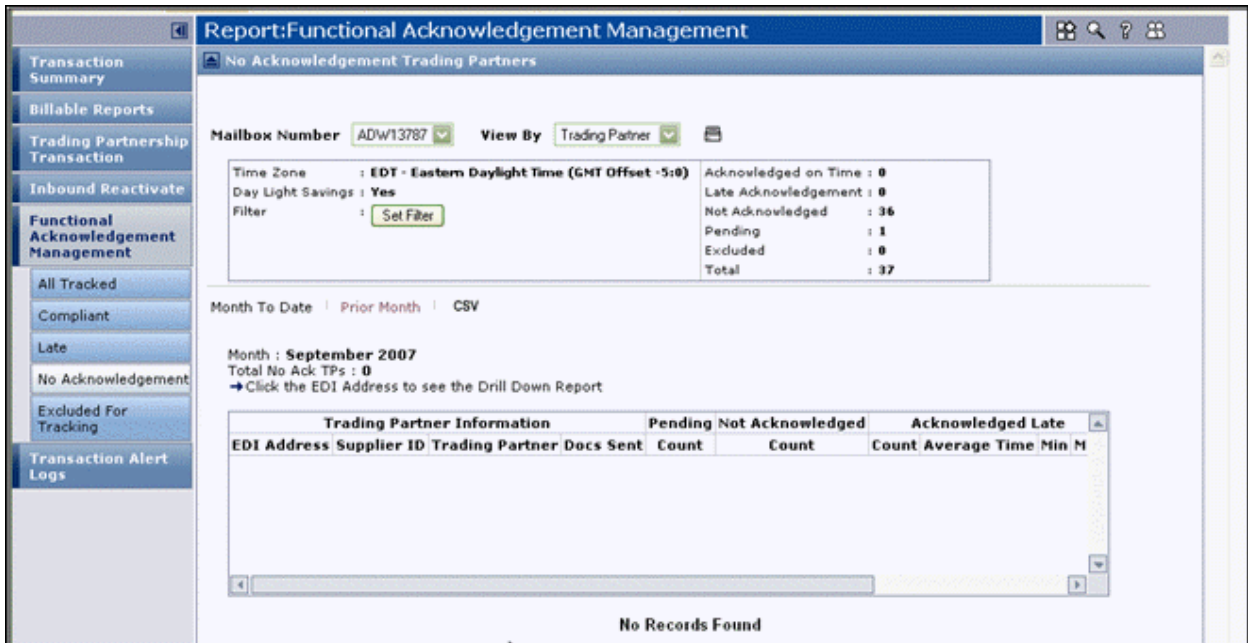


See also

- “Filter Report Data” on page 102
- “View Data by Trading Partner or Document Type” on page 104

No Acknowledgement Trading Partners Report

The No Acknowledgement Trading Partners report shows the trading partners that have not yet responded to all documents and the policy time period has expired. Click an EDI Address to see interchange and Functional Group information. A Functional Group is a set of “like” or same documents, for example, Purchase Orders, Invoices.

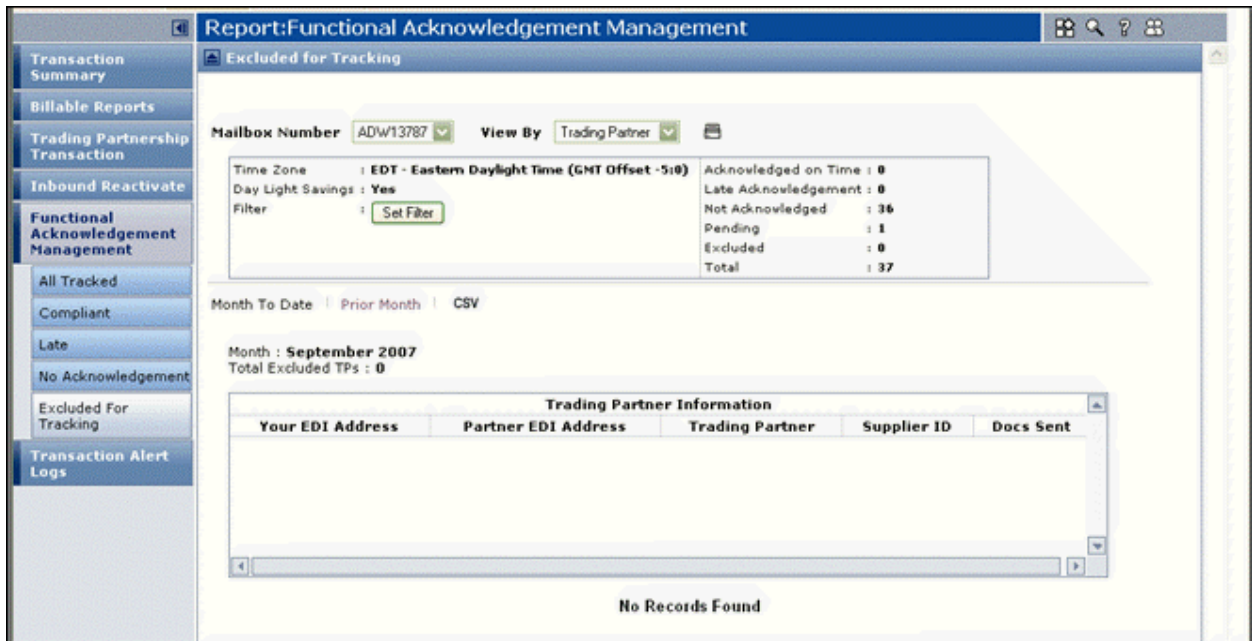


See also

- [“Filter Report Data” on page 102](#)
- [“View Data by Trading Partner or Document Type” on page 104](#)

Excluded from Tracking Report

The Excluded from Tracking report lists the trading partners whose documents you are not tracking.



See also

- [“Filter Report Data” on page 102](#)
- [“View Data by Trading Partner or Document Type” on page 104](#)

Filter Report Data

You can define data filters and apply them to your FA Management reports to get the exact data that you want.

To filter report data on FAM reports

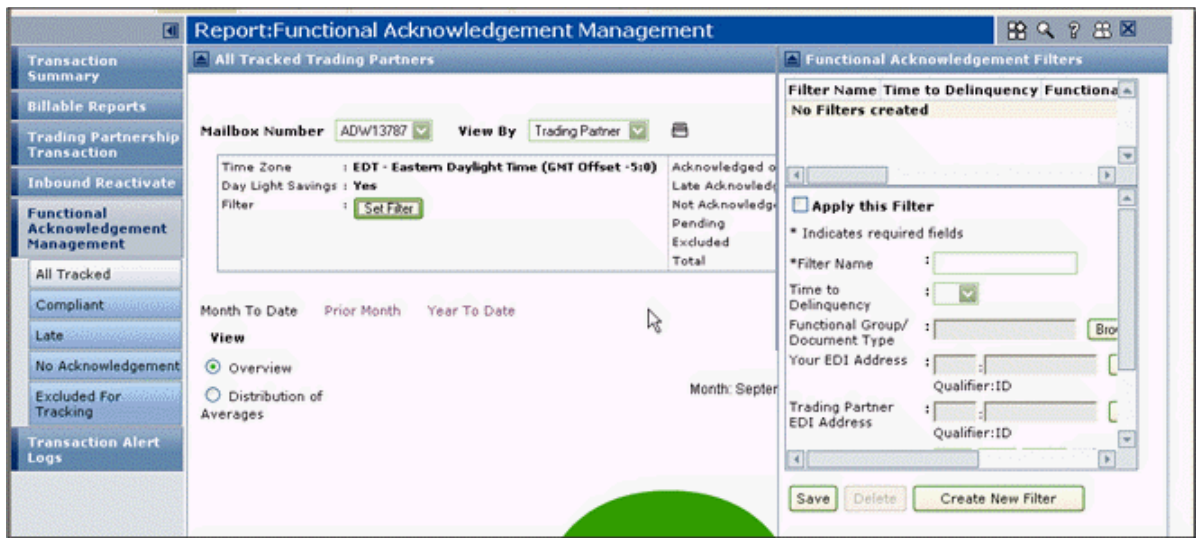
- 1 Click the **Reports** tab > **Functional Acknowledgement Management**.
- 2 On the left, select the name of the report you want to view:
 - All Tracked
 - Compliant
 - Late
 - No Acknowledgment
 - Excluded from Tracking

3 In the statistical area at the top, click **Set Filter**.



The Functional Acknowledgement Filters page opens.

4 In the **Filter Name** field, enter the name of the filter you are creating.



5 Enter your filtering criteria:

Filter Options	Description
Time to Delinquency	Select the number of hours after receipt that the trading partner(s) has to acknowledge all documents or document groups.
Functional Group/Document Type	Click Browse to find and select a specific document type. If you do not make a selection, data for all document types shows in the reports.
Your EDI Address	Click Select to select which of your EDI addresses to see reports for. If you do not make a selection, data for all of your EDI addresses shows in the reports.
Trading Partner EDI Address	Click Select to select which of your trading partner EDI addresses to see reports for. If you do not make a selection, data for all EDI addresses for all trading partners shows in the reports.

Important: Any filter parameter you enter overrides the corresponding parameter that was defined in the Event alerts or FA Management alerts. If

there is no corresponding Event alert or FA Management alert parameter, and you do not enter a filter parameter, an "ALL" applies for that parameter.

6 To apply the filter to your current report data, select the **Apply This Filter** option.

7 Click **Create New Filter**.

Your filter displays in the list at the top of the page. The filter remains active until you deactivate it.

To deactivate, modify, or delete the filter

Use this procedure to deactivate (or re-activate) the filter, modify the filter, or delete the filter.

1 Click the **Reports** tab > **Functional Acknowledgement Management**.

2 On the left, select the name of the report you want, either:

- All Tracked
- Compliant
- Late
- No Acknowledgment
- Excluded from Tracking

3 In the statistical area at the top, click **Set Filter**.

The Functional Acknowledgement Filters page opens.

4 Click the **Filter Name** to re-activate, deactivate, modify, or delete.

5 Perform the appropriate action:

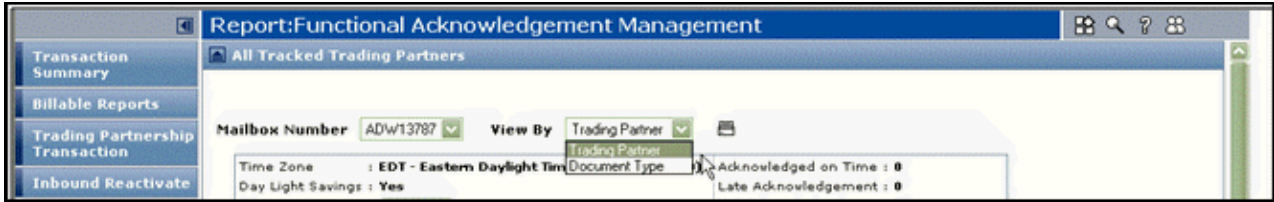
To . . .	Do this:
Delete the filter	Click Delete .
Deactivate the filter	Clear (deselect) the Apply This Filter check box.
Modify the filter	Change the filter parameters.
Re-activate the filter	Select the Apply This Filter check box.

6 Click **Update**.

View Data by Trading Partner or Document Type

You can change your report view by selecting a different **View By** option at the top of the page, either trading partner or document type.

- If you are **Viewing By Trading Partner**,



The report . . .	Displays statistics for . . .
All Tracked	All tracked trading partners (default).
Compliant	Trading partners that responded to all documents on time. <ul style="list-style-type: none"> ■ On the Compliant Trading Partners page, click an EDI Address to see interchange and functional group information.
Late	Trading partners that responded after the policy time period expired to at least one document. <ul style="list-style-type: none"> ■ On the Late Trading Partners page, click an EDI Address to see interchange and functional group information.
No Acknowledgement	Trading partners that have not yet responded to all documents and the policy time period has expired. <ul style="list-style-type: none"> ■ On the No Acknowledgement Trading Partners page, click an EDI Address to see interchange and functional group information.
Excluded From Tracking	Trading partners whose documents you do not track.

- If you are **Viewing By Document Type**,



Click this action . . .	To see statistics for . . .
All Tracked	All tracked documents from all trading partners (default).
Compliant	All documents that all trading partners responded to on time. <ul style="list-style-type: none"> ■ On the Compliant Documents page, click a Document Type to see interchange and functional group information.
Late	Documents that one or more trading partners responded to after the policy time period expired. <ul style="list-style-type: none"> ■ On the Late Documents page, click a Document Type to see interchange and functional group information.

Click this action . . .	To see statistics for . . .
No Acknowledgement	Documents that have yet to be acknowledged and the policy time period has expired. <ul style="list-style-type: none"> On the No Acknowledgement Documents page, click a Document Type to see interchange and functional group information.
Excluded From Tracking	Documents from any or all trading partners that you do not track.

Functional Acknowledgement Scorecard (FAS)

The Functional Acknowledgement Scorecard (FAS) applies to suppliers and vendors. It gives each supplier access to details and analysis of their supply chain performance. The service includes

- Trading Partner Dashboard summarizing document acknowledgement performance for all suppliers in your company.
- Month-to-date and prior month transaction visibility.
- Statistics for on-time, late, and unacknowledged transactions.
- Summary graphs showing monthly distribution of functional acknowledgement performance.

The first page you access provides an overview of your company performance for the current month. Statistics at the top show the number of documents in each category.

Acknowledged on Time	All documents in all functional groups that were acknowledged on-time.
Late Acknowledgement	Documents that were acknowledged after the policy time period expired. A policy time period is the number of hours the hub allows trading partners to acknowledge a document before the Hub considers partners to be late.
Not Acknowledged	Documents that need acknowledgment and the policy time period has expired.
Pending	Documents that need acknowledgment, but are not yet considered late.
Excluded	Documents that are excluded from tracking.

The area below the statistics lists all the compliant trading partners in the company for the current month:

Trading Partner Information	<ul style="list-style-type: none"> ■ EDI Address, Supplier ID, Trading Partner — Information about the individual supplier. ■ FGs Sent — Number of functional groups sent. A functional group is a set of “like” or same documents, for example, Purchase Orders, Invoices.
Pending	<ul style="list-style-type: none"> ■ Count — Functional groups containing one or more documents that were acknowledged within the policy time period.
Acknowledged On Time	<ul style="list-style-type: none"> ■ Count — Functional groups containing one or more documents that were acknowledged within the policy time period. ■ Avg — Average amount of time it took to acknowledge all documents in all functional groups. ■ Min, Max — Shortest and longest amounts of time it took to acknowledge all documents in a functional group.

To see other data views, you can

- [“Change Scorecard Parameters” on page 107](#)
- [“Filter Report Data” on page 102](#)

Change Scorecard Parameters

The Functional Acknowledgement Scorecard parameters determine which statistics you see.

To change Scorecard parameters

- 1 Click the **Reports** tab > **Functional Acknowledgement Scorecard**.
- 2 Select the data to view. If you have multiple mailboxes, select the applicable **Mailbox Number**, or **All** (default).
- 3 Select the time period. You can compare current month performance to prior months by selecting a different time link.
 - Click **Month to Date** (default) to see current month-to-date activity.
 - Click **Prior Month** to see previous month and notice trends.
- 4 Select the type of information. Within the time period you selected, you can see a listing of information for trading partners by clicking a report view action on the left side of the page.
- 5 Perform the appropriate action:

To see trading partners that . . .	Do this . . .
Responded to all documents on time	Click Compliant TPs .
Responded after the policy time period expired for at least one document	Click Late TPs .
Have not yet responded to all documents and the policy time period has expired	Click No Acknowledgement .

Active Invoices with Compliance

8

Active Invoices with Compliance (AIC) is a service that allows for country-specific regulatory compliance in invoice sharing between suppliers and buyers. This chapter explains how to use AIC to view and validate invoice transactions.

Topics include:

- [“Overview” on page 109](#)
- [“Search for Invoices Using Active Documents” on page 112](#)
- [“Search for Invoices Using Active Invoices” on page 135](#)

Note: Depending on your company’s subscription agreement and permissions, you might not see all items listed in this chapter.

Overview

AIC Search Tools

AIC provides two search tools to help you monitor the transmission, validation, and success of invoice transactions, depending on the time period for the search and the type of invoice information you want to view.

- Active Documents Search
- Active Invoices Search

Active Documents Search

The Active Documents search tool tracks invoice activity within the past 90 days.

Features:

- Verify invoice transmission.
- Confirm AIC processing status
- View GXS processing history
- Identify key invoice details
- Identify errors
- View invoice data in the submitted format (Supplier)
- View invoice data in AIC XML format (Supplier and Buyer)

For more information, see [“Search for Invoices Using Active Documents” on page 112](#).

Active Invoices Archive

After an invoice has been processed by AIC, it is stored in the Active Invoices Archive. This archive provides an invoice history for auditing and legal purposes. It stores electronically signed, and non-signed, invoices for 6 to 20 years, depending on each country's legal requirements or the subscriber preferences.

You can view legal invoice content in several formats, and access signature and certificate details.

Features:

- View invoice data in the format submitted by Suppliers
- View Supplier and Buyer invoice data in AIC XML format
- View or download signed and unsigned invoices as PDFs
- View signature and certificate details for signed invoices
- Download invoice artifacts
- Schedule invoice reporting
- View invoice processing history
- View invoice audit history

For more information, see ["Active Invoices Archive"](#) on page 135.

Supported Document Types

Supported Credit Notes

- Avoir
- Credit Memo
- Gutschrift
- Retouren-Gutschrift
- Return Credit Note
- Tax Credit Note
- TaxCreditNote - SelfBill

Supported Invoices

- | | | | |
|-----------------------|----------------------|--------------------------|---------------------------|
| ■ AbbreviatedInvoiceI | ■ CTe | ■ Lastschrift | ■ Tax Invoice |
| ■ CFDIv2.2 | ■ CTe - SelfBill | ■ MDe | ■ TaxInvoice - SelfBill |
| ■ CFDIv2.2- SelfBill | ■ Debit Memo | ■ NFe | ■ TaxDebitNote - SelfBill |
| ■ CFDIv3.2 | ■ Facture | ■ NFe - SelfBill | ■ TEMELFATURA |
| ■ CFDIv3.2 - SelfBill | ■ facture | ■ PaySlip-CFDIv3.2 | ■ TICARIFATURA |
| ■ Combined Invoice | ■ facture commercial | ■ PriceAdjust - SelfBill | ■ VPNS |
| ■ Complete Invoice | ■ FATTURAPA | ■ Rechnung | ■ Tax Invoice |
| ■ Corrected Invoice | ■ FPNS | ■ RPS | |
| ■ Coupon | ■ Invoice List | ■ SelfInvoicing | |

AIC Rules and Requirements

Data Flow

The direction of data flow between a sender and receiver can be outbound, inbound, or both, depending on the type of invoice.

File Data

Direction	Description
Outbound	The company is the Sender.
Inbound	The company is the Receiver.
Inbound and Outbound	The company is both sending and receiving invoices.

Interchange Data

Direction	Description
Outbound	The company is the Sender.
Inbound	The company is the Receiver.

Document Data

Direction	Description
Outbound	The company is the Sender.
Inbound	The company is the Receiver.
Inbound and Outbound	The Sender and Receiver belong to the same company.

ID Requirements

Two IDs must be provided to send source invoice documents to AIC:

- Sender and Receiver Value Added Tax (VAT) IDs
- Unique legal entity IDs

Exception:

The only exception to this rule is for invoices from an MDE document exchange platform where only the Sender VAT ID/Legal Entity Unique ID is required.

Multiple Invoices

AIC supports an interchange of multiple invoice documents. Multiple invoice documents can be sent to AIC at the same time.

Exception:

AIC does not support multiple invoice documents for EANCOM input types. Only one EANCOM Invoice document can be sent to AIC at a time.

File Size

AIC supports PDF files containing up to 10,000 lines.

Files to be signed cannot exceed more than 4 MB.

Interchange File Rejection

Interchange files are rejected if an irrecoverable error occurs while processing.

Mapping

Mapping of key invoice attributes and their path in the canonical format is pre-configured in the AIC system.

Search for Invoices Using Active Documents

Use the Active Documents search tool to view invoice activity within the past 90 days.

You can search for basic information, such as a partner name or mailbox number. Or, locate files, documents, and interchanges and view their lifecycle and AIC event information.

Basic Active Documents Searches

To search for invoices using basic search criteria

- 1 Click the Reports tab.

The Active Documents Search page opens. The File search level fields also display by default.

The screenshot shows the 'Active Documents Search' page within the 'Reports' tab. The left sidebar contains a list of navigation items: Search, Scheduled Reports, Delivered Reports, Transaction Summary, Status Reports, Trading Partnership Transaction, Inbound Reactivate, Standard Reports, and Active Invoices. The main content area is titled 'Active Documents Search' and features a search form. At the top, there is a 'Select saved Searches' dropdown menu with 'OK' and 'Delete' buttons. The search criteria are organized into several sections:

- GXS Ref No**: Text input field.
- My Address**: Text input field.
- Partner Name**: Text input field.
- Mailbox**: Dropdown menu with 'AAA62038' selected.
- Direction**: Dropdown menu with 'Both sent and received' selected.
- Partner Address**: Text input field.
- Time Frame**: Dropdown menu with 'Specific No. Of days' selected.
- Last "X" No. of Days From**: Input '3', '00:00:00'.
- To**: Input '0', '06:01:35'.

 Below these fields are radio buttons for search types: File, Interchange, and Document. A second set of search criteria is provided:

- Application Reference**: Text input field.
- Sender Reference**: Text input field.
- ILog Number**: Text input field.
- Status**: Dropdown menu with 'All' selected.
- Interconnect Name**: Dropdown menu with 'All' selected.
- Mailbag ID**: Text input field.
- Translation Session Number**: Text input field.
- Original File Name**: Text input field.

 At the bottom of the form are 'Search' and 'Clear' buttons.

- 2 Set the criteria for the search.

The following options are available when searching for invoices using Active Documents.

Search Field	Description
Select Saved Searches	Choose a search that you or other users have saved. See “Save Searches” on page 186 .
GXS Ref No	A unique reference number or document number, assigned by the Active Documents meta data repository to track items.
My Address	Your EDI ID or OpenText routing mailbox ID (or IDs).
Partner Name	The company name of the trading partner associated with the partner address.
Time Frame	Provides options for searching within a specific time period. See “Search for Invoices by Time Frame” on page 114 .
Mailbox	A OpenText mailbox ID (or IDs).
Direction	The direction of the data flow from the ID specified in the My Address field, which can be outbound, inbound, or both. It uses the interchange sender and receiver addresses for EDI data. Otherwise, the file sender and receiver are used. See “Data Flow” on page 111 .
Partner Address	The mailbox ID (or IDs) of the Trading Partner.
(Search Level) File Interchange Document	<p>Search levels refer to the type of data that can be retrieved.</p> <ul style="list-style-type: none"> ■ File — Searches for two types of files, which contain documents passing through the Managed Services environment: <ul style="list-style-type: none"> ■ Files with data that has been translated from one non-EDI data format to another non-EDI data format. ■ Files with data that has been processed as pass-through data (without translation). Additional options include searching for files with or without errors, negative alerts, and other events. ■ Interchange — Searches for data in an EDI format that reports activity at the interchange level. ■ Document — Searches for electronic business documents, typically, in two formats: <ul style="list-style-type: none"> ■ EDI format: Reports activity at the document level. ■ XML format: Processed with XML document identification. Additional options include viewing related documents such as invoices related to purchase orders.

Search for Invoices by Time Frame

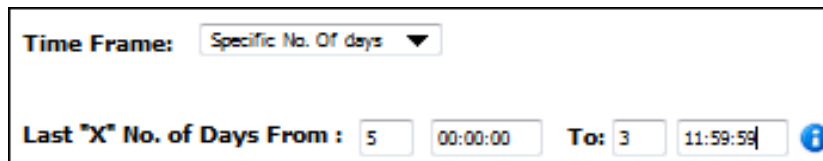
From the Active Documents Search page, you can search for invoices that were generated in a specific time frame in three ways:

- Number of Days Range
- Specific Date Range
- Relative Time Range

To search for invoices within a Specific Number Of Days

- 1 On the Active Documents Search page, select **Specific No. Of Days** from the **Time Frame** drop-down menu.
- 2 Specify the range for the number of recent days for the search in the **Last "X" No. Of Days, To: and From:** fields.

For example, search from 5 days ago to 3 days ago.




The screenshot shows a search form with a 'Time Frame' dropdown menu set to 'Specific No. Of days'. Below it, the 'Last "X" No. of Days From:' field is set to '5', the 'To:' field is set to '3', and the 'From:' time field is set to '00:00:00' and the 'To:' time field is set to '11:59:59'. There is a blue information icon to the right of the time fields.

- 3 Specify the start time and end times for the search.
For example, beginning at 00:00:00 the first day and ending at 11:59:59 on the last day.
- 4 Click **Search**.

To search by Specific Date Range

- 1 On the Active Documents Search page, select **Specific Date Range** from the **Time Frame** drop-down menu.



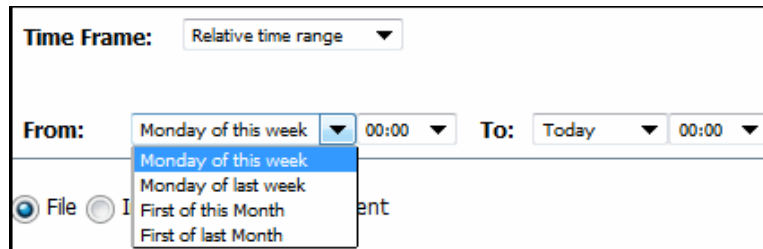
The screenshot shows a search form with a 'Time Frame' dropdown menu set to 'Specific Date Range'. Below it, the 'From:' field is set to '9/9/2016' and the 'To:' field is set to '9/12/2016'. Both date fields have a calendar icon to their right. The 'From:' time field is set to '00:00:00' and the 'To:' time field is set to '01:05:17'.

The default is the time period for the previous 36 hours.

- 2 To change the time period:
 - a Click the calendar icon.
 - b Specify a new start date and time or end date and time.
- 3 Click **Search**.

To search by Relative Time Range

- 1 On the Active Documents Search page, select **Relative Time Range** from the **Time Frame** drop-down menu.
- 2 Specify the start time for the relative search time frame.
 - a Select one of the following options from the **From:** drop-down menu.
 - Monday of this week
 - Monday of last week
 - First of this Month
 - First of last Month



- b Select one of the following options from the **To:** drop-down menu.
 - **Tomorrow**
 - **Yesterday**
- 3 Click **Search**.

Searching for Multiple Items

If searching for multiple items, such as addresses, separate each address with comma.

Example: ZZ:122133399,09:0045599999

Wildcard Searches

If you know only one value for a search field, type * for a wildcard search.

Advanced Active Documents Searches

Advanced searches allow you to locate files, documents, and interchanges. You can then view their lifecycle and AIC event information.

Search For Files

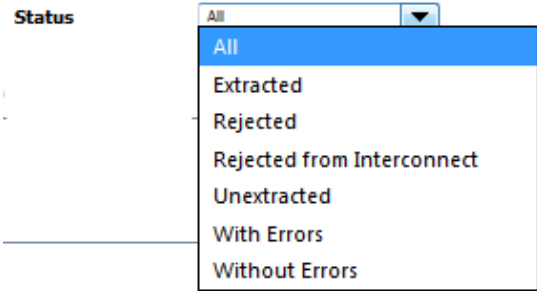
To search for files

- 1 Click the **Reports** tab in Trading Grid Online.

The Active Documents Search page opens for a File search by (default).

- 2 Specify the criteria for the search.

Search Field	Description
Application Reference	The application reference for the file, which typically indicates a file or document type. Example: 850,810
ILOG Number	Input Log Number. A unique, 11-digit number assigned by the the system to identify a file transmitted by the Sender. This number is based on a combination of the month, day, Greenwich Mean Time, and the decimal fraction of the hour.
Interconnect Name	The name of a third-party service, such as a VAN, between your company and OpenText. Used if a file is sent to, or received from a third party.
Translation Session Number	A number assigned to each translation process. Example: 850
Sender Reference	A number or alpha-numeric value that references the file in the routing process. The system assigns this value during the routing cycle. Example: 613821382

Search Field	Description
Status	<p>A list of possible statuses for a search, which can apply to both inbound and outbound transactions.</p> <p>You can search for the following file status:</p> <ul style="list-style-type: none"> ■ Extracted — The trading partner retrieved the document from the mailbox or interconnect service. ■ Rejected — The file was rejected by OpenText. ■ Rejected from Interconnect ■ Unextracted — The trading partner did not retrieve the document from the mailbox or interconnect service. ■ Incomplete — Incomplete itineraries (OpenText instructions for processing a document). ■ With Errors ■ Without Errors ■ All 
Mailbag ID	A unique number that references an interconnect service such as a third-party VAN.
Original File Name	The name of the original file that was sent.

3 Click **Search**.

The File Search Results page lists the files that meet the search criteria by the most recent timestamp (**Created Date and Time** column). See [“View Search Results” on page 123](#).

Reports Search Results

Search results for "File" criteria on September 2, 2016 [View search criteria](#) | [CSV](#) | [Print](#)

Actions ▾

Use Shift+Click to select multiple

<input type="checkbox"/>	Mailbox	GXS Ref No	Sender	Receiver	ILog Number	Application Reference	Sender Reference	Created Date and Time	Partner Name
<input type="checkbox"/>	AAA62038	F-10154473526	ZZ:WARNSSESUP	ZZ:WARNSSESUP	9777020102	June24 14246	1045948	03-Sep 05:02:19 GST	HC_WARNSESUP
<input type="checkbox"/>	AAA62038	F-10154473525	ZZ:WARNSSESUP	ZZ:WARNSSESUP	9777020101	June24 14246	1045947	03-Sep 05:02:06 GST	HC_WARNSESUP
<input type="checkbox"/>	AAA62038	F-10154468530	ZZ:WARNSSESUP	ZZ:WARNSEBUY	9767020590	INVOICE_PKG	14232990	03-Sep 02:52:02 GST	HC_WARNSEBUY
<input type="checkbox"/>	AAA62038	F-10154468529	ZZ:WARNSSESUP	ZZ:WARNSSESUP	9767020589	INVOICE_PKG	14232990	03-Sep 02:51:49 GST	HC_WARNSESUP
<input type="checkbox"/>	AAA62038	F-10154463532	ZZ:WARNSSESUP	ZZ:WARNSSESUP	9767020100	INVOICE_PKG	AICKLIDDEC31_S	03-Sep 02:39:10 GST	HC_WARNSESUP
<input type="checkbox"/>	AAA62038	F-10154463531	ZZ:WARNSSESUP	ZZ:WARNSEBUY	9767020099	INVOICE_PKG	AICKLIDDEC31_R	03-Sep 02:39:06 GST	HC_WARNSEBUY
<input type="checkbox"/>	AAA62038	F-10154428543	ZZ:WARNSSESUP	ZZ:WARNSEBUY	9767020022	INVOICE	586467470	02-Sep 15:14:52 GST	HC_WARNSEBUY
<input type="checkbox"/>	AAA62038	F-10154408539	ZZ:WARNSSESUP	ZZ:WARNSSESUP	9767020464	INVOICE_PKG	14232990	02-Sep 10:30:26 GST	HC_WARNSESUP
<input type="checkbox"/>	AAA62038	F-10154408536	ZZ:WARNSSESUP	ZZ:WARNSEBUY	9767020465	INVOICE_PKG	14232990	02-Sep 10:30:24 GST	HC_WARNSEBUY
<input type="checkbox"/>	AAA62038	F-10154408534	ZZ:WARNSSESUP	ZZ:WARNSSESUP	9767020462	INVOICE_PKG	14232990	02-Sep 10:30:17 GST	HC_WARNSESUP

« Previous 20 Items 1 to 20 of 82 Next 20 » View 20 items per page

[Back](#) [Save/Schedule Report](#)

Search For Interchanges

To search for Interchanges

- 1 Click the **Reports** tab in Trading Grid Online. The Active Documents Search page opens.
- 2 Select **Interchange** to open the Interchange search section.

Reports Active Documents Search

Select saved Searches [OK](#) [Delete](#)

GXS Ref No Mailbox

My Address **Direction**

Partner Name Partner Address

Time Frame:

Last "X" No. of Days From : To:

File Interchange Document

Interchange Control Number Production/Test Flag

[Search](#) [Clear](#)

3 Specify the criteria for the search.

Search Field	Description
Interchange Control Number	A unique number used to track an interchange.
Production/Test Flag	There are three types of flags: <ul style="list-style-type: none"> ■ Both Production and Test ■ Production ■ Test

4 Click **Search**.

The Interchange Search Results display for the invoice Interchanges that meet the search criteria. By default, the page sorts the Interchange list by **Created Date and Time**, starting with the most current date and time.

See “View Search Results” on page 123.

Search results for "Interchange" criteria on September 2, 2016

View search criteria | CSV | Print

Actions ▾

GXS Ref No	Partner Name	Sender	Receiver	Created Date and Time	Prod/Test Flag	Control Number
I-10124063735	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	02-Sep 15:10:48 GST	P	586467470
I-10124063734	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	02-Sep 14:17:29 GST	P	586467468
I-10124063733	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	02-Sep 14:14:20 GST	P	586467467
I-10124053733	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	02-Sep 10:26:28 GST	P	14232990
I-10124003737	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 14:41:24 GST	P	14232989
I-10124003736	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 14:40:30 GST	P	14232988
I-10124003735	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 14:36:55 GST	P	14232986
I-10124003734	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 14:35:47 GST	P	14232985
I-10124003733	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 14:34:57 GST	P	14232984
I-10123998734	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 14:39:44 GST	P	14232987
I-10123998733	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 13:52:49 GST	P	14232981
I-10123993737	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 13:58:14 GST	P	14232983
I-10123993736	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 13:55:04 GST	P	14232982
I-10123993734	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 13:47:42 GST	P	14232980
I-10123993733	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 13:40:09 GST	P	202235486
I-10123983743	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 13:21:11 GST	P	232235486
I-10123968733	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 10:05:34 GST	P	232965486
I-10123948741	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	01-Sep 02:40:10 GST	P	392915108
I-10123923735	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	31-Aug 16:23:09 GST	P	586467465
I-10123923733	HC_WARNSEBUY	ZZ:WARNSSEUP	ZZ:WARNSEBUY	31-Aug 16:16:24 GST	P	586467464

« Previous 20 Items 1 to 20 of 25 Next 20 » View 20 items per page

Back Save/Schedule Report

Search For Documents

To search for documents

- 1 Click the **Reports** tab in Trading Grid Online.
The Active Document Search page opens.
- 2 Select **Document** to open the Document search section.

3 Specify the criteria for the document search.

Parameter	Description
Document Type	An EDI code that identifies a specific type of EDI document, such as 810 or INVOIC. To search for multiple Document Types: To search for multiple types of documents, separate each type with a comma. For example, type 810, INVOICE.
Functional Group Control Number	A number assigned by EDI systems to the functional group header and trailer segments of an EDI file to verify data integrity. Typically, this number applies only to data in ANSI X12 format.
My Functional Group Address	Your EDI functional group address. Applies only to the ANSI X12 standard.
Functional Group Type	A two-digit code in the group header segment of an ANSI X12 EDI-formatted file that identifies the type of business document it contains such as PO, PS, IN.
Translation Session Number	A unique number used to track a Translation Session.
Primary Key	Select this option if the first key typed is the primary key.
<i>Primary Key Value</i>	The identifier value for the primary key. For example, type the actual purchase order number or product ID to use in the search. To search for multiple primary key values, separate each type with a comma. For example, type 123, 789. Search Tip: Type a partial value, followed by an asterisk (*) to retrieve all documents that begin with those characters, for example, 1234*
Secondary Key	
<i>Secondary Key Value</i>	The identifier value for the secondary key. To search for multiple secondary key values, separate each type with a comma. For example, type 123, 789. Search Tip: Type a partial value, followed by an asterisk (*) to retrieve all documents that begin with those characters, for example, 1234*
Status	A drop-down list of possible statuses for a search, based on the platform, tracking level, and configuration. Status searches can apply to inbound and outbound transactions. In Managed Services, you can search the following statuses, depending on your service subscription: <ul style="list-style-type: none"> ■ Acknowledged ■ Not Acknowledged Note: In any implementation, leave All enabled to not search based on a specific status.
Legal Profile Names	<ul style="list-style-type: none"> ■ My Name ■ Partner Name
Invoice Date Range	<ul style="list-style-type: none"> ■ Specific Date ■ From Date ■ Last 'X' Days ■ To Date

4 Click **Search**.

The Document Search Results page displays the invoice documents that meet the search criteria. By default, the Search Results page sorts by **Created Date and Time**, starting with the most current date and time.

See “View Search Results” on page 123.

Search Results

Search results for "Document" criteria on September 2, 2016 [View search criteria](#) | |

Actions ▾

GXS Ref No	Sender	Receiver	Document Type	Primary Key	Created Date and Time
D-10087011135	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NONCOMPLIANT--Sept2-1B	02-Sep 15:10:50 GST
D-10087011136	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NONCOMPLIANT--Sept2-1C	02-Sep 15:10:50 GST
D-10087011134	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NONCOMPLIANT--Sept2-1A	02-Sep 15:10:49 GST
D-10087011132	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NSHR-USPDF-EML-INT-Sept2-1B	02-Sep 14:17:31 GST
D-10087011133	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NSHR-USPDF-EML-INT-Sept2-1C	02-Sep 14:17:31 GST
D-10087011131	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NSHR-USPDF-EML-INT-Sept2-1A	02-Sep 14:17:30 GST
D-10087011129	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NSHR-SPDF-EML-INT-Sept2-1B	02-Sep 14:14:23 GST
D-10087011130	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NSHR-SPDF-EML-INT-Sept2-1C	02-Sep 14:14:23 GST
D-10087011128	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NSHR-SPDF-EML-INT-Sept2-1A	02-Sep 14:14:22 GST
D-10086996132	ZZ:WARNSSESUP	ZZ:WARNSEBUY	INVOIC	KA-NSHRUSPDF2-COM-Sept1	02-Sep 10:26:29 GST



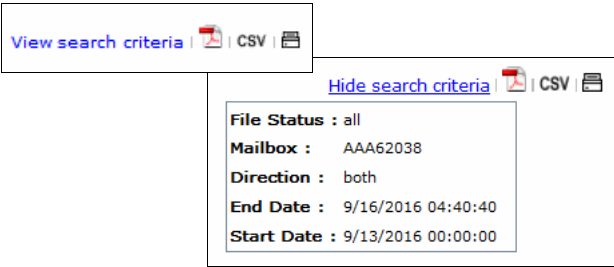
« Previous 10 Items 1 to 10 of 47 Next 10 » View 10 items per page

View Process Life Cycle

View Search Results

The Search Results page for file, interchange, and document criteria displays the applicable files by the most recent timestamp.

From all Search Results pages, you can also do the following:

To	Description
Sort the data.	Click a column heading to sort the data from ascending to descending order (or vice versa).
View and save search results as a PDF file.	Click  .
View and save the search results as a .csv file.	Click CSV .
Print search results.	Click  .
View search criteria.	Click View Search Criteria to view the parameters for the current search. 
Save or schedule reports.	Click Save/Schedule Report to save a report as a .csv or .pdf file or schedule when to generate a new report . See " Schedule Reports " on page 124.
View Processing Lifecycle information.	Click the GXS Ref Number for an invoice to open the Processing Lifecycle page. See " View Processing Lifecycle Information " on page 130.

Save Search Queries

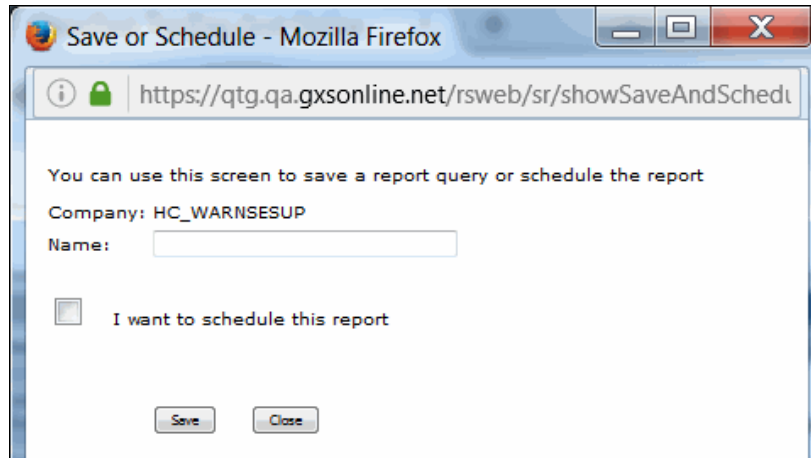
After setting the search criteria and generating the results, you can save the search query settings (also called a report query) to use again for a report.

You can use a search query that both you and others in your organization have saved.

To save a search query

- 1 Set the search criteria, and run the search. See "[Active Documents Search](#)" on page 109.
- 2 On the Search Results page, click **Save/Schedule Report**.

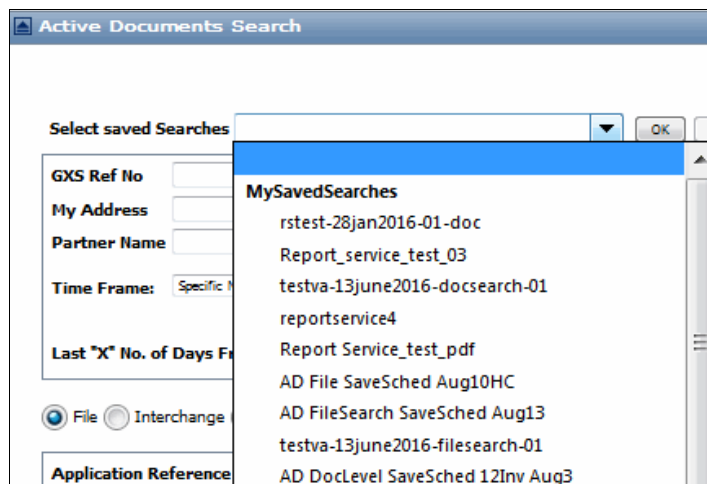
The Save or Schedule page displays, along with the report name.



3 Type a name for the report in the **Name** field.

4 Click **Save**.

The Active Documents Search page updates the **My Saved Searches** list with the saved report.



Schedule Reports

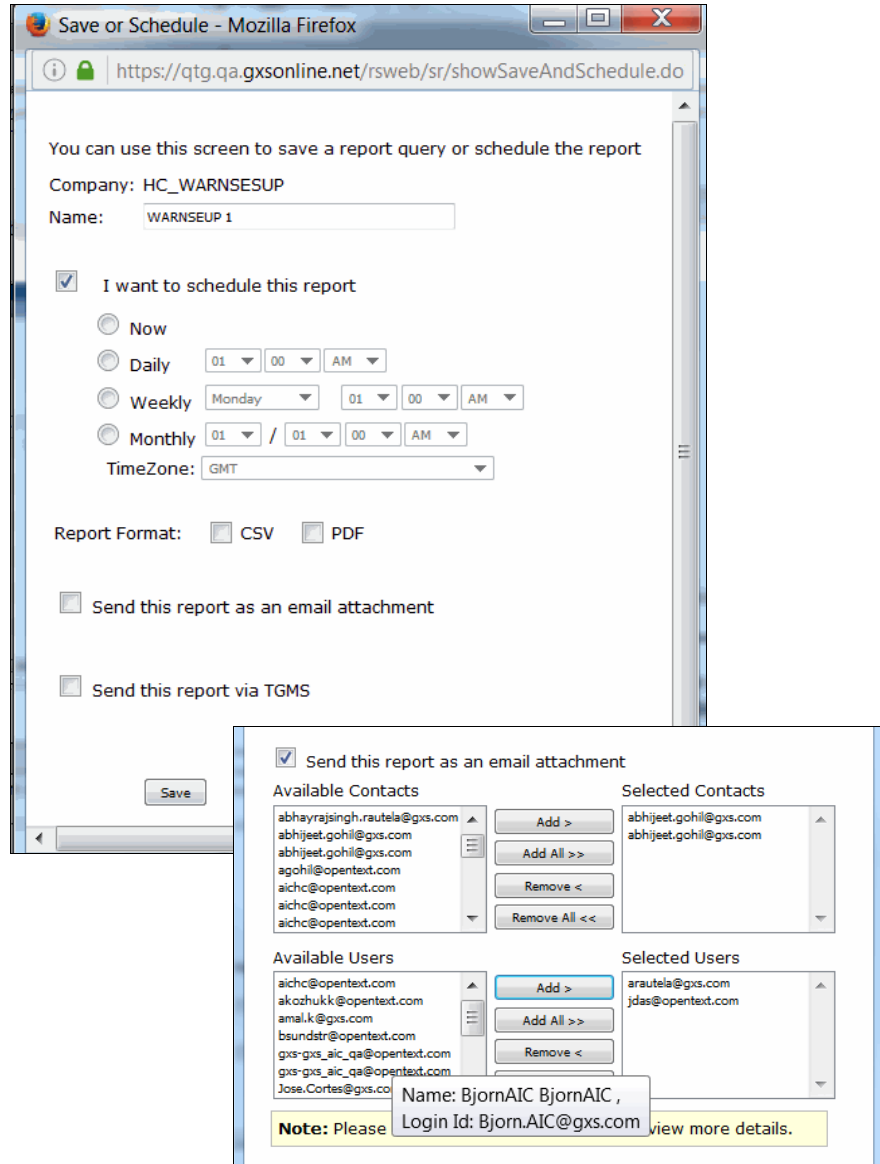
Scheduling reports allows you to get the latest report data without having to manually run a report. You can schedule reports to run automatically at certain times (daily, weekly, or monthly), and email reports to Trading Partners and users in your company in .csv or .pdf formats.

To set up a report schedule

1 In the Search Results page, click **Save/Schedule Report**.

The Save or Schedule page displays the name of the company for the report.

2 Type a name for the report in the **Name** field.



- 3 Click the checkbox, **I want to schedule this report**, and select the time frame and time zone for the scheduled report.
Note: To run a one-time report, select **Now**.
- 4 Click the checkbox for the report format, either **CSV** or **PDF**.
- 5 To email the report, click the checkbox, **Send this report as an email attachment**. Specify the email addresses of the users and contacts to receive the report.
Note: You can only add contacts and users that have access to the report folder, listed as available.
- 6 To send the file to a Trading Partner through Trading Grid Message Services (TGMS), click the **Send this report via TGMS** checkbox.
- 7 Click **Save**.

The system adds the schedule to the Scheduled Reports list and displays a confirmation message.

To view the scheduled report, click **Scheduled Reports** in the Reports tab. See [“View Report Schedules” on page 126](#).

View Report Schedules

The Scheduled Reports page lists all of the reports that have been scheduled for delivery and the delivery status.

From the Scheduled Reports page, you can also do the following:

- Change a report schedule.
- Delete a scheduled report.
- Schedule a one-time report to run immediately.

To view scheduled reports

- 1 Click the **Reports** tab in Trading Grid Online.
- 2 Click **Scheduled Reports**.

The Scheduled Reports page opens.

Report Name	Schedule	Report Format	Delivered	Created By	Execute Once
AIC Daily SaveSched Warner	DAILY, 01:00 AM, GMT	CSV,PDF	Email	v v	<input type="button" value="Execute"/>
AIC SaveSched 153436Inv TGMS Mar16	DAILY, 03:45 AM, GMT	CSV,PDF	TGMS	v v	<input type="button" value="Execute"/>
AIC SaveSched 162458 Mar16 TGMS	DAILY, 09:45 AM, GMT	CSV,PDF	TGMS	v v	<input type="button" value="Execute"/>
AIC SaveSched 175681Inv TGMS Mar17 Daily	DAILY, 04:00 AM, GMT	CSV,PDF	TGMS	v v	<input type="button" value="Execute"/>
AIC SaveSched 89263Inv RS TGMS Mar10	DAILY, 01:00 AM, GMT	CSV,PDF	TGMS	v v	<input type="button" value="Execute"/>

- 3 Click the name of the report in the **Report Name** column to view the schedule.

Note: If the report name does not display as a hyperlink, it is a one-time report that was previously executed.

To run a one-time report immediately

- 1 Click the **Reports** tab in Trading Grid Online.
- 2 Click **Scheduled Reports**.

The Scheduled Reports page opens.

- 3 Click the report name.
- 4 Click **Execute** for the report.

The system adds a one-time report to the **Scheduled Reports** list with the same name, along with ONCE and the current date and time.

To change a report schedule

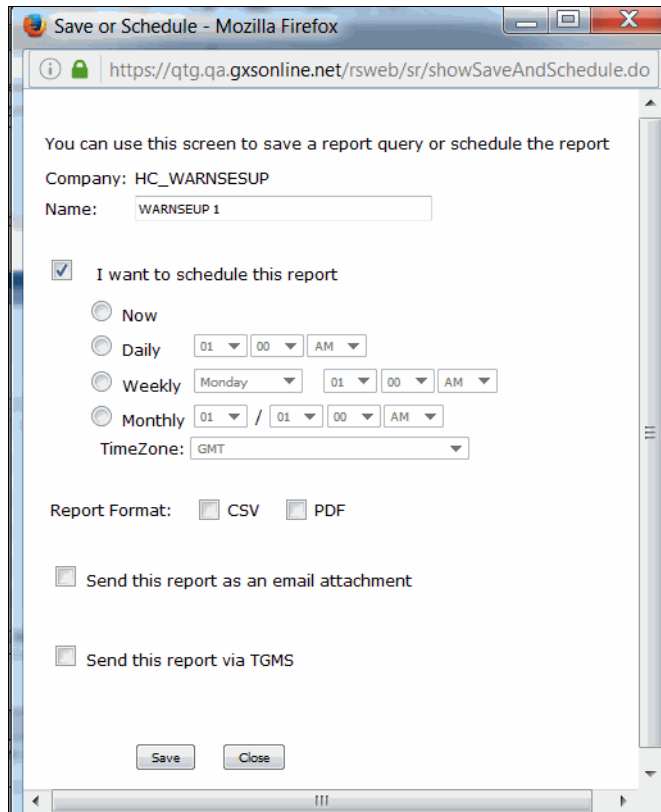
1 Click the **Reports** tab in Trading Grid Online.

2 Click **Scheduled Reports**.

The Scheduled Reports page opens.

3 Click the name of the report in the **Report Name** column.

The Save or Schedule page opens.



4 Change schedule criteria for the report.

5 Click **Save**.

To delete a scheduled report

1 Click the **Reports** tab in Trading Grid Online.

2 Click **Scheduled Reports**.

The Scheduled Reports page opens.

3 Click **Only my reports** from the **View** drop-down menu.

Scheduled Reports

View:

<input type="checkbox"/>	Report Name	Schedule	Report Format	Delivered
<input type="checkbox"/>	AIC Daily SaveSched Warner	DAILY, 01:00 AM, GMT	CSV,PDF	Email
<input type="checkbox"/>	AIC SaveSched 175681Inv TGMS Mar17 Daily	DAILY, 04:00 AM, GMT	CSV,PDF	TGMS
<input type="checkbox"/>	AIC SaveSched 89263Inv RS TGMS Mar1 0	DAILY, 01:00 AM, GMT	CSV,PDF	TGMS

« Previous 5 Displaying Records 1 to 5 of 52 Next 5 » View 5 items per page

The list refreshes.

- 4 Click the check box for report(s) you want to delete from the list.
- 5 Click **Delete**.

View Delivered Reports Lists

Delivered Reports are scheduled reports, including one-time reports, which have been generated by the system.

To view a list of delivered reports

- 1 Click the **Reports** tab in Trading Grid Online.
- 2 Click **Delivered Reports**.

The Delivered Reports page opens.

Reports

Delivered Reports

View:

Report Name	Report Format	Report Date & Time	User	Status	Report Id
AIC SaveSched SecondaryKey IPADN Dail y 5.18 IQA	CSV	12/10/2016 12:44:48 GMT	v v	New	1082433
AIC SaveSched SecondaryKey IPADN Dail y 5.18 IQA	PDF	12/10/2016 12:44:48 GMT	v v	New	1082434
AIC SaveSched Daily2073Inv Mar4	PDF	12/10/2016 12:35:32 GMT	v v	Failed	1082359
AIC SaveSched Daily2073Inv Mar4	CSV	12/10/2016 12:35:01 GMT	v v	Failed	1082357
InvoicesByMonth_NEWRD	PDF	12/10/2016 11:44:39 GMT	SUPER_ADMIN_ USER SUPER_A DMIN_USER	New	1082372

« Previous 5 Displaying Records 1 to 5 of 2739 Next 5 » View 5 items per page

The Delivered Reports page lists the following information for each report.

- Name of the report
- Report format (such as PDF)
- Date and time the report was run
- Name of user who created/scheduled the report
- Report status (such as **New**, **Read**, **Processing**, or **Failed**)
- Report ID (click the link to view audit log for the report)

Note: Active Documents deletes delivered reports after 45 days.

To download a delivered report

- 1 Locate the latest version of the report in the **Delivered Reports** list.

Report Name	Report Format	Report Date & Time	User	Status
ASN	CSV	Friday, January 06, 2012 18:34:21 GMT	Bob Dileo	Processing
iFTP search chubachi	PDF	Friday, January 06, 2012 16:00:27 GMT	Hiroyuki Chubachi	Processing
Group by with 3404533 and 850	CSV	Friday, January 06, 2012 15:30:22 GMT	Kit Ellis	New
revert_test	CSV	Friday, January 06, 2012 11:30:38 GMT	Mark Logan	Processing
revert_test	PDF	Friday, January 06, 2012 11:30:37 GMT	Mark Logan	Processing

- 2 Click the name of the report.

Note: The status cannot be **Processing**.

- 3 Follow the prompts to open (or save) the report.

View Audit Logs

An audit log for each delivered report provides additional information such as who received the report and the time it was delivered.

Note: An audit log is only available if Active Documents emails the report to recipients.

To view the Audit Logs

- 1 Locate the latest version of the report in the **Delivered Reports** list.
- 2 In the **Report ID** column, click the link for the report.

The Audit Log displays audit information such as who received the report.

Audit Date & Time (GMT)	Audit Item	Recipient	Sender	Application Ref	Status	Additional Information
2013-10-01 01:17:54.0	Email Delivery	thrayambaka.chitukula@gxs.com			SENT	
2013-10-01 01:17:58.0	Email Delivery	surendra.malreddy@gxs.com			SENT	
2013-10-01 01:18:03.0	Email Delivery	sreekantch.reddy@gxs.com			SENT	
2013-10-01 01:18:11.0	Email Delivery	surendracompuser@gmail.com			SENT	
2013-10-01 01:18:24.0	Email Delivery	ys_reddy2000@yahoo.com			SENT	
2013-10-01 01:18:24.0	Email Delivery	Susana.Vazquez@gxs.com			SENT	

Delete Delivered Reports

Delete a delivered report from the **Scheduled Reports** list. See [“To delete a scheduled report” on page 127.](#)

View Processing Lifecycle Information

Active Documents captures the processing history of files, EDI interchanges, EDI documents, and XML documents as they pass through various tracking points.

Processing lifecycle details provide information about a specific transaction at key processing points in each environment. The points that display in the lifecycle history depend on the path the transaction follows.

You can view processing lifecycle information for a transaction:

- AIC process details
- Document details
- Managed Service Platform details
- Trading Grid Messaging Service (TGMS) details


Note: To view processing lifecycle information quickly, click the GXS Ref Num for an invoice on the Search Results page. **KP: Edit from here if time allows**

To view processing lifecycle information for a transaction

- 1 Search for a file, document, or interchange. See [“Active Documents Search” on page 109.](#)
- 2 On the Search Results page, do one of the following:
 - Documents: Click the Document ID for the applicable document.
 - Files: Click the Sender Reference number for the applicable file.

Below is an example of a Processing Lifecycle page.




- 3 To download the Processing Lifecycle page into a PDF document, which can then be printed, click .
- 4 The Processing Lifecycle page includes several sections, depending on the processing stages. Some sections allow you to further drill down through the data.

Click these lifecycle icons to navigate through the page.




To view AIC process details

On the Process Lifecycle page, click . The AIC area tells you if the invoice transaction and the electronic signing were successful. If there were errors, click the **Error** link for an explanation. Correct the invoice and resubmit it.

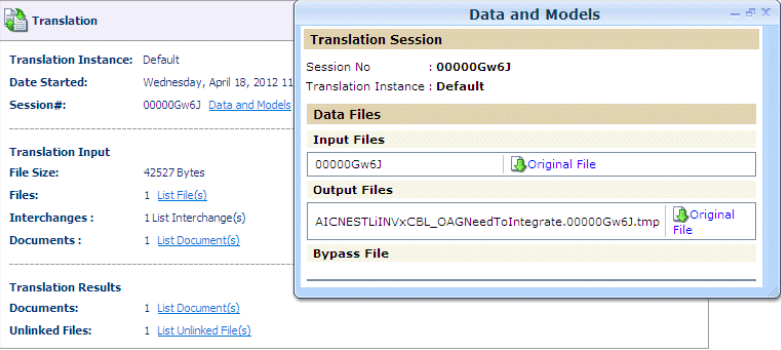
AIC	
Status History	
Processing Started	Wednesday, August 10, 2016 14:56:07 IST
Data Validation Success	Wednesday, August 10, 2016 14:56:23 IST
Human Readable Invoice Image generation success	Wednesday, August 10, 2016 14:56:26 IST
Sign Success	Wednesday, August 10, 2016 14:56:47 IST
PDF_CONTAINER_GENERATION_SUCCESS	Wednesday, August 10, 2016 14:57:05 IST
Sender Archive Success	Wednesday, August 10, 2016 14:57:23 IST
Signature Validate Success	Wednesday, August 10, 2016 14:57:26 IST
Receiver Archive Success	Wednesday, August 10, 2016 14:57:52 IST
Processing Success	Wednesday, August 10, 2016 14:57:57 IST
Sender Compliance Package Delivery Success	Thursday, August 11, 2016 04:13:43 IST
Receiver Compliance Package Delivery Success	Thursday, August 11, 2016 04:13:57 IST

If there were no errors, the invoice is now a Legal Invoice. You can view the signing information, as well as all other invoice information, in the Legal Invoices archive. For more information, see [“Active Invoices Archive” on page 135](#).

To view document details

- 1 On the Process Lifecycle page, click .
- 2 Click **List Document(s)**.
The List Documents page opens.
- 3 Do any of the following:

To view	Description
Process Lifecycle or related documents	Click an icon in the Document ID column to access the Process lifecycle and related documents.
Content of the data file(s) involved	<ol style="list-style-type: none"> 1 In the Translation section, click the Data and Models link. The Data nd Models dialog box opens. 2 Click Download to download the appropriate file.

To view	Description
	
	<p>3 On the List Documents page, click the applicable Invoice ID. The Process Lifecycle page opens for the invoice.</p>

To view Managed Service Platform details

Multiple Managed Service Platform entries might exist because transactions can pass through the Managed Service Platform at different stages of processing.

Managed Service Platform	
Date Received:	Wednesday, December 21, 2011 07:09:27 GMT
Sender:	LOGANOUT
Sender Ref:	10052807095T7D (F-6793653)
File Size:	87 Kbytes
Receiver:	LOGANAOUT
App Ref:	LOGANAOPFF

For example, in a transaction with no errors, the Managed Service Platform routes the file to a translator. Then, the translated output enters another Managed Service routing cycle for transmission to the recipient.

To view TGMS details

TGMS is the GXS network that enables data exchange with your partners. It manages your inbound and outbound transactions.

As with the Managed Service Platform, multiple TGMS sections might exist because transactions can pass through the TGMS, as well as Managed Services, at different stages of processing.

For example, this section displays when the transaction was received and routed to the translator.

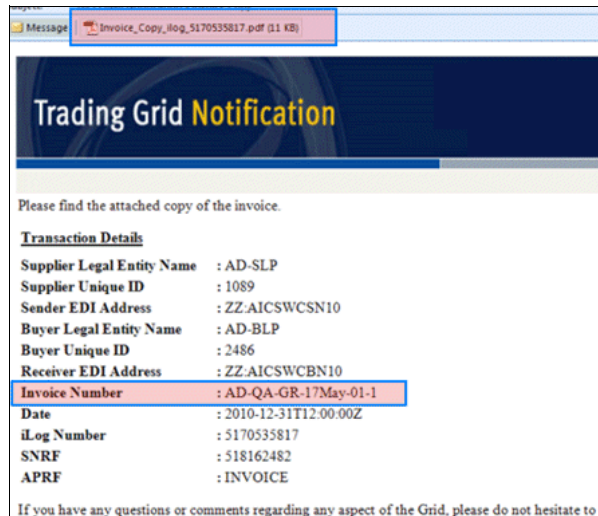
Trading Grid Messaging Service			
Sender:	ZZ:AICSWCSN10	Receiver:	ZZ:AICSWCBN101
Sender Ref:	546563723	App Ref:	INVOICE
ILog No.:	4187669866		
<hr/>			
Status History			
Received:	Wednesday, April 18, 2012 11:00:10 GMT		
Routed:	Wednesday, April 18, 2012 11:02:32 GMT	Service:	Active Invoice

Also see “Email Alerts” on page 133.

Email Alerts

Depending on your role (Buyer or Supplier) and the profile set up by your Company Administrator in the Legal Profile or profiles, you might receive some or all of the following email alerts. These alerts are notifications about the invoice validation and processing.

- **Invoice copy** — Email notification that includes an unsigned copy of the invoice. The invoice copy is in a readable PDF format. This copy is useful for workflow authorization or dispute resolution.



- **Invoice success** — For Suppliers only. Notification that the invoice successfully processed.

Trading Grid Notification

Invoice document is successfully processed by Active Invoice.

Transaction Details

Supplier Legal Entity Name : AD-SLP
 Supplier Unique ID : 1089
 Sender EDI Address : ZZ-AICSWCSN10
 Buyer Legal Entity Name : AD-BLP
 Buyer Unique ID : 2486
 Receiver EDI Address : ZZ-AICSWCBN10
 Invoice Number : AD-QA-GR-17May-01-1
 Date : 2010-12-31T12:00:00Z
 iLog Number : 5170535817
 SNRF : 518162482
 APRF : INVOICE

Regards,
 Grid Administrator

- **Invoice process failure** — For Suppliers only. Notification that errors were found in the invoice and processing stopped. You should correct the error(s) in the invoice and resubmit the invoice into the Trading Grid.

Trading Grid Notification

An error has been detected in active invoice processing an invoice document.

Transaction Details

Sender Legal Entity Name : VV-SLP1
 Sender VAT/TAX ID : 1010
 Sender EDI Address : ZZ-AICSWCSN10
 Receiver Legal Entity Name : VV-BLP1
 Receiver VAT/TAX ID : 2020
 Receiver EDI Address : ZZ-AICSWCBN10
 Invoice Number : INV-VJPROD-23JAN-7
 iLog Number : 1230646683
 SNRF : 123115757
 APRF : INVOICE

Errors

AIC_E003 : Invoice Date is/are mandatory.

Regards,
 Grid Administrator

Search for Invoices Using Active Invoices

This section explains how to find and view signed invoices, non-signed invoices, and credit notes in the Active Invoices Archive.

Active Invoices Archive

After an invoice is signed, it goes to the Active Invoices Archive. This archive provides an invoice history for auditing and legal purposes. It can contain copies of electronically signed and non-signed invoices from 6 to 20 years, as required by your country.

You can view the following for each active invoice:

- Invoice data in the Supplier's format.
- Signed or unsigned invoices in a readable PDF format.
- Signature and certificate details.
- Invoice processing history.
- Invoice audit history.

The database stores these documents for up to 20 years, according to your country's legal requirements.

To search for an invoice in the Active Invoices Archive

- 1 Click the **Reports** tab in Trading Grid Online.
 The Active Document Search page opens.
- 2 Select **Document**. Then click **Active Invoices**.

The screenshot shows the 'Reports' section of the Trading Grid Online interface. On the left is a sidebar with various report categories, with 'Active Invoices' highlighted. The main window is titled 'Active Documents Search' and contains several search filters:

- 'Select saved Searches' with a dropdown menu and 'OK'/'Delete' buttons.
- 'GXS Ref No' and 'My Address' text input fields.
- 'Mailbox' dropdown menu showing 'AAA62038'.
- 'Direction' dropdown menu showing 'Both sent and received'.
- 'Partner Name' and 'Partner Address' text input fields.
- 'Time Frame' dropdown menu showing 'Specific No. Of days'.
- 'Last "X" No. of Days From' section with input for '3' days, '00:00:00' time, and 'To: 0 20:37:04'.
- At the bottom, three radio buttons: 'File', 'Interchange', and 'Document' (which is selected).

The Search Archive page opens. From this page you can search for invoices in the Legal Archive, dated within the past 20 years.

Search Archive

Transaction Date Range

Time Frame: Specific Date Range ▼

From date: 2019-10-11 00:00:00 To date: 2019-10-10 23:59:59

Document Details

Order# i Deliver Note i

Document Type: Select ▼ Currency: Select ▼

None

Invoice# i

Invoice Number Range From To

Invoice List (Upload)# Browse... No file selected. i

Invoice Value(incd VAT) Select ▼

Invoice Value(excl VAT) Select ▼

Status Select ▼

Legal Profile - My Information

My Legal Entity Name/Unique ID My GLN Number

My VAT ID My Trade Register Number

My Legal Entity Address Select

Legal Profile - Partner Information

Partner Legal Entity Name/Unique ID Partner GLN Number

Partner VAT ID Partner Trade Register Number

Partner Legal Entity Address Select

* Role Type: (select one) ▼

Additional Search Filter

Select ▼

Extended Search Key as Sender i

Select Key Select ▼ Value: Add

Remove

Extended Search Key as Receiver i

Select Key Select ▼ Value: Add

Remove

Invoice Date Range

None

Start Date 00:00:00 End Date 23:59:59

Specific Date(s) Add Start Time: 00:00:00 End Time: 23:59:59

Remove

Last 'X' days Start Time: 00:00:00 End Time: 23:59:59

Software Version Select ▼

* View Type: (select one) ▼

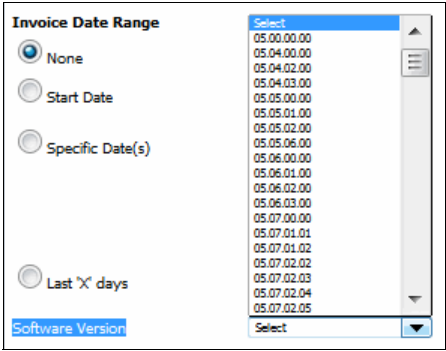
Search Clear

*Indicates mandatory

3 Set the search criteria.

Important: The **Transaction Date Range** section criteria is based on when GXS processed the document, whereas the **Invoice Date Range** is based on the date and time the invoice was created, as stated in the actual invoice document.

Field	Description
Transaction Date Range	
Time Frame	The date and time when the system received the invoice. There are five ways to search for documents by date: <ul style="list-style-type: none"> ■ Specific Date ■ Specific Date Range ■ Specific No. of days ■ Relative Time Range ■ None — search all available records.
From Date/To Date	Click the calendar icons to select the From Date and To Dates . Use the 24-hour clock format, such as 0:00 to 23:59.
Last "X" No. of Days	Specify the number of days back from the current date.
Document Details	
Order #	A unique number used to track an invoice.
Document Type	The document type, for example: Tax Invoice or Tax Credit Note .
Invoice Number	A unique number used to track an invoice.
Invoice Value	The total monetary amount of the invoice.
Invoice Number Range (From/To)	A range of Invoice Numbers for a search.
Invoice List (Upload)	Click Browse to upload an invoice.
Invoice Value (incl VAT)	The Invoice total including the VAT costs: <ul style="list-style-type: none"> ■ = (equal) ■ < (less than) ■ > (greater than) Example: \$100 before taxes.
Invoice Value (excl VAT)	The Invoice total without the VAT costs.
Status	Either All invoices, invoices With Errors , or invoices Without Errors .
Currency	The currency on which the invoice is based.
Legal Profile - My Information	
My Legal Name/Unique Entity ID	Use this section to look for invoices based on one or more legal profiles. Type the name or ID of the legal profile defined for your Company's entity, for example, factory, plant, division, sub-division, etc., or provide the other information as applicable.
Legal Profile - Partner Information	
Partner Legal Entity Name/Unique ID	The name or ID of the legal profile defined for the Trading Partner's entity.
Partner VAT ID	The VAT ID

Field	Description
Role Type	<p>The role of the legal entity or business unit</p> <ul style="list-style-type: none"> ■ Sender — Sends invoices only. ■ Receiver — Receives only. ■ Both — Sends and receives invoices. <p>Note: In the case of self-billing, a Buyer Receiver of documents might also send invoices. In this case, select Both.</p>
Additional Search Filter	<p>Additional search filter include the following:</p> <ul style="list-style-type: none"> ■ IPA Number ■ General Ledger Invoice Number (Sender) ■ Invoice External ID ■ Buyer Siret Number
Extended Search Key as Sender	See “Setup Extended Search Keys” on page 140.
Extended Search Key as Receiver	See “Setup Extended Search Keys” on page 140.
Invoice Date Range	
None	Search all available records.
Specific Date	The exact date for an invoice search.
Start Date	The start date for an invoice search.
End Date	The end date for an invoice search.
Last ‘X’ days	The number of days back from the current date.
Software Version	<p>The software version.</p> 
View Type	<ul style="list-style-type: none"> ■ Legal Archive — Search the entire archive. ■ Secure Delivery — Search for the securely delivered items to view, extract, open, or download. <p>The Secure Email Delivery feature delivered these documents through a secure email link. An email message with a secure link to the documents was sent to the person delegated in the Legal Profile by your Company Administrator, who then downloaded it to the Active Invoice Archive.</p> <p>Note: Documents received via Secure Email Delivery are retained for 180 days only.</p>

Field	Description
Back	Click Back to return to the Search Archive page.
Clear	To clear the search fields and start a new search, click Clear .

4 Click Search.

The system automatically saves the search query (on the Search Archive page), and the Invoice List page displays the search results.

The screenshot shows the 'Invoice List' window. At the top right, there are icons for CSV and printing. Below that is a row of radio buttons for actions: **Generate PDF** (selected), **Invoice Cancel**, **Download / Deliver**, **Print Invoice(s)**, and **Deliver Invoice Copy**. The main area is a table with the following columns: **Invoice No**, **Document Type**, **Currency**, **Invoice Amount(incl VAT)**, **Invoice Amount(excl VAT)**, and **Invoice Date**. The table contains three rows of data:

Invoice No	Document Type	Currency	Invoice Amount(incl VAT)	Invoice Amount(excl VAT)	Invoice Date
130282	CFDIv3.2	MXN	1200.00		Wednesday, August 17, 2016
130281	CFDIv3.2	MXN	1200.00		Tuesday, August 16, 2016
130280	CFDIv3.2	MXN	1200.00		Tuesday, August 16, 2016

At the bottom of the table, there is a pagination bar: « Previous 5 Items 1 to 5 of 126 Next 5 » View 5 items. Below the pagination bar are three buttons: **Save/Schedule Report**, **Save/Schedule Printable Report**, and **Back to Search**.

See also:

- ["Cancel an Invoice" on page 143.](#)
- ["Invoice Information Page" on page 164](#)
- ["Information Links" on page 166](#)
- ["Legal Entity Partner List" on page 170](#)
- ["Tax Exemption Justification Documents" on page 172](#)

Setup Extended Search Keys

You can create custom search keys that are relevant to your operation and configure the Active Documents Search page to allow users to search for information using secondary keys. Up to three extended search keys can be configured.

To configure an extended search key

- 1 Click the Reports tab in Trading Grid Online.
 The Active Documents Search page opens.

The screenshot shows the 'Reports' tab in Trading Grid Online. The main window is titled 'Active Documents Search'. On the left is a navigation panel with the following items: Search, Scheduled Reports, Delivered Reports, Transaction Summary, Status Reports, Trading Partnership Transaction, Inbound Reactivate, Standard Reports, and Active Invoices. The main content area contains the following search filters:

- Select saved Searches: [Dropdown] [OK] [Delete]
- GXS Ref No: [Text Input]
- Mailbox: [Dropdown: AAA62038]
- My Address: [Text Input]
- Direction: [Dropdown: Both sent and received]
- Partner Name: [Text Input]
- Partner Address: [Text Input]
- Time Frame: [Dropdown: Specific No. Of days]
- Last "X" No. of Days From: [Input: 3] [Time: 00:00:00] To: [Input: 0] [Time: 06:01:35]
- Search Level: File Interchange Document
- Application Reference: [Text Input]
- Sender Reference: [Text Input]
- ILog Number: [Text Input]
- Status: [Dropdown: All]
- Interconnect Name: [Dropdown: All]
- Mailbag ID: [Text Input]
- Translation Session Number: [Text Input]
- Original File Name: [Text Input]

At the bottom of the search area are 'Search' and 'Clear' buttons.

- 2 Select **Document** for the search Level.
- 3 Click **Active Invoices** in the Navigation Panel.

The Search Archive page opens.

Search Archive

Transaction Date Range

Time Frame: Specific Date Range ▼

From date: 2019-10-11 00:00:00 To date: 2019-10-10 23:59:59

Document Details

Order# Deliver Note

Document Type: Select ▼ Currency: Select ▼

None

Invoice# To

Invoice Number Range From To

Invoice List (Upload)# Upload... No file selected.

Invoice Value(Inc VAT) Select ▼

Invoice Value(Exc VAT) Select ▼

Status Select ▼

Legal Profile - My Information

My Legal Entity Name/Unique ID My GLN Number

My VAT ID My Trade Register Number

My Legal Entity Address Select

Legal Profile - Partner Information

Partner Legal Entity Name/Unique ID Partner GLN Number

Partner VAT ID Partner Trade Register Number

Partner Legal Entity Address Select

* Role Type: (select one) ▼

Additional Search Filter

Select ▼

Extended Search Key as Sender

Select Key Select ▼ Value: Add

Remove

Extended Search Key as Receiver

Select Key Select ▼ Value: Add

Remove

Invoice Date Range

None

Start Date 00:00:00 End Date 23:59:59

Specific Date(s) Add Start Time: 00:00:00 End Time: 23:59:59

Remove

Last 'X' days Start Time: 00:00:00 End Time: 23:59:59

Software Version Select ▼

* View Type: (select one) ▼

Search Clear

*Indicates mandatory

4 Set the basic search criteria, as applicable. See ["Active Invoices Archive"](#) on page 110.

5 Specify the **Role Type**, either **Sender**, **Receiver** or both.

Note: If **Sender** is selected, the **Extended Key Search as Receiver** fields are disabled (and vice-versa). If both are specified, both sections are enabled.

6 Select a key to configure from the **Select Key** drop-down menu.

7 Do one of the following:

- Type a value for the search in the **Value** field. This value can be anything, that is relevant to your operation, for example, a serial number, expiration date, or a specific term.
- Type a wildcard value (*). This value must include a leading and trailing asterick (*) .

8 Click **Add**.

The new key displays in the key list.

9 Select the View Type, either **Legal Archive** or Secure Delivery.

10 Click **Search**.

The Invoice List displays the search results.

Cancel an Invoice

Note: This feature may not be available, depending on your country, role, and permissions.

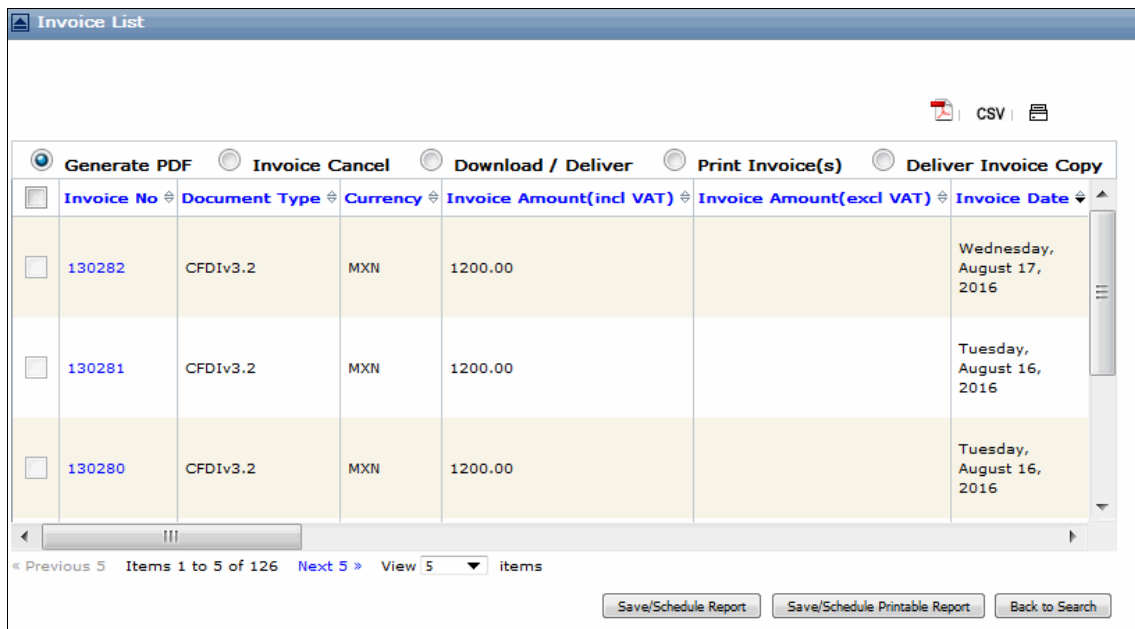
Important: Before cancelling an invoice, note the following.

- Invoices can only be cancelled by authorized users who are familiar with the local legislation, fiscal laws, and tax implications. If you want to cancel an invoice and are not authorized, contact your Administrator.
- After an invoice is cancelled, it cannot be retrieved.
- Depending on the legal requirements of your country, cancelling an invoice might not cancel all documents related to the invoice.

To cancel an archived invoice

- 1 Search for the invoice (or invoices) that you want to cancel. See [“Search for Invoices Using Active Invoices”](#) on page 135.

The Invoice List displays the search results.



<input type="checkbox"/>	Invoice No	Document Type	Currency	Invoice Amount(incl VAT)	Invoice Amount(excl VAT)	Invoice Date
<input type="checkbox"/>	130282	CFDIv3.2	MXN	1200.00		Wednesday, August 17, 2016
<input type="checkbox"/>	130281	CFDIv3.2	MXN	1200.00		Tuesday, August 16, 2016
<input type="checkbox"/>	130280	CFDIv3.2	MXN	1200.00		Tuesday, August 16, 2016

« Previous 5 Items 1 to 5 of 126 Next 5 » View 5 items

Save/Schedule Report Save/Schedule Printable Report Back to Search

- 2 Select **Invoice Cancel**.

The page refreshes, and the checkboxes for the uncanceled invoices in the list are enabled.

- 3 Click the checkbox for the invoices you want to cancel.
- 4 Click **Cancel Invoice**.

Invoice No	Document Type	Currency	Invoice Amount(incl VAT)	Invoice Amount(excl VAT)	Invoice Date
<input type="checkbox"/> 130282	CFDIv3.2	MXN	1200.00		Wednesday, August 17, 2016
<input type="checkbox"/> 130281	CFDIv3.2	MXN	1200.00		Tuesday, August 16, 2016
<input checked="" type="checkbox"/> 130280	CFDIv3.2	MXN	1200.00		Tuesday, August 16, 2016

« Previous 5 Items 1 to 5 of 126 Next 5 » View 5 items

Buttons: Cancel Invoice, Save/Schedule Report, Save/Schedule Printable Report, Back to Search

- 5 Click **OK** when prompted.
 The Invoice Cancellation page displays.

Invoice No	Cancellation Reason	Document Type	Currency	Invoice Amount(incl VAT)	Invoice Amount(excl VAT)
130280	Not Applicable	CFDIv3.2	MXN	1200.00	
130279	Not Applicable	CFDIv3.2	MXN	1200.00	

« Previous 5 Items 1 to 2 of 2 Next 5 » View 5 items

Buttons: Cancel Invoice

- 6 Click **Cancel Invoice**.
 The Invoice Cancellation page indicates the success or failure of the cancellation.

Invoice Number	Message
130279	Your request to cancel invoice is submitted successfully. You will receive an email confirmation once the invoices are processed.
130280	Your request to cancel invoice is submitted successfully. You will receive an email confirmation once the invoices are processed.

Attach Files to An Invoice

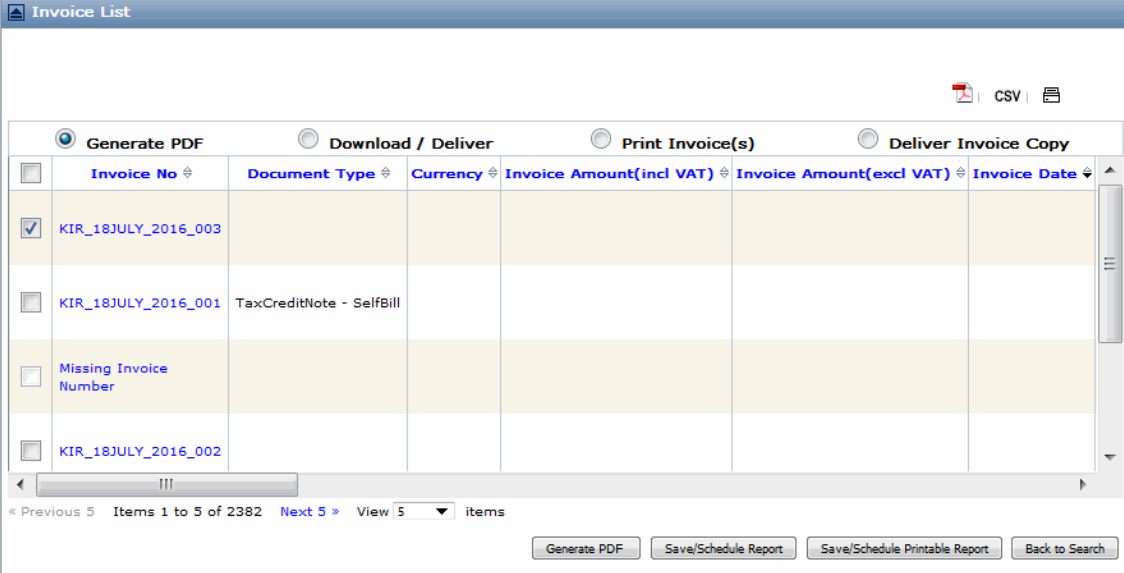
You can attach up to five files to an invoice, such as a customer quote, proof of delivery, proof of receipt, etc.

Note: Invoice attachments are typically for the benefit of a sender and visible only to OpenText customers.

To attach a file to an invoice

- 1 Search for the invoice. See [“Search for Invoices Using Active Invoices”](#) on page 135.

The Invoice List displays the search results.



The screenshot shows the 'Invoice List' window. At the top right, there are icons for CSV and a list. Below that are four radio buttons: 'Generate PDF' (selected), 'Download / Deliver', 'Print Invoice(s)', and 'Deliver Invoice Copy'. The main area is a table with the following columns: Invoice No, Document Type, Currency, Invoice Amount(incl VAT), Invoice Amount(excl VAT), and Invoice Date. The table contains four rows: 1. KIR_18JULY_2016_003 (checked), 2. KIR_18JULY_2016_001 TaxCreditNote - SelfBill, 3. Missing Invoice Number, 4. KIR_18JULY_2016_002. At the bottom, there is a pagination bar showing 'Items 1 to 5 of 2382' and a 'View 5 items' dropdown. Below the pagination are four buttons: 'Generate PDF', 'Save/Schedule Report', 'Save/Schedule Printable Report', and 'Back to Search'.

<input type="checkbox"/>	Invoice No	Document Type	Currency	Invoice Amount(incl VAT)	Invoice Amount(excl VAT)	Invoice Date
<input checked="" type="checkbox"/>	KIR_18JULY_2016_003					
<input type="checkbox"/>	KIR_18JULY_2016_001	TaxCreditNote - SelfBill				
<input type="checkbox"/>	Missing Invoice Number					
<input type="checkbox"/>	KIR_18JULY_2016_002					

- 2 Open the invoice.

The Invoice Information page displays.

- 3 Click **Upload Attachments**.

The Browse button is enabled.

Invoice Information

Invoice No:	KIR_18JULY_2016_003	Document Type:	
Your Legal Entity Unique ID:	0001_Test_Commercial_DV_S_ID	Partner Legal Entity Unique ID:	0001_Test_Commercial_DV_NR_ID
My VAT ID:		Partner VAT ID:	
Currency:		Invoice Amount(incl VAT):	
Invoice Date:		GXS Date:	18-Jul 10:23:55 IST
Function:	Original	Function Description:	

Archive Files(Sender)

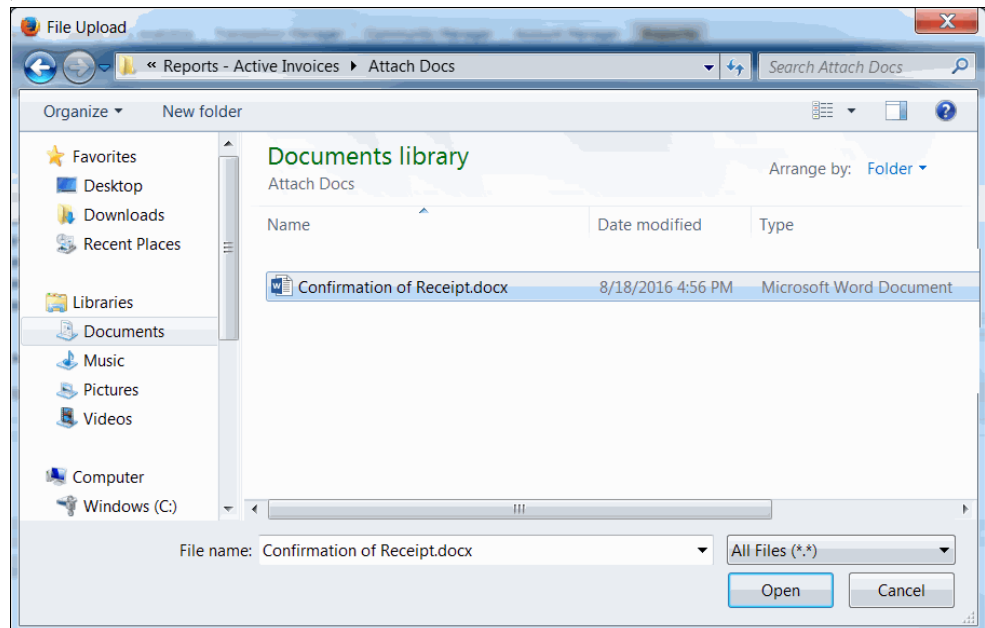
Original File	Download
---------------	----------

Browse... No file selected.

Submit Upload Attachments Clear

Back

4 Click **Browse**, and navigate to the file you want to upload.



5 Click **Open**.

The attachment is now attached to the invoice and accessible from the Invoice Information page.

The screenshot shows the 'Invoice Information' page. At the top, there is a header 'Invoice Information'. Below it, a table-like structure displays invoice details: Invoice No: KIR_18JULY_2016_002, Document Type: (blank), Your Legal Entity Unique ID: 0001_Test_Commercial_DV_S_ID, Partner Legal Entity Unique ID: 0001_Test_Commercial_DV_NR_ID, My VAT ID: (blank), Partner VAT ID: (blank), Currency: (blank), Invoice Amount(incl VAT): (blank), Invoice Date: (blank), GXS Date: 18-Jul | 10:09:00 IST, Function: Original, and Function Description: (blank). Below this is the 'Archive Files(Sender)' section, which contains two rows: 'Original File' with a 'Download' button, and 'Attachments' with a row for 'Attachment 1' also having a 'Download' button. At the bottom of the main content area are buttons for 'Submit', 'Upload Attachments', and 'Clear'. A 'Back' button is located at the bottom left of the page.

6 To open the attachment, click **Download** in the Attachments section.

This screenshot is similar to the previous one but includes a modal dialog box titled 'Opening Confirmation of Receipt.docx'. The dialog box contains the text: 'You have chosen to open: Confirmation of Receipt.docx which is: Microsoft Word Document from: https://qtg.qa.gxsonline.net'. It asks 'What should Firefox do with this file?' and provides three options: 'Open with Microsoft Word (default)' (selected), 'Save File', and 'Do this automatically for files like this from now on.' (unchecked). 'OK' and 'Cancel' buttons are at the bottom of the dialog. The background shows the same invoice information and attachment list as the previous screenshot.

7 Specify whether you want to open or save the file, and click **OK**.

Redeliver Invoices

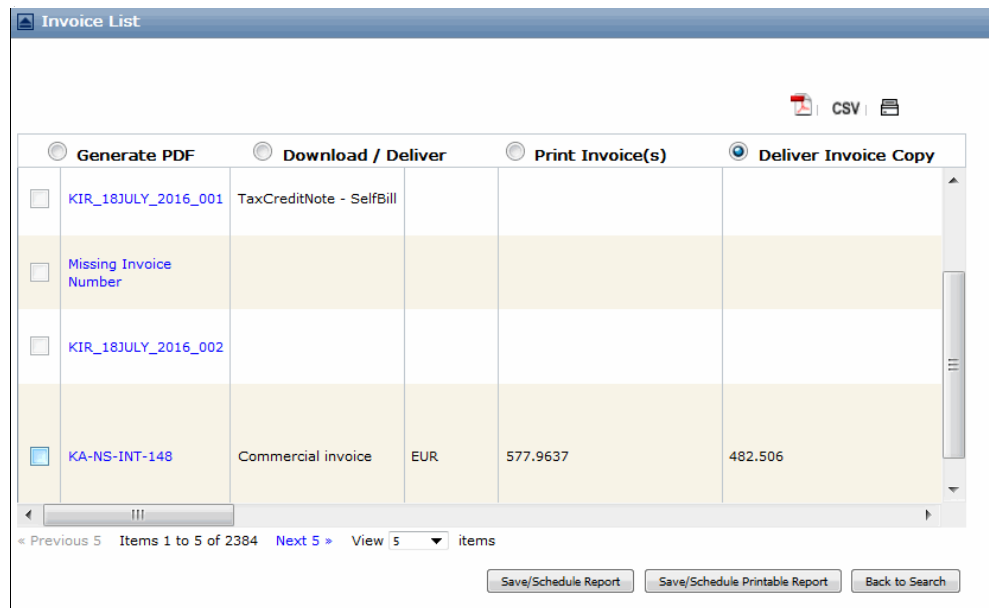
If a customer requests another copy of an invoice, you can redeliver a copy via email and secure email, as well as their TGO mailbox, as often as needed.

You can redeliver up to 100 invoices at a time. The system sends the invoice to the recipient through the same delivery method used in the initial delivery, such as email or secure email, and notifies the sender of the redelivery.

To redeliver an invoice

- 1 Search for the invoice that you want to redeliver. See [“Search for Invoices Using Active Invoices”](#) on page 135.

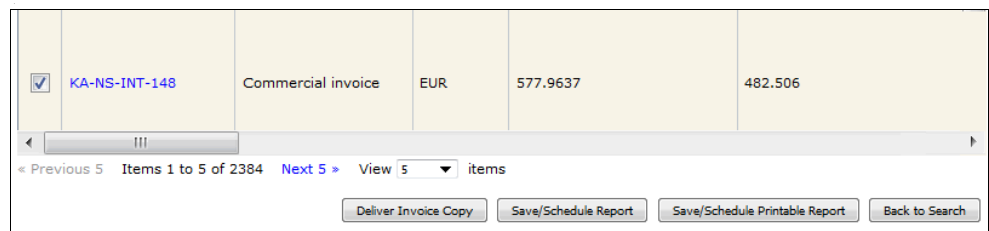
The Invoice List displays the search results.



- 2 Click **Deliver Invoice Copy**.

- 3 Click the checkbox for the invoice you want to deliver.

The **Deliver Invoice Copy** button displays.



- 4 Click **Deliver Invoice Copy**.

The **Deliver Invoice** page displays the invoice to be delivered.

Invoice No	Sender UniqueId	Receiver UniqueId	Invoice Date	Invoice Amount(incl VAT)	Invoice Amount(excl VAT)	Document Type
KA-NS-INT-148	KAINTNSSUP	KAINTNBUY	2017-08-01T00:00:00.000Z	482.506	577.9637	Commercial invoice

Buttons: Back To Invoice List, Deliver

5 Click Deliver.

The system resends the invoice to the recipient, based on the original delivery method, and a confirmation message displays.

• Following invoices are successfully submitted for invoice copy delivery to your partners. An email with the summary of status of delivery will be sent to you upon processing the same.

Invoice No	Sender UniqueId	Receiver UniqueId	Invoice Date	Invoice Amount(incl VAT)	Invoice Amount(excl VAT)	Document Type
KA-NS-INT-148	KAINTNSSUP	KAINTNBUY	2017-08-01T00:00:00.000Z	482.506	577.9637	Commercial invoice

Buttons: Back To Invoice List, Deliver

6 To return to the Invoice List, click Back to Invoice List.

Redelivery Notifications

The system notifies the sender by email when an invoice (or multiple invoices) is redelivered.

The examples below show two types of redelivery notifications.

GXS Email Notification - Active Invoice (Invoice Copy Delivery Summary) - Message (HTML)

Thu 2/11/2016 3:53 AM
 aic-iqa-notification@opentext.com
 GXS Email Notification - Active Invoice (Invoice Copy Delivery Summary)

To: @GXS AIC_QA

Trading Grid Notification

GXS Email Notification - Active Invoice (Invoice Copy Delivery Summary)

Following is the summary of Invoice Copy Delivery requested by you:

Delivery Requested Date: 2016-02-11 11:53:01 GMT+00:00

S.No	Invoice Number	Sender Legal Entity Name	Sender Unique ID	Date	Receiver Legal Entity Name	Receiver Unique ID	Invoice Copy Delivery Status	Comments
1	KA_NSHR_One100_Feb4__10064	KANSHRCUSTEMPSUP	KANSHRCUSTEMPSUP	2016-02-04T00:00:00	KANSHRCUSTEMPBUY	KANSHRCUSTEMPBUY	Delivered	
2	KA_NSHR_One100_Feb4__10061	KANSHRCUSTEMPSUP	KANSHRCUSTEMPSUP	2016-02-04T00:00:00	KANSHRCUSTEMPBUY	KANSHRCUSTEMPBUY	Delivered	
3	KA_NSHR_One100_Feb4__10075	KANSHRCUSTEMPSUP	KANSHRCUSTEMPSUP	2016-02-04T00:00:00	KANSHRCUSTEMPBUY	KANSHRCUSTEMPBUY	Delivered	

GXS Email Notification - Invoice...

Thu 2/11/2016 3:51 AM
 aic-iqa-notification@opentext.com
 GXS Email Notification - Invoice Copy

To: @GXS AIC_QA

Message: CASINO FREJUS CG820_KANSHRCUSTEMPBUY_US_WB ENTERTAINMENT FRANCE...

Receiver Legal Entity Name : KANSHRCUSTEMPBUY
Receiver Unique ID : KANSHRCUSTEMPBUY
Invoice Number : KA_NSHR_One100_Feb4__10090
Date : 2016-02-04T00:00:00

If you have any questions or comments regarding any aspect of the Grid, please do not hesitate to contact GXS Customer Support.

The following link provides contact information for all regions and services :
<http://www.gxs.com/support>

Regards,
 Grid Administrator

Note: This e-mail was generated by Trading GridSM Online. Replies to this e-mail will not be received.

GXS is a leading worldwide provider of business-to-business integration, synchronization and collaboration solutions.

The company operates a highly reliable, secure global network services platform enabling more than 40,000 businesses, including 75 percent of the Fortune 500, to conduct business together in real time.

GXS Trading GridSM Online: <https://qtg.qa.gxsonline.net/TigerPortal>

GXS Company Website: <http://www.gxs.com>

www.gxs.com 9711 Washingtonian Blvd., Gaithersburg, MD 20878
 Tel: +1 800-560-4347 * Tel: +1 301-340-4000

Send Multiple Invoices in a Batch

You can email up to 100 invoices as a batch, which can be up to 15MB in size. The system then processes and returns the batch invoices in the same order as originally received.

Note: This features applies only to Internal Archive Invoices.

- 1 Search for the invoice (or invoices) that you want to send. See [“Search for Invoices Using Active Invoices”](#) on page 135.

The Invoice List displays the search results.

The screenshot shows the 'Invoice List' interface with two invoices selected. The interface includes a toolbar with options: Generate PDF, Download / Deliver (selected), Print Invoice(s), and Deliver Invoice Copy. The table below shows the details of the selected invoices.

Invoice No	Document Type	Currency	Invoice Amount(incl VAT)	Invoice Amount(excl VAT)	Invoice Date	Invoice Creation Date
va-23Aug2016-01	TaxInvoice		330000.00		Tuesday, August 23, 2016	Tuesday, August 23, 2016 00:08:33 EDT
va-23Aug2016-01	TaxInvoice	CHF	330000.00		Tuesday, August 23, 2016	Tuesday, August 23, 2016 07:16:57 EDT

Navigation: Previous 5 Items 1 to 5 of 175 Next 5 View 5 Items

Buttons: Save/Schedule Report, Save/Schedule Printable Report, Back to Search

- 2 Click **Download/Deliver**.

- 3 Click the checkboxes for the invoices you want to send in a batch.

Notice that each time you click a checkbox, the **Total Download Size** displays at the top of the page.

The screenshot shows the 'Invoice List' interface with three invoices selected. The 'Total Download Size' is displayed as 320 KB. The interface includes a toolbar with options: Generate PDF, Download / Deliver (selected), Print Invoice(s), and Deliver Invoice Copy. The table below shows the details of the selected invoices.

Invoice No	Document Type	Currency	Invoice Amount(incl VAT)	Invoice Amount(excl VAT)	Invoice Date	Invoice Creation Date	Status
INT1-Aug17 Download Size: 103KB	Credit Note	CHF	330000.00		Monday, August 08, 2016	Wednesday, August 17, 2016 02:19:29 EDT	Sent
va-04Aug2016-01 Download Size: 110KB	TaxInvoice	CHF	330000.00		Thursday, August 04, 2016	Thursday, August 04, 2016 01:57:22 EDT	Sent
PR-01Aug2016-01 Download Size: 107KB	TaxInvoice	CHF	330000.00		Monday, August 01, 2016	Monday, August 01, 2016 06:09:34 EDT	Sent

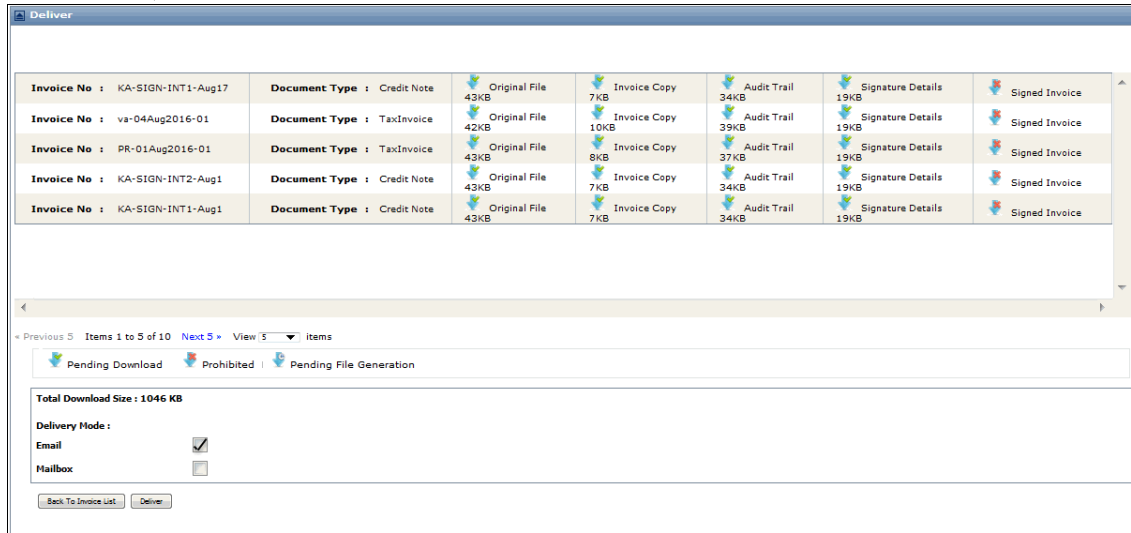
Total Download Size : 320 KB

Navigation: Previous 50 Items 1 to 50 of 175 Next 50 View 50 Items

Buttons: Download, Deliver, Save/Schedule Report, Save/Schedule Printable Report, Back to Search

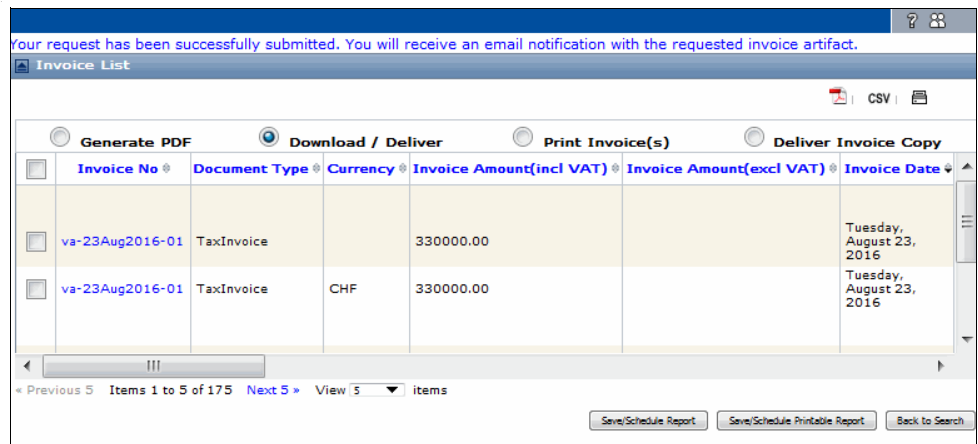
- 4 Click **Deliver**.

The Deliver page displays a list of the invoices to be sent as a batch and the total download size of the batch.



5 Click the checkbox for the delivery mode, either **Email** or **Mailbox**.

6 Click **Deliver**.



A confirmation message indicates if the delivery is successful.

Delivery Notifications

The system notifies the sender by email when a batch of invoice is delivered.

Invoice Batch Delivery Errors

If the invoices selected for batch delivery exceeds 15MB, the Deliver page displays an error message.

The screenshot shows a web interface titled "Deliver" with a table of invoice details. Below the table, there is a summary section with a red error message: "Total Download Size: 15511 KB Exceeds the Size Limit for Email Delivery." The delivery mode options "Email" and "Mailbox" are both unchecked.

Invoice No	Document Type	File	Original	Copy	Invoice	Audit	Signature	Signed	Attachments	
va-23Aug2016-01	TaxInvoice	File 42KB	Original	Copy 10KB	Invoice	Trail	Audit	Signature Details 19KB	Invoice Signed	
va-23Aug2016-01	TaxInvoice	File 42KB	Original	Copy 10KB	Invoice	Trail	Audit	Signature Details 19KB	Invoice Signed	Attachments 112KB
KA-SIGN-INT1-Aug22	Credit Note	File 43KB	Original	Copy 7KB	Invoice	Trail 34KB	Audit	Signature Details 19KB	Invoice Signed	
KA-SIGN-INT1-Aug19	Credit Note	File 43KB	Original	Copy 7KB	Invoice	Trail 34KB	Audit	Signature Details 19KB	Invoice Signed	
va-19Aug2016-02	TaxInvoice	File 42KB	Original	Copy 10KB	Invoice	Trail 37KB	Audit	Signature Details 19KB	Invoice Signed	

Navigation: Previous 5 Items 1 to 5 of 147 Next 5 View 5 items

Status: Pending Download, Prohibited, Pending File Generation

Total Download Size: 15511 KB Exceeds the Size Limit for Email Delivery.

Delivery Mode:

Email

Mailbox

Buttons: Back To Invoice List, Deliver

Upload Unrelated and Non-sequential Invoices

From the Search Archive page, you can search for invoices with non-sequential invoice numbers and upload them as .csv files.

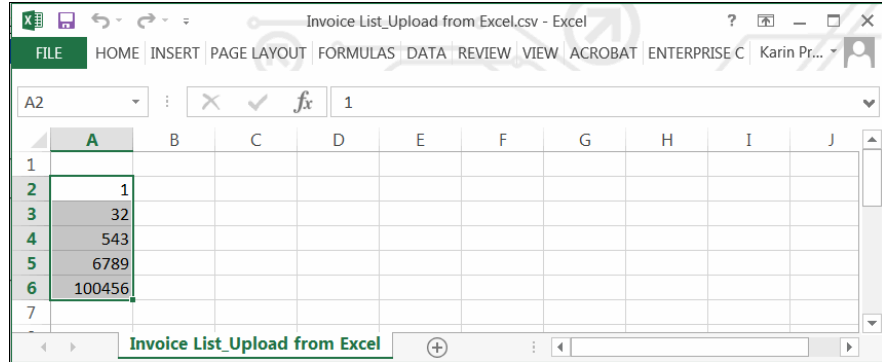
Search for Non-Sequential Invoices or Unrelated Invoices

When searching for these types invoices, specify a specific invoice number or range, for example, invoice numbers 100 to 200. You can also search for invoice numbers that are not sequential, for example, Invoice 1, Invoice 542, Invoice 10137, etc.

Then, instead of having to perform multiple queries, you can upload a list of unrelated, non-sequential invoices in a comma delimited value (csv) file to the search page.

- 1 Create a list of invoices, and save it as a .csv file.

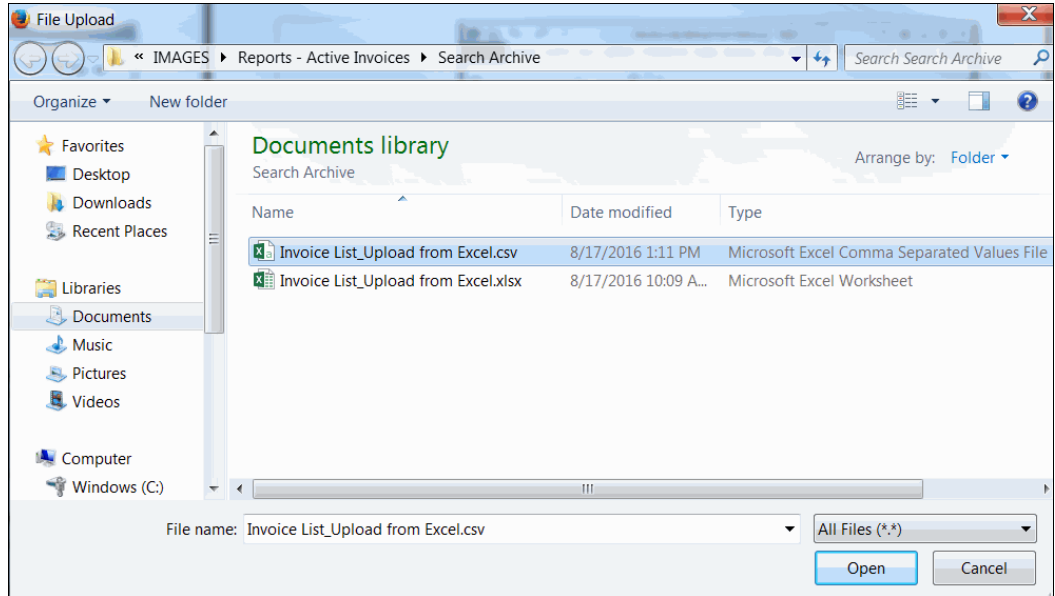
Note: The list can contain up to 500 invoices.



2 Select **Invoice List** on the Search Archive page.

The screenshot shows the "Search Archive" page. The "Transaction Date Range" section has "Time Frame" set to "Specific Date Rang", "From date" as "2015-08- 00:00", and "To date" as "2016-08- 23:59". The "Document Details" section includes fields for "Order #", "Deliver Note", "Document Type", "Currency", "Invoice #", "Invoice Number Range From", "Invoice List (Upload) #", "Invoice Value(ind VAT)", "Invoice Value(exd VAT)", and "Status". The "Invoice List (Upload) #" field is selected with a radio button and has a "Browse..." button next to it, with the text "No file selected." below it.

3 Click **Browse**, and specify the location of the .csv file to upload.



The invoices display in the Invoice List.

Note: You can also use the text field with comma separators to search for multiple invoices or type '*' for a wild card search, for example *, *ABC or *ABC*.

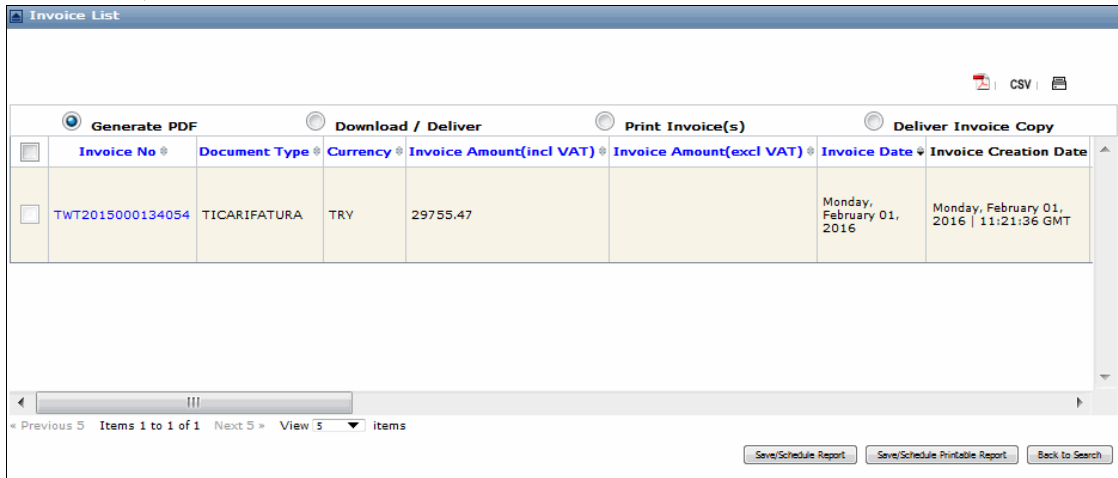
Format Non-Invoice XML Files

This feature allows you to view and download HTML representations of the following types of documents:

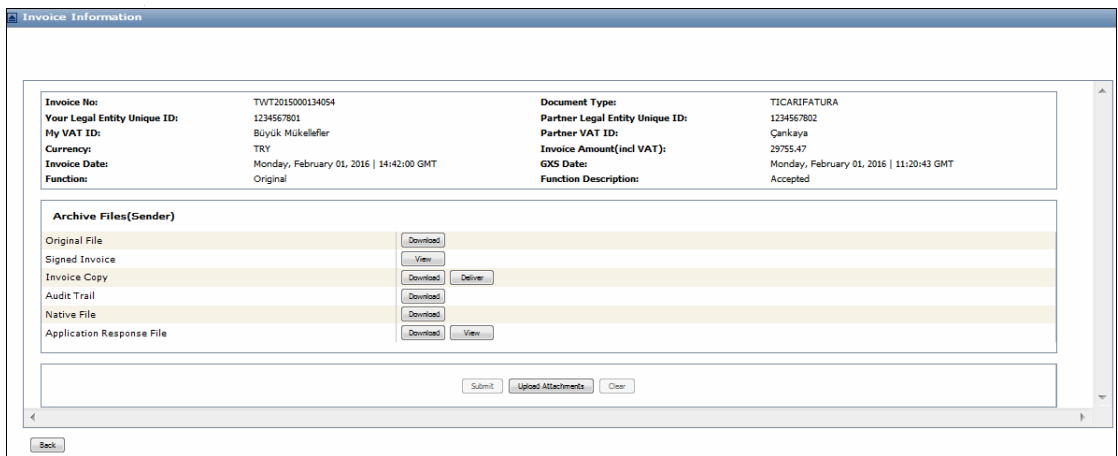
- Timestamp Files
- Government Sent Responses
- Failed Delivery Notice Acknowledgements
- Deadline Passed Notice Acknowledgements
- Delivery Receipt Acknowledgements
- Rejection Notice Acknowledgements
- Transmission Notice Acknowledgements
- Outcome Notice Acknowledgements
- Application Responses
- Cancelled Acknowledgements

To non-invoice XML files

- 1 Search for the invoice you want to format.
 The Invoice List displays the requested invoice.



- 2 Click the invoice in the list.
 The Invoice Information page displays.



- 3 Click **View**.
 The Application Response page displays the formatted invoice information.
 Below are examples formatted non-invoices XML files.

Example TimeStamp File:

The screenshot shows the 'Invoice Information' page in the Trading Grid Online system. The invoice details are as follows:

Invoice No:	VA_B2GIT_V5.18-0A	Document Type:	FATTURAPA
Your Legal Entity Unique ID:	B2GITALYSUPP1	Partner Legal Entity Unique ID:	B2GITALYNGBUY1
My VAT ID:	04183910159	Partner VAT ID:	00212840235
Currency:	EUR	Invoice Amount (incl VAT):	3
Invoice External Id:	65115	Government Receive Date:	Monday, December 21, 2015 06:56:04 GMT
Invoice Date:	Monday, December 21, 2015 00:00:00 GMT	GXS Date:	Monday, December 21, 2015 06:45:08 GMT
Function:	Original	Function Description:	

The 'Archive Files(Sender)' section lists several files with 'Download' and 'View' buttons. A pop-up window titled 'Italian Time Stamp' is open, displaying the following XML data:

```

SdIDescription
ID : 00000000-0000-0000-0000-00000000AF01
CreatingApplication
Name Active Invoice With Compliance
Version 5.17
Producer OpenText
VdC
ID : 00000000-0000-0000-0000-00000000AF01
VdCGroup
Label :
Process
Agent Role: Preservation/Manager Type: person
AgentName
First Name: Vanni
Last Name: C
Formal Name:
Agent ID Scheme: TaxCode
1110
Agent Role: Delegate Type: organization
AgentName
First Name:
Last Name:
Formal Name: TrustWeaver AB
    
```

Example Government Sent Response

The screenshot shows the 'Invoice Information' page in the Trading Grid Online system, displaying the same invoice details as the previous example. The 'Archive Files(Sender)' section now includes a 'Government Sent Response' file with a 'Download' and 'View' button. A pop-up window titled 'Govt Response' is open, displaying the following XML data:

```

Govt Response
Body
rispostaSdIRicevifile
IdentificativoSDI : 65115
DataOraRicezione : 2015-12-21T12:26:04.223+05:30
    
```

Example Delivery Receipt

The screenshot displays the OPENTEXT Trading Grid Online interface. The top navigation bar includes 'Operations Center', 'Active Documents', 'Transaction Manager', 'Community Manager', 'Account Manager', and 'Reports'. The left sidebar contains various report categories like 'Search', 'Scheduled Reports', 'Delivered Reports', 'Transaction Summary', 'Status Reports', 'Trading Partnership Transaction', 'Inbound Reactivate', 'Active Invoices', 'Search Archive', 'Legal Entity Partner List', 'Download Status Report', and 'Reprocess Duplicate Invoices'. The main content area is titled 'Invoice Information' and contains the following data:

Invoice No:	VA_B2017_V5-18-04	Document Type:	FATTURAPA
Your Legal Entity Unique ID:	8301TALYSURP1	Partner Legal Entity Unique ID:	8301TALYNGBU1
My VAT ID:	04103910159	Partner VAT ID:	00212840235
Currency:	EUR	Invoice Amount (incl VAT):	3
Invoice External Id:	65115	Government Receive Date:	Monday, December 21, 2015 06:56:04 GMT
Invoice Date:	Monday, December 21, 2015 00:00:00 GMT	GXS Date:	Monday, December 21, 2015 06:45:08 GMT
Function:	Original	Function Description:	

Below the invoice information, there are sections for 'Archive Files (Sender)', 'Acknowledgement File(s)', and 'Attachments'. The 'Archive Files (Sender)' section lists various files with 'Download' and 'View' buttons. The 'Acknowledgement File(s)' section lists 'Government Sent Response', 'Delivery Receipt', 'Failed Delivery Notice', 'Rejection Notice', 'Outcome Notice', 'Deadline Passed Notice', and 'Transmission Notice', each with 'Download' and 'View' buttons. The 'Attachments' section shows 'Attachment 1' with a 'Download' button.

At the bottom of the interface, a browser window displays a PDF document titled 'Ricevuta Consegna'. The PDF content is as follows:

File con firma elettronica - Versione 1.0

Ricevuta Consegna

Identificativo SdI: 31694579
 Nome File: IT04183910159_00bNe.xml
 Data Ora Ricezione: 2016-02-18T08:09:48.000+01:00
 Data Ora Consegna: 2016-02-18T08:09:56.000+01:00
 Destinatario: UF4CAO Azienda Ospedaliera Universitaria OO.RR. San Giovanni di Dio e Ruggi d'Aragona - Uff. eFatturaPA
 Message Id: 218268723
 Note: Per monitorare lo stato del file vai al seguente indirizzo:
<https://sdi.fatturapa.gov.it/Sdi2FatturaPAWeb/DettaglioIdSdi.do?id=31694579&p=06339fd4-5f79-4fdc-9>

Example Failed Delivery Notice

DPENTEXT™ Trading Grid Online Logged in as: HC_B2GITAL
Thursday, September 03, 2015

Operations Center | Active Documents | Transaction Manager | Community Manager | Account Manager | **Reports**

Search Invoice Information

Scheduled Reports
 Delivered Reports
 Transaction Summary
 Status Reports
 Trading Partnership Transaction
 Inbound Reactivate
Active Invoices
 Search Archive
 Legal Entity Partner List
 Download Status Report
 Reprocess Duplicate Invoices

Invoice No:	VA_B2GIT_V5.18-0A	Document Type:	FATTURARA
Your Legal Entity Unique ID:	B2GITALYSURP1	Partner Legal Entity Unique ID:	B2GITALYNGBU1
My VAT ID:	04183910159	Partner VAT ID:	00212840235
Currency:	EUR	Invoice Amount (incl VAT):	3
Invoice External Id:	55115	Government Receive Date:	Monday, December 21, 2015 06:56:04 GMT
Invoice Date:	Monday, December 21, 2015 00:00:00 GMT	GXS Date:	Monday, December 21, 2015 06:45:08 GMT
Function:	Original	Function Description:	

Archive File(s) (Sender)	Download	View
Original File	Download	View
Signed Invoice	Download	View
Invoice Copy	Download	Deliver
Timestamp File	Download	View
Native File	Download	
Government Sent Response	Download	View
Delivery Receipt	Download	View
Failed Delivery Notice	Download	View
Rejection Notice	Download	View
Outcome Notice	Download	View
Deadline Passed Notice	Download	View
Transmission Notice	Download	View

Acknowledgement File(s)

Attachments

Attachment 1 [Download](#)

[Submit](#) | [Upload Attachments](#) | [Clear](#)

<https://qtg.qa.gxsonline.net/aicweb/InvoiceInfoAction.do?method=viewXMLFile&fmsUri=fileID^3b8c8e2e-9fb4-42dc-b393-fd665fe251bc--dataStore^CSI--appID^...>

<https://qtg.qa.gxsonline.net/aicweb/InvoiceInfoAction.do?method=viewXMLFile&fmsUri=fileID^3b8c8e2e-9fb4-42dc-b393-fd665fe251bc>

File con firma elettronica - Versione 1.0

Notifica Mancata Consegna

Identificativo Sdi: 31485401
 Nome File: 1704183910159_00bFn.xml
 Data Ora Ricezione: 2016-02-17T06:32:53.000+01:00
 Descrizione: Non è stato possibile recapitare la fattura/e al destinatario. Sono in corso le necessarie verifiche, al termine delle quali si procederà ad un nuovo tentativo di trasmissione. Si rimanda pertanto ad un momento successivo l'invio della ricevuta di consegna.
 Message Id: 216934730

Example Rejection Notice

OPENTEXT™ Trading Grid Online Logged in as HC_B2GIT7
Thursday, September 21, 2016

Operations Center Active Documents Transaction Manager Community Manager Account Manager **Reports**

Search

Invoice Information

Invoice No:	VA_B2GIT_V5-19-04	Document Type:	FATTURAPA
Your Legal Entity Unique ID:	B2GITVLSURP1	Partner Legal Entity Unique ID:	B2GITVLYNOBUY1
My VAT ID:	04183910159	Partner VAT ID:	00212840235
Currency:	EUR	Invoice Amount (incl VAT):	3
Invoice External Id:	65115	Government Receive Date:	Monday, December 21, 2015 06:56:04 GMT
Invoice Date:	Monday, December 21, 2015 00:00:00 GMT	GKS Date:	Monday, December 21, 2015 06:45:08 GMT
Function:	Original	Function Description:	

Archive Files (Sender)

Original File	Download	View
Signed Invoice	Download	Deliver
Invoice Copy	Download	View
Timestamp File	Download	View
Native File	Download	

Acknowledgement File(s)

Government Sent Response	Download	View
Delivery Receipt	Download	View
Failed Delivery Notice	Download	View
Rejection Notice	Download	View
Outcome Notice	Download	View
Deadline Passed Notice	Download	View
Transmission Notice	Download	View

Attachments

Attachment 1	Download
--------------	----------

Submit Upload Attachments Clear

https://qtg.qa.gxsonline.net/aicweb/InvoiceInfoAction.do?method=viewXMLFile&fmsUri=fileID^acc71219-894f-4874-af84-011f57...
 https://qtg.qa.gxsonline.net/aicweb/InvoiceInfoAction.do?method=viewXMLFile&fmsUri=fileID^acc71219-894f...

File con firma elettronica - Versione 1.0

Notifica Scarto

Identificativo Sdi: 31695665
 Nome File: IT04183910159_00bRY.xml
 Data Ora Ricezione: 2016-02-18T08:28:34.000+01:00
 Message Id: 218272008

Lista errori

Codice	Descrizione
00311	Codice Destinatario non valido - codiceDestinatario non trovato

Example Outcome Notice

PENTEXT™ Trading Grid Online Logged in as: HC_B2GITAL
Thursday, September 01, 2017

Operations Center Active Documents Transaction Manager Community Manager Account Manager Reports

Search Invoice Information

Invoice No:	VA_82027_Y5-19-0A	Document Type:	FATTURAPA
Your Legal Entity Unique ID:	8305TALY5L8P1	Partner Legal Entity Unique ID:	8305TALYNG8U1
My VAT ID:	04103910159	Partner VAT ID:	0021840235
Currency:	EUR	Invoice Amount(ind VAT):	3
Invoice External Id:	65115	Government Receive Date:	Monday, December 21, 2015 06:56:04 GMT
Invoice Date:	Monday, December 21, 2015 00:00:00 GMT	GXS Date:	Monday, December 21, 2015 06:45:08 GMT
Function:	Original	Function Description:	

Archive Files(Sender)

Original File	Download	
Signed Invoice	View	
Invoice Copy	Download	View
Timestamp File	Download	View
Native File	Download	

Acknowledgement File(s)

Government Sent Response	Download	View
Delivery Receipt	Download	View
Failed Delivery Notice	Download	View
Rejection Notice	Download	View
Outcome Notice	Download	View
Deadline Passed Notice	Download	View
Transmission Notice	Download	View

Attachments

Attachment 1	Download
--------------	----------

Submit Upload Attachments Clear

https://qtg.qa.gxsonline.net/aicweb/InvoiceInfoAction.do?method=viewXMLFile&fmsUri=fileID^ffa2c63a-b392-43f5-ad13-83d754ca461f-...
https://qtg.qa.gxsonline.net/aicweb/InvoiceInfoAction.do?method=viewXMLFile&fmsUri=fileID^ffa2c63a-b392-43f5-...

File con firma elettronica - Versione 1.0

Notifica Esito

Identificativo Sdi: **31694467**
 Nome File: **IT04183910159_00bMX.xml**
 Message Id: **218285705**

Esito Committente
 identificativo Sdi: **31694467**

Riferimento Fattura

Numero Fattura: **16018919**
 Anno Fattura: **2016**

Esito: **EC01** (Accettazione)

Example DeadLine Passed Notice

The screenshot displays the OPENTEXT Trading Grid Online interface. The top navigation bar includes 'Operations Center', 'Active Documents', 'Transaction Manager', 'Community Manager', 'Account Manager', and 'Reports'. The left sidebar contains various report categories like 'Scheduled Reports', 'Delivered Reports', 'Transaction Summary', 'Status Reports', 'Trading Partnership Transaction', 'Inbound Reactivate', 'Active Invoices', 'Search Archive', 'Legal Entity Partner List', 'Download Status Report', and 'Reprocess Duplicate Invoices'. The main content area is titled 'Invoice Information' and shows details for an invoice with the number 'VA_82017_VS-10-04'. It lists various IDs, currency (EUR), invoice date (Monday, December 21, 2015), and function (Original). Below this, there are sections for 'Archive Files (Sender)', 'Acknowledgement File(s)', and 'Attachments'. The 'Acknowledgement File(s)' section contains a table with columns for file name and actions (Download, View). One of the entries is 'Deadline Passed Notice', which is highlighted in red. Below the table, there are two browser address bars showing the URL: <https://qtg.qa.gxsonline.net/aicweb/InvoiceInfoAction.do?method=viewXMLFile&fmsUri=fileID^cbbe8e46-7db0-45f2-9917-a16957414189~dataStore^CSI~appID...> and <https://qtg.qa.gxsonline.net/aicweb/InvoiceInfoAction.do?method=viewXMLFile&fmsUri=fileID^cbbe8e46-7db0-45f2-9917-a16957414189>. At the bottom, a white box contains the following text:

File con firma elettronica - Versione 1.0

Notifica Decorrenza Termini

Identificativo SdI: 30139776
 Nome File: IT04183910159_00ZC4.xml
 Descrizione: Il processo di gestione della fattura/e in oggetto si ritiene concluso per decorrenza dei termini previsti per la notifica dell'esito da parte dell'amministrazione destinataria
 Message Id: 218182319
 Note: Se l'Identificativo SdI si riferisce ad un lotto, la decorrenza termini riguarda tutte le fatture del lotto ad eccezione di quelle per le quali si e' gia' trasmesso esito (di accettazione o rifiuto).

Example Application Response File

The screenshot shows the GXS Trading Grid Online interface. The main window displays 'Invoice Information' for invoice number TWT2015000134054. The 'Archive Files(Sender)' section lists several files, with 'Application Response File' highlighted. A 'View' button next to this file is highlighted with a red box. Below the main window, a browser window displays the XML content of the application response file.

Invoice Information:

Invoice No:	TWT2015000134054	Document Type:	TICARIFATURA
Your Legal Entity Unique ID:	1234567801	Partner Legal Entity Unique ID:	1234567802
My VAT ID:	Buyuk Mükellefler	Partner VAT ID:	Çankaya
Currency:	TRY	Invoice Amount(incl VAT):	29755.47
Invoice Date:	Monday, February 01, 2016 14:42:00 GMT	GXS Date:	Monday, February 01, 2016 11:20:43 GMT
Function:	Original	Function Description:	Accepted

Archive Files(Sender):

Original File	Download
Signed Invoice	View
Invoice Copy	Download
Audit Trail	Download
Native File	Download
Application Response File	Download View

Application Response XML:

```

UBLVersionID: 2.1
ProfileID: TICARIFATURA
UID: 35ef8550-f9c0-4751-a9fe-9771c3e6f9b9
IssueDate: 2016-02-02
IssueTime: 14:50:26.6880840+02:00
Note:
Signature
ID_schemelD: VKN_TCKN
1234567802
SignatoryParty
WebsiteURI
PartyIdentification
ID_schemelD: VKN
1234567802
PartyName
Name: BBIB Limited Şirketi
PostalAddress
ID: 1234567890
StreetName: İhlamur Mahallesi Selvi Caddesi Sedir Sokak
BuildingNumber: 75/A
CitySubdivisionName: Kızılay
CityName: Ankara
PostalZone: 06100
Country
IdentificationCode: TR
Name: Türkiye
PartyTaxScheme
Name: Çankaya
    
```

Example Cancelled Acknowledgement

The screenshot shows the GXS Trading Grid Online interface. The main window displays 'Invoice Information' for invoice number 7305. The 'Archive Files(Sender)' section lists several files, with 'Cancel Signed File' highlighted. A 'View' button next to this file is highlighted with a red box. Below the main window, a browser window displays the XML content of the cancelled acknowledgement file.

Invoice Information:

Invoice No:	7305	Document Type:	CFDIv3.2
Your Legal Entity Unique ID:	AAA010101AAA	Partner Legal Entity Unique ID:	AAA010102AAA
My VAT ID:		Partner VAT ID:	
Currency:	USD	Invoice Amount(incl VAT):	1722.15
Invoice Date:	Wednesday, March 09, 2016 01:01:37 GMT	GXS Date:	Thursday, March 10, 2016 06:22:46 GMT
Function:	Original	Function Description:	Cancelled

Archive Files(Sender):

Original File	Download
Signed Invoice	View
Invoice Copy	Download
Audit Trail	Download
Cancel Signed File	Download View

Cancelled Acknowledgement XML:

```

Acuse Fecha: 2016-03-09T01:01:37 RfcEmisor: AAA010101AAA
Folios
UID : 733A7143-370E-48BD-81EA-A4E6E9EE4162
EstatusUID : 201
    
```


Invoice Information Page

The Invoice Information page differs for Buyers and Suppliers, and differs if the invoice is a signed or non-signed EDI invoice, or a Credit Note.

This page is accessed from the Invoice Archive - Search Results page. See [“Search for Invoices Using Active Invoices”](#).

Signed Invoices

The following Invoice Information page is for a Signed Invoice.

Invoice Information

Invoice No:	MITIQA-Apr23-01	Invoice Type:	TaxInvoice
Your Legal Entity Unique ID:	MITSIGBLP1	Partner Legal Entity Unique ID:	MITSIGSLP1
Currency:	CHF	Invoice Amount:	330000.00
Invoice Date:	Monday, April 23, 2012 12:21:23 GMT	GXS Date:	Monday, April 23, 2012 04:58:45 GMT
Function:	ORIGINAL	Function Description:	

Archive Files(Buyer)

Original File	Download
Validated Signed Invoice	View Revalidate
Invoice Copy	Download
Audit Trail	Download
Validation Report	Download

Back

Non-signed EDI Invoices

The example below shows the Invoice Information page is for a Non-Signed Invoice.

Invoice Information

Invoice No:	VV-INV-021	Invoice Type:	Commercial invoice
Your Legal Entity Unique ID:	MICHSUP1	Partner Legal Entity Unique ID:	MICHBUY1
Currency:	EUR	Invoice Amount:	105692.08
Invoice Date:	Jul 08, 2011 05:30:00 IST	GXS Date:	Jul 08, 2011 17:56:02 IST
Function:	ORIGINAL	Function Description:	

Archive Files(Supplier)

Original File	Download
Tax Exemption Justifying Document	Download
Summary List	Download
Audit Trail	Download

Send PDFs to AIC

If authorized by your System Administrator, users can send PDFs created on their system directly to AIC for signing and storing.

Authorize AIC to receive and sign PDFs

Note: The System Administrator must set the following:

- In the Account Manager: Service Configuration page, set the subscription package to **Active Invoice Sign Incoming File-Sender** for the subscription.
- Set the Process Type to **Active Invoice Sign Input** in the Legal Profile section.

Account Manager: Service Configuration

Company Profile

User Management

Trading Community

Subscription

Service Configuration

Mailbox and EDI Address

Service Contacts

Legal Profile

Legal Profile Bulk Upload

Legal Entity Relationship Bulk Upload

Event Management

Import Mailbox

Mailslot

Billing

Policy

Community Report

GLN :	<input type="text"/>	Vat Id :	<input type="text"/>
Trade Register Number :	<input type="text"/>	Alias :	<input type="text"/>
Taxcom Id :	<input type="text"/>		

Contact Information

First Name :	<input type="text"/>	Last Name :	<input type="text"/>
Email :	<input type="text"/>	Phone :	<input type="text"/>
Locale :	English	Time Zone :	(GMT +01:00) Atlantic <input type="checkbox"/> Daylight savings time observed

Select	Default	Contact Id	First/Given Name	Last/Family Name	Locale	Email
<input type="checkbox"/>	<input checked="" type="radio"/>	32862	vani	c	English	vani.c@gxs.com

Process Selection

* Process Type :

Active Invoice Sign Input
 Active Invoice Non-Signed
 Active Invoice Sign

Digital Signature Information

Domestic	Cross Border
Document Format: PDF	Document Format: PDF
Sign Format: PDF	Sign Format: PDF
Job Type: CADESA	Job Type: CADESA

Select | Update Digital Signature Information

Exception Rules :

Receiver Legal Entity Unique Id :

Process Type :

Below is an example of the subscription required for this feature.

Community Manager: Subscription	
<input type="checkbox"/>	DQC Nestle
<input type="checkbox"/>	Active Documents - TGMS Support
<input type="checkbox"/>	Active Invoice Sign with Duplicate Check-Sender(Govt Approval Reqd)
<input type="checkbox"/>	Active Invoice Archive Signed File with Duplicate Check-Sender(Govt Approval Reqd)
<input type="checkbox"/>	Active Invoice Non Signed EDI SP
<input type="checkbox"/>	Active Invoice Validate File with Unsigned PDF container
<input type="checkbox"/>	Active Invoice Archive Validated File with Unsigned PDF container
<input type="checkbox"/>	Active Invoice Validate File with Signed PDF container
<input type="checkbox"/>	Active Invoice Archive Validated File with Signed PDF container
<input type="checkbox"/>	Active Documents - Document Search
<input type="checkbox"/>	Active Invoice Non Sign With Human Readable Image Without Duplicate Check-Sender
<input type="checkbox"/>	Active Invoice Archive for Non Sign With Human Readable Image Without Duplicate Check-Sender
<input checked="" type="checkbox"/>	Active Invoice Sign Incoming File-Sender
<input checked="" type="checkbox"/>	Active Invoice Archive for Sign Incoming File-Sender
<input type="checkbox"/>	Active Invoice Non Signed Process with Unsigned PDF container for Receiver
<input type="checkbox"/>	Active Invoice Archive Non Signed Documents with Unsigned PDF container for Receiver
<input type="checkbox"/>	Active Invoice Non Signed Process with Unsigned PDF container for Sender
<input type="checkbox"/>	Active Invoice Archive Non Signed Documents with Unsigned PDF container for Sender
<input type="checkbox"/>	Active Invoice Validate with Duplicate Check and TP Report List
<input type="checkbox"/>	Active Invoice Archive Validated File with Duplicate Check and TP Report List
<input type="checkbox"/>	Active Invoice Sign File With Duplicate Check-Sender
<input type="checkbox"/>	Active Invoice Archive Signed File With Duplicate Check-Sender
<input type="checkbox"/>	Active Invoice Non Signed Process Without Duplicate Check-Sender
<input type="checkbox"/>	Active Invoice Archive Non Signed Documents Without Duplicate Check-Sender
<input type="checkbox"/>	Disable Hub Document Delivery from Trading Partners
<input type="checkbox"/>	Data Entitlement Service
<input type="checkbox"/>	Active Documents - Interchange Search
<input type="checkbox"/>	Active Documents - Document Level Tracking
<input type="checkbox"/>	ReportsPkg
<input checked="" type="checkbox"/>	Files and Documents Search
<input type="checkbox"/>	DQC

Important: When AIC receives the data and creates the PDF, it validates that all of the incoming data is legal and compliant. To create a legal invoice, AIC reviews the data and makes sure that all mandatory fields are complete, then creates the PDF. If a user sends the PDF, AIC cannot validate the content or open the PDF to make sure all mandatory fields are completed.

Process EDI Batch Files as Signed EDI Invoices

AIC supports multiple invoice signing and validation processes.

EANCOM Signature Rules

This feature supports the following EANCOM signature rules:

- EANCOM-IDEAL-EVIDENCE
- EANCOM-AECOC-EVIDENCE
- EANCOM-GS1AT-EVIDENCE
- EANCOM-GS1AT2-EVIDENCE

Information Links

The Invoice Information page differs depending on if you are Buyer or Supplier and if the invoice is a signed invoice or a non-signed EDI invoice, or a credit note. You might not see all of the following information

- For the **Original File**: Click **Download** to download, or view, a version of the original unsigned invoice. The format displayed depends on how the invoice was created. For example:





```

File Edit Format View Help
<?xml version="1.0" encoding="UTF-8"?>
<Invoice>
  <InvoiceHeader>
    <InvoiceNumber>
      <Reference>
        <RefNum>MITIQA-Apr20-04</RefNum>
      </Reference>
    </InvoiceNumber>
    <InvoiceIssueDate>20120420T12:21:23</InvoiceIssueDate>
    <InvoiceReferences>
      <PurchaseOrderReference>
        <PurchaseOrderNumber>
          <Reference>
            <RefNum>Test-01-CO-10051jai</RefNum>
          </Reference>
        </PurchaseOrderNumber>
      </PurchaseOrderReference>
      <ASNumber>
        <Reference>
          <RefNum>2-1201</RefNum>
        </Reference>
      </ASNumber>
    </InvoiceReferences>
    <InvoicePurpose>
      <InvoicePurposeCoded>original</InvoicePurposeCoded>
    </InvoicePurpose>
  </InvoiceHeader>
</Invoice>

```

- For the **Validated Signed Invoice**: Click **View** to view the Signed Invoice in a PDF format.

You can then do the following in the PDF document,

Click	To
	Go to a specific page in the invoice.
	See the digital signature.
	View and reply to comments or markups in the invoice.
	View invoice attachments.

- **Revalidate** to view the signature and digital certificate details in a readable format

Signature Details Time: Monday, April 23, 2012 07:00:15 GMT algorithm: SHA1withRSA	Certificate issuer(Certificate Authority) details: Organization: Generic Development CA Name: Generic Development CA Trust Server CA Country: SE	Signatory(Certificate holder) details : Organization: trustWeaver AB Name2: TSCA-TEST sim certinomis Country: SE
Signature time-stamp details Time: Monday, April 23, 2012 07:00:15 GMT	Certificate issuer(Certificate Authority) details: Organization: Generic Development CA Name: Generic Development CA Trust Server CA Country: SE	Signatory(Certificate holder) details : Organization: TSEIOD-TEST Signing Service Name: TSEIOD-TEST Signing Service Country: SE
Signature validation time-stamp details Time: Monday, April 23, 2012 07:00:15 GMT	Certificate issuer(Certificate Authority) details: Organization: Generic Development CA Name: Generic Development CA Trust Server CA Country: SE	Signatory(Certificate holder) details : Organization: TSEIOD-TEST Signing Service Name: TSEIOD-TEST Signing Service Country: SE

- For an **Invoice Copy**, click **Download** to download a formatted copy of the original invoice in a PDF document.
- For the invoice **Audit Trail**, click **Download** to view or download the process lifecycle of the invoice.

Client:	HC_AICSWCSN10	Receiver:	ZZ:AICSWCBN10
Sender:	ZZ:AICSWCSN10	App Ref:	INVOICE
Sender Ref:	223102841		
GXS Ref No:	D-10006306000		
Document Type:	INVOICE		
Primary Key:	INVOICE_NUMBER -	MITIQA-Apr23-01	
Secondary Key:	BUYER_LEGAL_NAME -	Test-Buyer-001	
	BUYER_UNIQUE_ID -	MITSIGBLP1	
	INVOICE_TYPE -	TaxInvoice	
	SUPPLIER_LEGAL_NAME -	TEST-Seller-001	
	SUPPLIER_UNIQUE_ID -	MITSIGSLP1	
	INVOICE_VALUE -	330000.00	
	INVOICE_CURRENCY -	CHF	
	INVOICE_DATE -	2012-04-23T12:21:23Z	
Direction:	OUTBOUND		

Error Status: This Document: No error
 Life cycle: No error

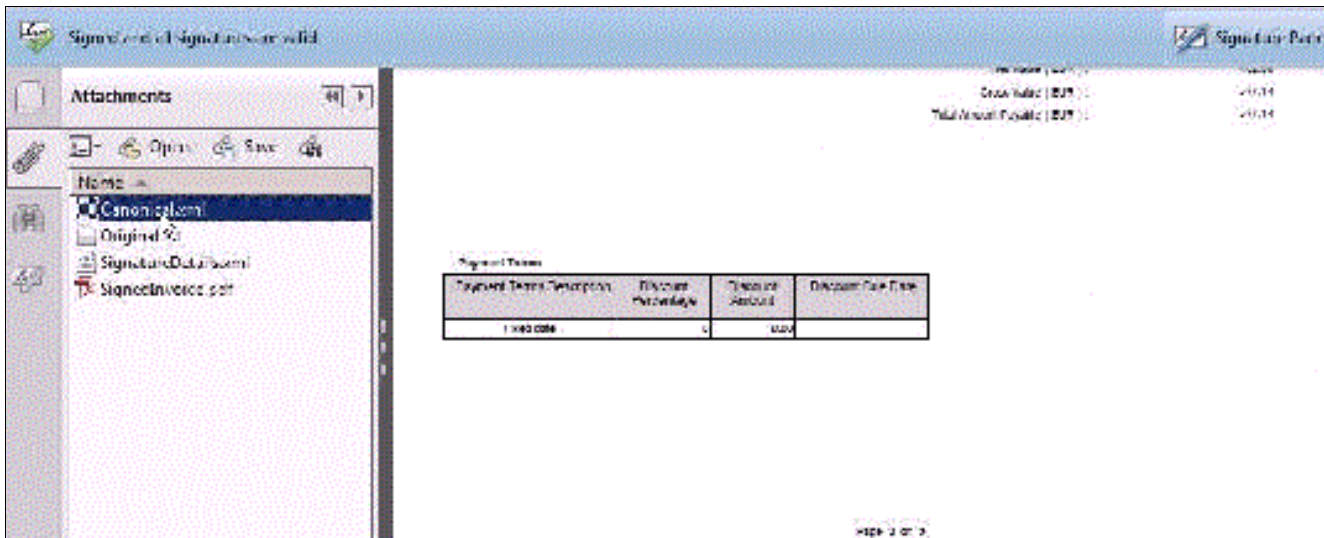
AIC	
Status History	
Data Validation Success	23-APR-12 04:59:55
Human Readable Invoice	23-APR-12 05:00:06
Image generation success	
Sign Success	23-APR-12 05:00:22
Supplier Archive Success	23-APR-12 05:00:35
Signature Validate Success	23-APR-12 05:00:38
Buyer Archive Success	23-APR-12 05:00:50
Processing Success	23-APR-12 05:00:53
Signature Type	
Active Invoice Sign PDF	

- For the **Summary List**, click **Download** to view or download the Summary List showing all message transmissions, both sent and received, associated with the invoice. The list also indicates any anomalies detected at each transmission. This list is generated once per day.

Active Invoice Summary List

Nature of Document	Function	Function Description	Invoice Number	Invoice Date (yyyy-mm-dd hh:mm)	GX2 Received Date (yyyy-mm-dd hh:mm)	Amount Ex-Inv	Amount Incl-Inv	Currency	Issuer	Recipient	Software
TaxCreditnote	DUPLICATE	FAILED_DUPLICATE_INVOICE_VALIDATION	Invoice36364040	2011-06-21 10:06	2010-06-24 02:08	140000.00	154000.00	CHF	3636 Indranagar 81001 road US	4040 US	AIC 5.01.00.13
TaxCreditnote	ORIGINAL	FAILED_DATA_VALIDATION	Invoice36364040	2011-06-21 10:06	2010-06-24 02:08	140000.00	154000.00	CHF	3636 Indranagar 81001 road US	4040 US	AIC 5.01.00.13
TaxCreditnote	ORIGINAL	INACTIVE_LEGAL_ENTITY_RELATIONSHIP	Invoice36364040	2011-06-21 10:06	2010-06-24 02:08	140000.00	154000.00	CHF	3636 Indranagar 81001 road US	4040 US	AIC 5.01.00.13
TaxCreditnote	ORIGINAL	INACTIVE_LEGAL_ENTITY_RELATIONSHIP	Invoice36364040-1	2011-06-21 10:06	2010-06-24 02:08	140000.00	154000.00	CHF	3636 Indranagar 81001 road US	4040 US	AIC 5.01.00.13
TaxCreditnote	ORIGINAL	INACTIVE_LEGAL_ENTITY_RELATIONSHIP	Invoice36364040-2	2011-06-21 10:06	2010-06-24 02:08	140000.00	154000.00	CHF	3636 Indranagar 81001 road US	4040 US	AIC 5.01.00.13

- For the **PDF Container**, click **View** to see the document and all its related data. Once you open the “container,” on the left side of the page click the attachment icon to see all the associated documents in the container.



- For the **Tax Exemption Justifying Document** (for more information, see “[Tax Exemption Justification Documents](#)” on page 172), click **Download** to download or view the associated document justifying VAT exemption in a PDF format.

SAMPLE COVER LETTER FOR FORM 3500A
(This letter is not required.)
Franklin Community Development Corporation
333 Franklin Avenue
Franklin City, CA 95520
(707) 555-5400

January 10, 2008
Exempt Organizations Unit MS F120
Franchise Tax Board
P.O. Box 1286
Rancho Cordova, CA 95741-1286

To Whom It May Concern:

Enclosed please find Form 3500A, Submission of Exemption Request, and a copy of the IRC section 501(c)(3) federal determination letter for the Franklin Community Development Corporation, a California nonprofit corporation.

The applicant corporation is and will be primarily funded by federal and state government agencies to provide free counseling, technical assistance, and job training to low-income individuals residing in economically depressed rural communities in Northern California (principally Franklin County). The purpose of such assistance is to promote rural community economic development by enabling individuals who are either low-income or chronically unemployed to own and/or operate successful rural-based businesses and cooperatives, and to engage in efficient agricultural and forest products' production, processing, and marketing.

Hopefully, the applicant's involvement in community-based rural economic development will enable expeditious consideration of its application for tax exemption. The applicant must

See also:

- ["Legal Entity Partner List" on page 170](#)
- ["Tax Exemption Justification Documents" on page 172](#)
- ["Search for Invoices Using Active Invoices" on page 135](#)
- ["Invoice Information Page" on page 164](#)
- ["Securely Delivered Items" on page 193](#)

Legal Entity Partner List

Important: This topic applies, and its functions might be required, if you have Trading Partners that send or receive Non-Signed EDI Invoices.

Every Company that sends or receives Non-Signed EDI Invoices must maintain a file of Trading Partners with whom the invoices are exchanged to log and track Trading Partner changes. AIC provides a search function that lets you quickly find an associated Trading Partner's legal entity profile to see if, for example, contact information has changed or if the Trading Partner E-Invoicing agreement has terminated.

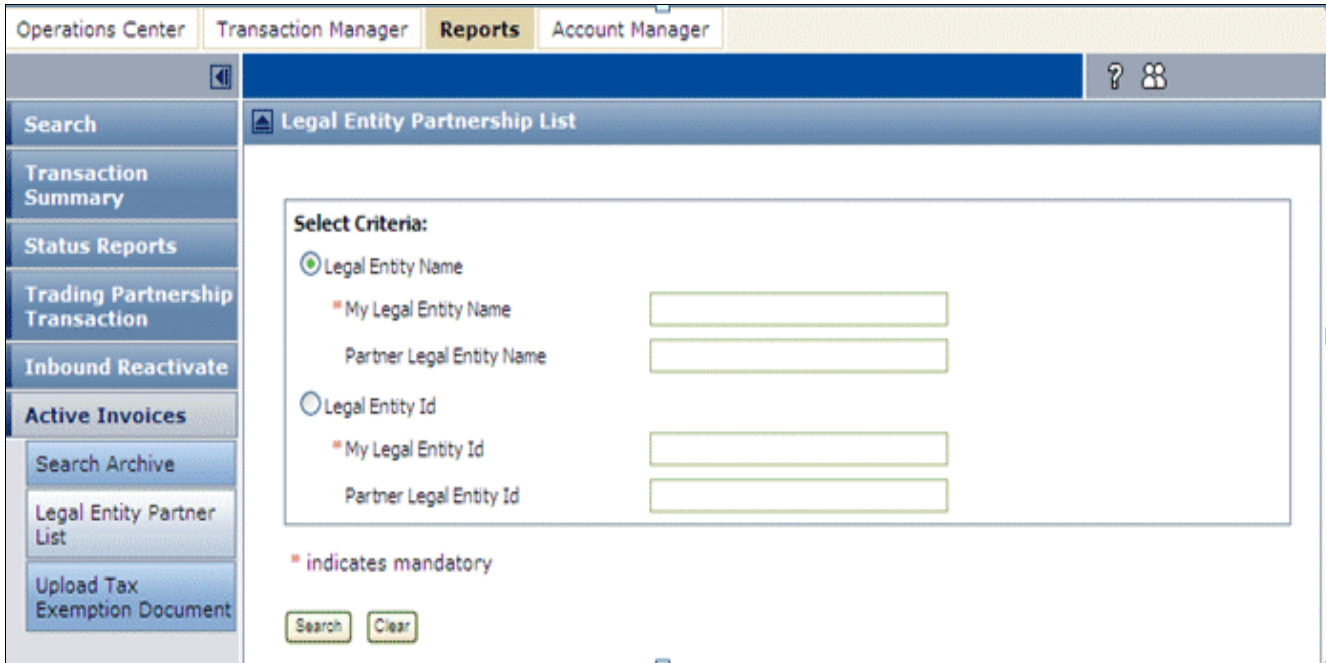
Note: A Legal Entity is the record of the unique Buyer or Supplier party, typically from a tax registration perspective, that exchange compliant invoices through AIC. This is a company or a business unit or division within a company. For example, Company ABC might operate in three European countries and might be registered

as a unique entity with the tax offices of each of those three countries. Therefore, Company ABC has three corresponding legal entities configured within AIC.

To see a Trading Partner(s) associated to a specific Legal Entity or Legal ID

- 1 If necessary, log into the GXS Trading Grid and click the **Reports** tab.
- 2 On the left side, click **Active Invoices > Active Invoices > Legal Entity Partner List**.

The Legal Entity Partnership List page opens.



- 3 For **My Legal Entity Name** or **My Legal Entity ID**, enter a valid name or ID of the entity that trades with the Partner(s).

Note: A valid Name or ID must be entered. If you do not know the exact Name or ID, contact your Company Administrator.

- 4 If you are looking for a specific Trading Partner that you trade with, enter that Trading Partner's **Legal Entity Name** or **Legal Entity ID**.
- 5 Click **Search**.

The page redisplay listing the Trading Partners associated to your Company's Legal Entity Name or ID that you specified.

The screenshot shows the 'Active Invoices' search interface. On the left is a navigation menu with options like 'Search', 'Transaction Summary', 'Status Reports', 'Trading Partnership Transaction', 'Inbound Reactivate', 'Active Invoices', 'Search Archive', 'Legal Entity Partner List', and 'Upload Tax Exemption Document'. The main area is titled 'Select Criteria:' and has two radio buttons: 'Legal Entity Name' (selected) and 'Legal Entity Id'. Under 'Legal Entity Name', there are fields for 'My Legal Entity Name' (containing 'MICHSUP1LP1 (SUPPLIER)') and 'Partner Legal Entity Name'. Under 'Legal Entity Id', there are fields for 'My Legal Entity Id' and 'Partner Legal Entity Id'. A note below states '* indicates mandatory'. There are 'Search' and 'Clear' buttons. Below the criteria is a table with columns: Status, My Role, My Name, My Address, Partner Name, Partner Address, Start Date of e-Invoicing, and End Date of e-Invoicing. The table contains several rows of data for legal entities. A message 'No changes applied to these legal entities during the tracking period' is displayed above the table. At the bottom right of the interface, there is a 'Trusted sites' indicator.

From this page you can do the following:

To	Description
Resort the listing	Click the applicable column header.
View a log of changed information	Click for the applicable entity.
Download the listing	Click .

See also:

- [“Search for Invoices Using Active Invoices”](#) on page 135
- [“Invoice Information Page”](#) on page 164
- [“Information Links”](#) on page 166
- [“Tax Exemption Justification Documents”](#) on page 172

Tax Exemption Justification Documents

Important: This topics applies, and its functions might be required, if you have Trading Partners that send or receive Non-Signed EDI Invoices.

If your Company has a document that justifies VAT exemption, you can upload it into the Archive. After you upload a tax exemption justification document, it applies to all subsequent invoices that are sent and received within the Legal Entity that you specify. This means that

- For a tax exemption document to apply to an invoice, the Buyer or Supplier must upload this document before the invoice is successfully sent or received.
- After a tax exemption document is uploaded it applies to all subsequently archived invoices until a new tax exemption document is uploaded.

For example:

On January 9, 2012 Invoice1, Invoice2, and Invoice 3 are archived.
 On January 10, 2012, tax exemption document Version 1 is uploaded and archived.
 On January 15, 2012 Invoice4, and Invoice5 are archived.
 On March 1, 2012 at 2 PM, Invoice6 is archived.
 On March 1, 2012 at 3 PM, tax exemption document Version 2 is uploaded and archived.
 On March 2, 2012 Invoice7, Invoice8, and Invoice9 are archived.

In this example:

- Invoice1, Invoice2, and Invoice3 are not linked to any tax exemption document.
- Invoice4 and Invoice5 are linked to tax exemption document Version 1.
- Invoice6 is linked to tax exemption document Version 1 because it was already in the Archive when Version 2 was uploaded.
- Invoice7, Invoice8, and Invoice9 are linked to tax exemption document Version 2.

To upload a tax exemption document

Important: The tax exemption document must be in PDF format and cannot be larger than 4MB.

- 1 In the Reports Tab, select **Active Invoices** from the Navigation Panel.
- 2 Click **Upload Tax Exemption Document**.

The Upload Document Justifying Tax Exemption page opens.

3 For **My Legal Entity Name** or **My Legal Entity ID**, enter the applicable name or ID of the entity associated with the Trading Partner(s) and the invoices this document applies to.

Important: You cannot upload a document until you enter a valid **Name** or **ID**. If you do not know the exact **Name** or **ID** contact your Company Administrator.

4 For **Upload Tax Exemption Document**, click **Browse** to find your document or enter the path and filename.

5 Click **Upload**.

Reporting Period

The standard reporting period includes the past 90 days. However, your service agreement might have an expanded reporting period from 13 months to up to five years.

Analytics Dashboard

The Analytics Dashboard displays the Key Performance Indicators (KPIs) with dial graphs and bar graphs. See [“Analytics Dashboard” on page 176](#). The system data is updated every 24 hours.

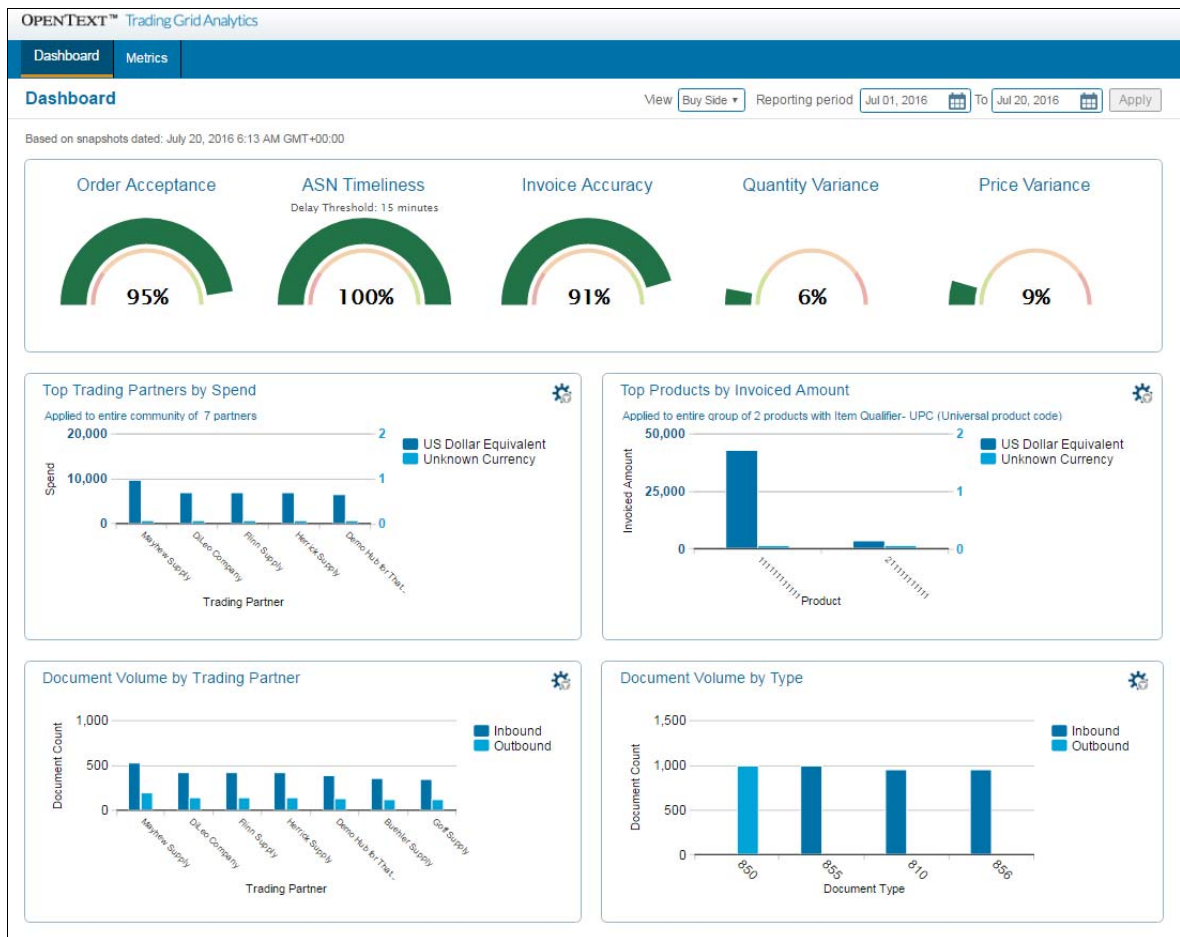
The information can be filtered in several ways, including by date range for the reporting period, currency, and more. See [“Filter Performance Metrics” on page 189](#).

To view the Analytics Dashboard

- 1 From the Operations Center page, click **Trading Grid Analytics**.

The Analytics Dashboard opens.

The reporting period is located in the upper-right of the page. The default view is the buy side of the supply chain.

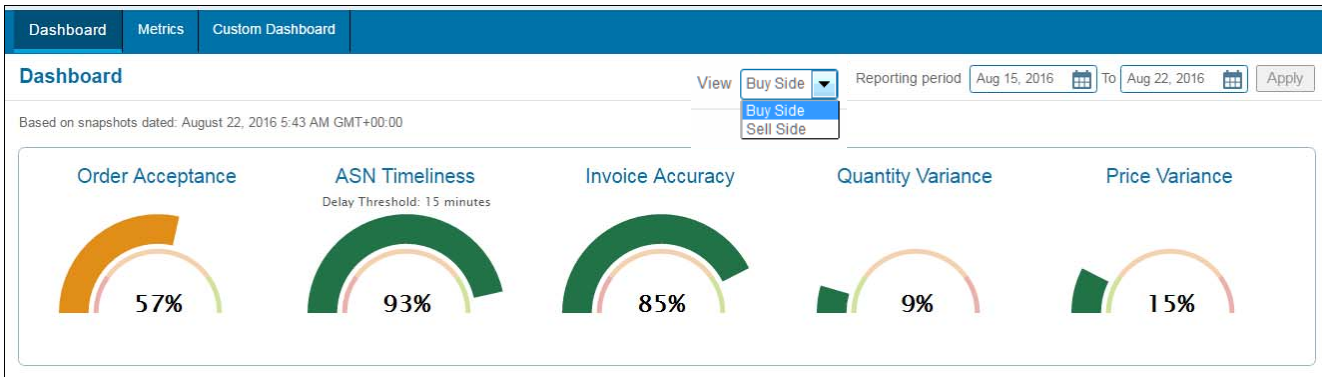


2 If your company is on the sell side, you must change the view.

To change the Analytics Dashboard view

You can toggle the view to either the Buy Side or Sell Side.

- 1 Click the dial you want to view.
- 2 Click the **View** drop-down menu.
- 3 Select **Buy Side** or **Sell Side**.



The dashboard updates to the buy side or sell side view.

To change the Reporting Period

- 1 Click the calendar tools to change the start date and end date.

The screenshot shows the 'Reporting period' selector interface. It features two calendar icons for selecting the start and end dates. The start date is set to 'Oct 01, 2015' and the end date is set to 'Oct 31, 2015'. An 'Apply' button is located to the right of the date fields.

- 2 Click **Apply**.

The dashboard updates to specified reporting period.

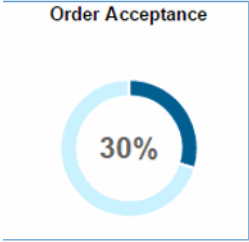
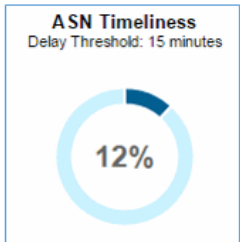
- 3 To view additional details about a metric, click the label or the dial for the metric.

Analytics Dashboard Top Panel

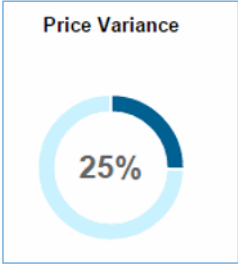
The top panel displays five business performance metrics related to order fulfillment.

- **Order Acceptance**
- **ASN Timelines**
- **Invoice Accuracy**
- **Quantity Variance**
- **Price Variance**

Percentage is the performance measurement, and the gauge bar color indicates the range of performance quality.

Metric	Description
<p>Order Acceptance</p>  <p>Order Acceptance</p> <p>30%</p>	<p>Order Acceptance is the percentage of fully acknowledged purchase orders. The Order Acceptance metric compares two KPIs:</p> <ul style="list-style-type: none"> ■ The number of orders from the selected time period. ■ The number of those orders that were accepted in full. <p>Note: Partially acknowledged purchase orders ARE NOT fully acknowledged.</p> <p>The system used EDI 855's and ORDRSP (a Purchase Order Response) documents for this metric.</p> <ul style="list-style-type: none"> ■ ANSI - 850 BEG03 matches to 855 BAK03. <ul style="list-style-type: none"> ■ The order is fully accepted when 855 BAK02 = AD, AK, AC, AT, AP or ZZ. <ul style="list-style-type: none"> - BEG03 = Purchase Order Number - BAK03 = Purchase Order Number - BAK02 = Acknowledgement Type ■ EDIFACT - ORDERS BGM02 matches ORDRSP RFF0102 (where RFF0101 = ON or VN). <ul style="list-style-type: none"> ■ The order is fully accepted when ORDRSP BGM03 = 6, 11, 32, 44. <ul style="list-style-type: none"> - 48BGM02 = Message Number - RFF0102 = Reference Number - RFF0101 = Reference Qualifier - BGM03 = Message Code
<p>ASN Timelines</p>  <p>ASN Timeliness Delay Threshold: 15 minutes</p> <p>12%</p>	<p>Advanced Shipping Notice (856 as per ANSI X 12).</p> <p>ASN Timeliness is the percentage of timely ASN instances created within the specified delay threshold (default = 15 min).</p> <p>An ASN is timely if the elapsed time between the interchange date/time and the document date/time creation is within the delay threshold.</p> <ul style="list-style-type: none"> ■ ANSI - 856 Take ISA09/10 – BSN03/04 = Timeliness. <ul style="list-style-type: none"> ■ If Timeliness < TimeParm (selected by user – 15 min default) then ON-TIME. <ul style="list-style-type: none"> - ISA09 = Interchange Date - ISA10 = Interchange Time - BSN03 = Date - BSN04 = Time ■ EDIFACT - DESADV Take UNB0401/02 – DTM0102 = Timeliness. <ul style="list-style-type: none"> ■ If Timeliness < TimeParm (selected by user – 15 min default) then ON-TIME. <ul style="list-style-type: none"> - UNB0401 = Date of Preparation - UNB0402 = Time of Preparation - DTM0102 = Date & Time Period

Metric	Description
<p>Invoice Accuracy</p> <div data-bbox="352 333 600 594"> <p>Invoice Accuracy</p> <p>92%</p> </div>	<p>Invoice Accuracy is the percentage of invoices that accurately reflect quantities and prices in the original orders.</p> <ul style="list-style-type: none"> ■ ANSI - 850 BEG03 matches to 810 BIG04. <ul style="list-style-type: none"> ■ Align PO106/07 to IT106/07. ■ Match PO102 to IT102 (Quantity) & PO104 to IT104 (Price). <ul style="list-style-type: none"> - PO106 = Product Service Qualifier, PO107 = Product Service ID - PO102 = Quantity Ordered, PO104 = Unit Price. - BIG04 = Purchase Order Number - IT106 = Product Service Qualifier - IT107 = Product Service ID - IT102 = Quantify Invoiced - IT104 = Unit Price ■ EDIFACT - ORDERS BGM02 matches to INVOICE RFF0102 (where RFF0101 = ON or VN). <ul style="list-style-type: none"> ■ Align PO LIN0301 to Inv LIN0301. ■ Match PO QTY0102 to Inv QTY0102 (Qty) & PO PRI0102 to Inv PRI0102 (Price). <ul style="list-style-type: none"> - LIN0301 = Item Number - QTY0102 = Quantity - PRI0102 = Price
<p>Quantity Variance</p> <div data-bbox="352 1052 600 1312"> <p>Quantity Variance</p> <p>1%</p> </div>	<p>Quantity Variance indicates the average line item percentage difference between the invoiced quantity and the purchase order quantity.</p> <ul style="list-style-type: none"> ■ ANSI - 850 BEG03 matches to 810 BIG04. <ul style="list-style-type: none"> ■ Align PO106/07 to IT106/07 and PO102-IT102/PO102*100. ■ Then, average the variance of total line items for each Trading Partner. ■ EDIFACT - ORDERS BGM02 matches to INVOICE RFF0102 (where RFF0101 = ON or VN). <ul style="list-style-type: none"> ■ Align PO LIN0301 to Inv LIN0301 and PO QTY0102 - Inv QTY0102/PO QTY0102 * 100. ■ Then, average the variance quantity of the total line items for each Trading Partner. <p>Note: Refer to Quantity Variance for EDI Element descriptions in the Quantity Variance calculations for ANSI and EDIFACT.</p>

Metric	Description
<p>Price Variance</p> 	<p>Price Variance indicates the average line item percentage variance between prices on an invoice to the original purchase order price.</p> <ul style="list-style-type: none"> ■ ANSI - 850 BEG03 matches to 810 BIG04. <ul style="list-style-type: none"> ■ Align PO106/07 to IT106/07. ■ PO104-IT104/PO104*100 . ■ Then average the variance on line items. ■ EDIFACT - ORDERS BGM02 matches to INVOICE RFF0102 (01 = ON or VN) <ul style="list-style-type: none"> ■ Align PO LIN0301 to Inv LIN0301 ■ PO PRI0102 - Inv PRI0102/PO PRI0102 * 100 ■ Then, average the variance price of the total line items for each Trading Partner.

Note: Top Trading Partners by Spend and Top Products by Invoiced Amount are also KPI Business Metrics and displayed as bar graphs.

Performance Default Ranges

Below are the KPI default ranges for the following Business Metrics.

Metric	Positive Range (Green)	Average Range (Yellow)	Negative Range (Red)
Order Acceptance	>=80%	Between 20% and 80%	<=20%
ASN Timeliness	>=80%	Between 20% and 80%	<=20%
Invoice Accuracy	>=80%	Between 20% and 80%	<=20%
Price Variance	<=20%	Between 20% and 80%	>=80%
Quantity Variance	<=20%	Between 20% and 80%	>=80%

Analytics Dashboard Bar Graphs

The bar graphs display two Operational Metrics and two Business Metrics.

Business Metrics

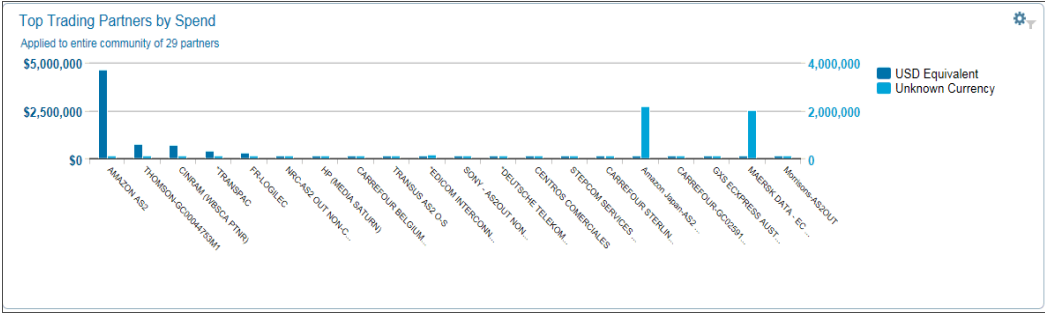
- Top Trading Partners by Spend
- Top Products by Invoiced Amount

Operational Metrics

- Document Volume by Trading Partners
- Document Volume by Type

Business Metrics Bar Graphs

Top Trading Partners by Spend



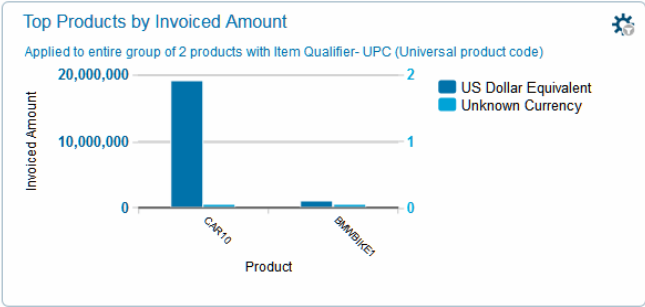
Displays the top 20 trading partners based on the prices and quantities from the original order.

Note: Documents with missing currency codes are grouped under "UNK" (unknown).

Top partners display by Spend / Revenue of the product ordered.

- 850 Calculate PO102 (Quantity) * PO104 (Price)
 - Capture Currency if available.
 - Add up all line items.
- ANSI - 850 Calculate PO102 (Quantity) * PO104 (Price)
 - Capture currency if available.
 - Add up all line items for all PO's for each Trading Partner.
- EDIFACT - ORDERS Calculate QTY0102 (Qty) * PRI0102 (Price).... Capture Currency if available. Add up all line items for all PO's for each Trading Partner.

Top Products by Invoiced Amount

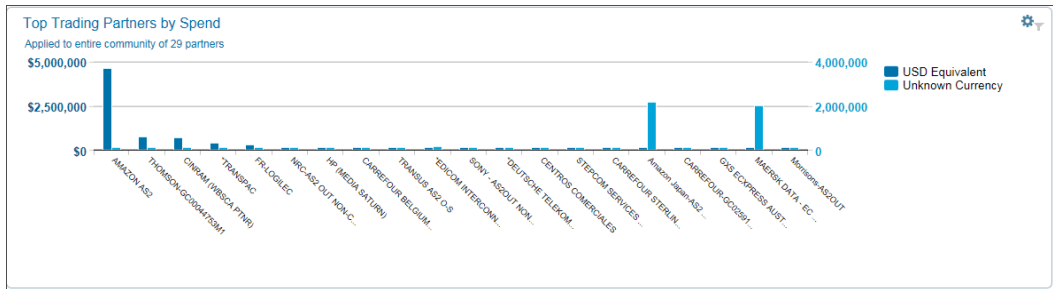


Displays the top five products by invoice amount, based on the invoiced value and the qualifier that you select.

Note: Documents with missing currency codes are grouped under "UNK" (unknown).

Operational Metric Bar Graphs

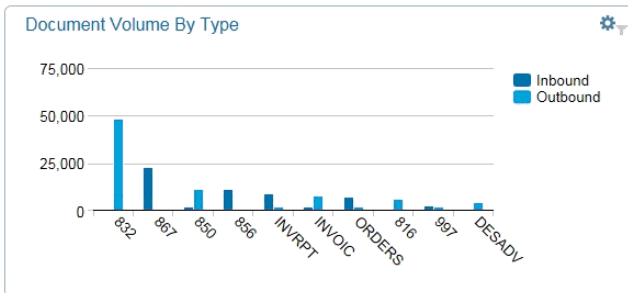
Document Volume by Trading Partners



Displays the top 10 trading partners, based on the total number of X12 and EDIFACT documents sent and received.

The information can be filtered for either Inbound or Outbound transactions.

Document Volume by Type



Displays the top 10 document types, based on the total number of X12 and EDIFACT documents sent and received.

The information can be filtered for either Inbound or Outbound transactions.

Metrics Tab

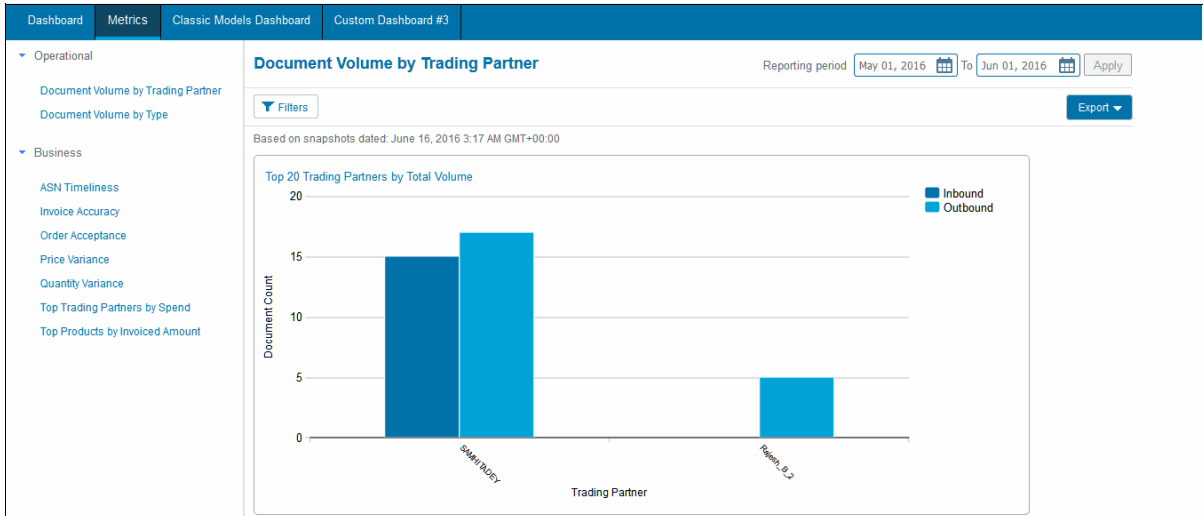
The Metrics tab provides access to additional detail for the Operational and Business metrics, which can be filtered in several ways and exported as a .pdf or .csv file.

Operational Metrics Detail

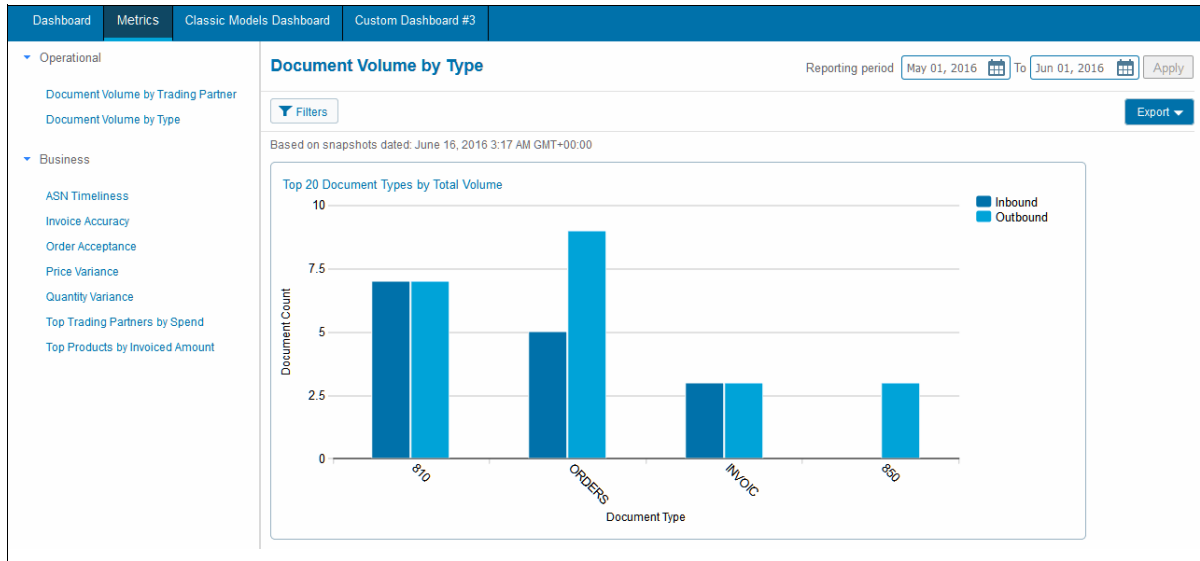
To view the detail for Operational Metrics

- 1 From the Analytics Dashboard, click the Metrics tab.

The Document Volume by Trading Partners page opens (by default).



- 2 To view the detail for Document Volume By Type, click **Document Volume By Type** from the Navigation Panel.



Business Metrics Detail

To view Business Metric detail

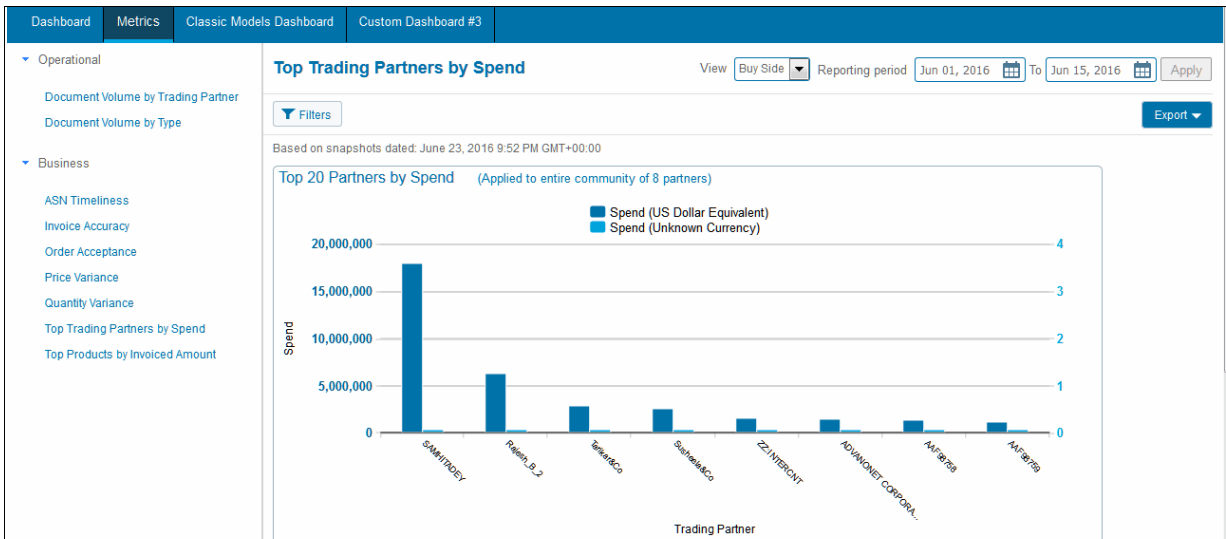
- 1 From the Analytics Dashboard, click the Metrics tab.

The Operational Metric, Document Volume by Partner page displays.

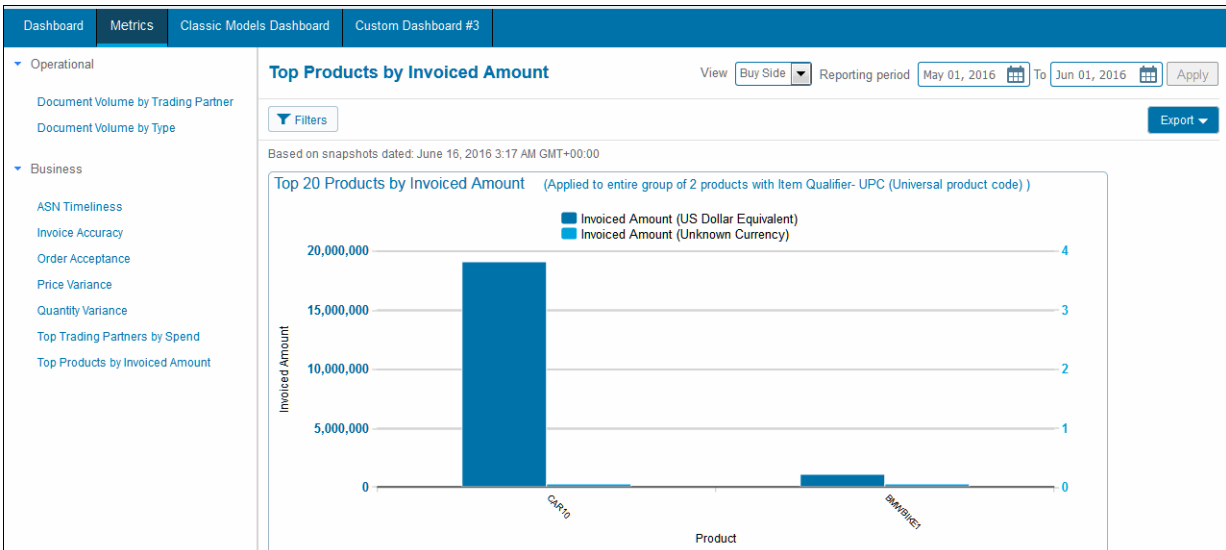
Note: You can also access the Metrics tab for the five dial graph business metrics by clicking on the graph.

- 2 In the Navigation Panel, click the in the Business section for the metric detail you want to view.

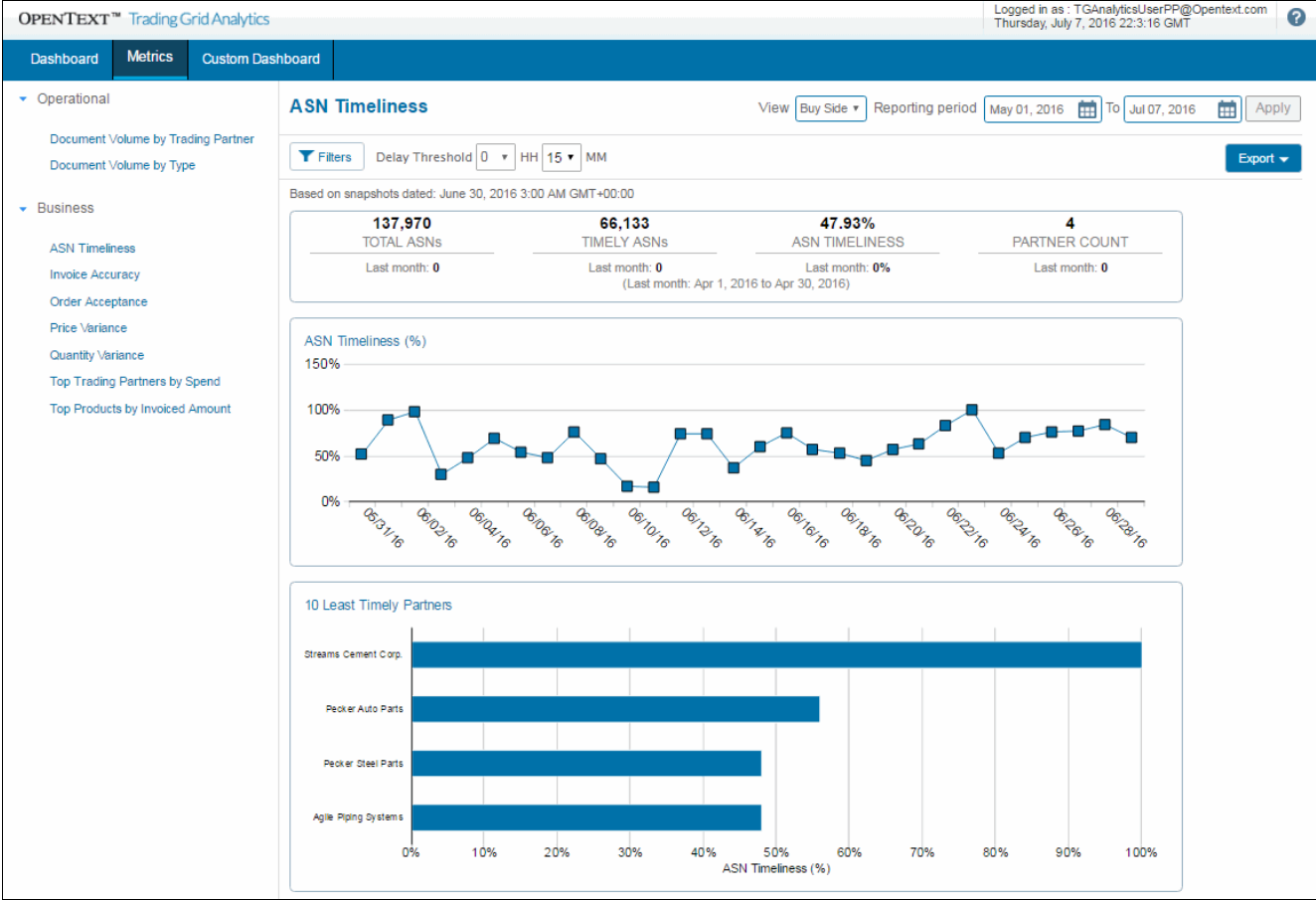
Top Trading Partners by Spend Metrics Page



Top Trading Partners by Invoiced Amount Metrics Page

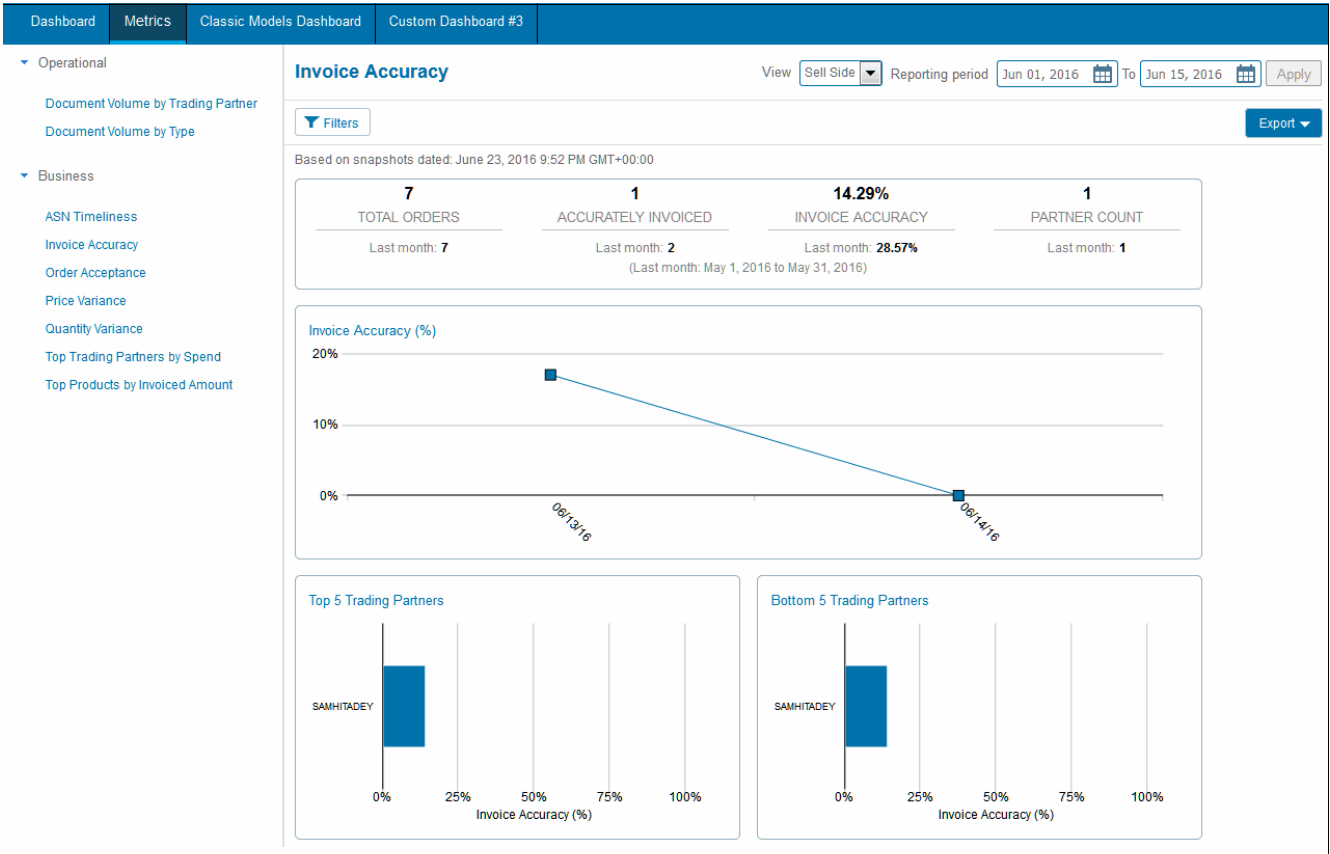


ASN Timelines Metrics Page



Note: Depending on date range selected, prior 30 days data might not be available for viewing, and zero displays for the four components measured.

Invoice Accuracy Metrics Page



Order Acceptance Metrics Page

Dashboard Metrics Classic Models Dashboard Custom Dashboard #3

Operational
Document Volume by Trading Partner
Document Volume by Type

Business
ASN Timeliness
Invoice Accuracy
Order Acceptance
Price Variance
Quantity Variance
Top Trading Partners by Spend
Top Products by Invoiced Amount

Order Acceptance

View **Sell Side** Reporting period Jun 01, 2016 To Jun 15, 2016 Apply

Filters Export

Based on snapshots dated: June 23, 2016 9:52 PM GMT+00:00

23 TOTAL ORDERS Last month: 9	0 ACCEPTED ORDERS Last month: 0 (Last month: May 1, 2016 to May 31, 2016)	0.00% ORDER ACCEPTANCE Last month: 0.00%	1 PARTNER COUNT Last month: 2
---	--	--	---

Order Acceptance (%)

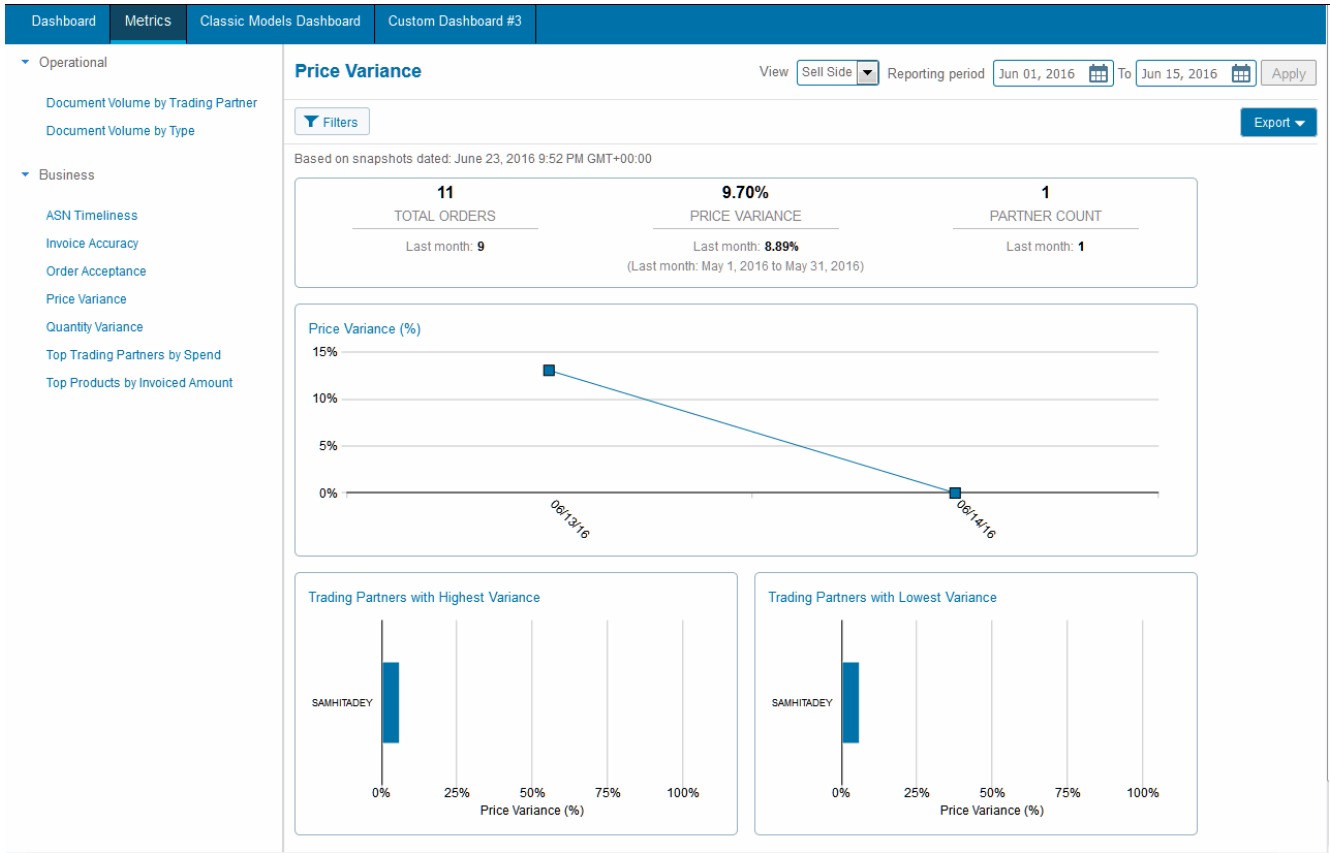
Top 5 Trading Partners

Bottom 5 Trading Partners

The View option for Order Acceptance defaults to **Buy Side**. If you view this metric and there is no data, change the view to **Sell Side**.

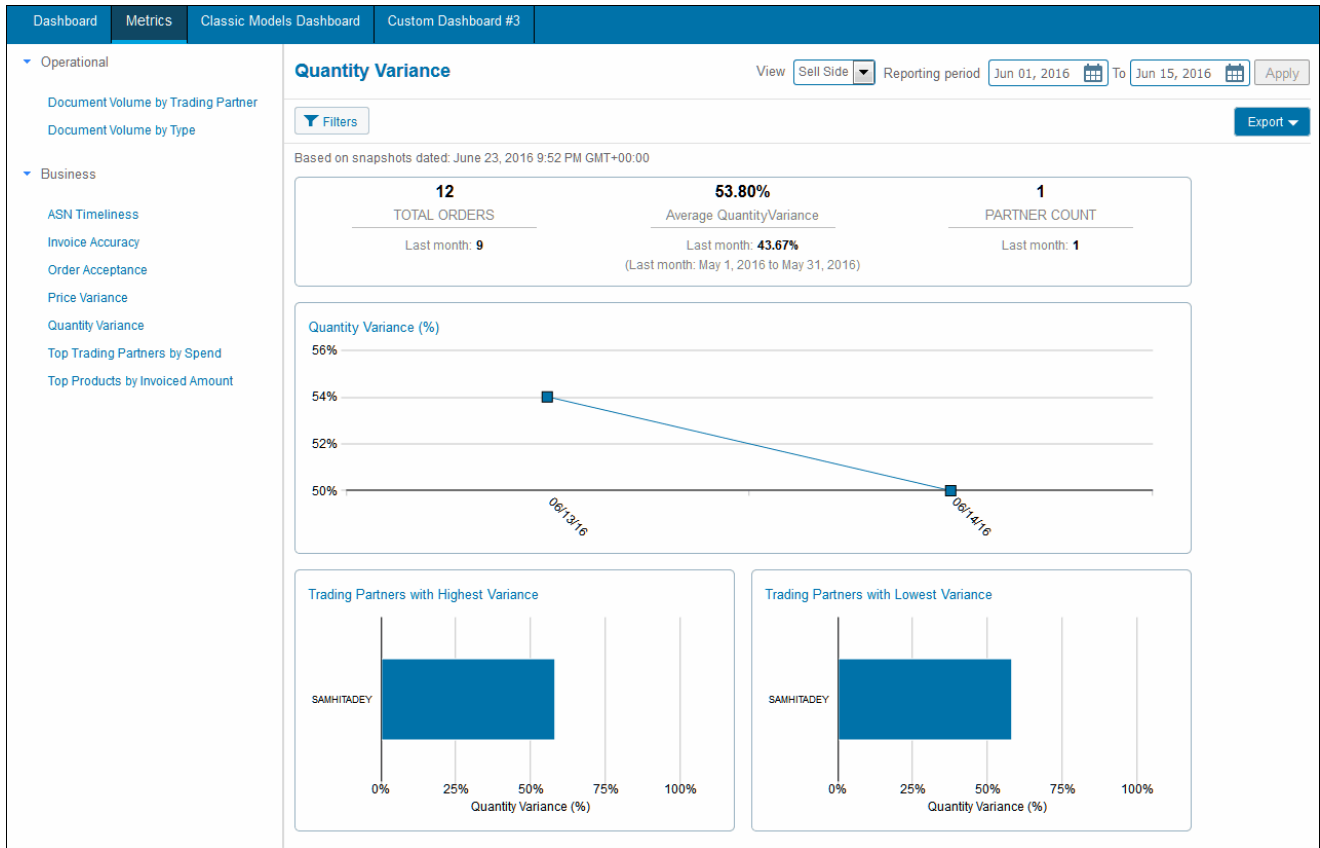
Note: Depending on date range selected, the prior 30 days of data might not be available for viewing, and zero displays for the four components measured.

This note to be corrected in the next release. **Price Variance Metrics Page**



Note: Depending on date range selected, the prior 30 days of data might not be available for viewing, and zero displays for the four components measured.

Quantity Variance Metrics Page



Note: Depending on date range selected, the prior 30 days of data might not be available for viewing, and zero displays for the four components measured.

Filter Performance Metrics

To search for specific information, you can filter the performance metrics in a variety of ways, and save a filter as a default.

Metric Type	Filter data by	Metric
Business Metrics	Trading Partner Name	■ All
	Trading Partner Address	■ All
	Item Qualifier	■ Top Partners by Spend
	Currency	■ Top Partners by Spend ■ Top Products by Invoiced Amount
Operational Metrics	Document Type	■ Document Volume by Trading Partner ■ Document Volume by Type

Access these filters from either the graphs on the Analytics Dashboard or the Metrics tab.

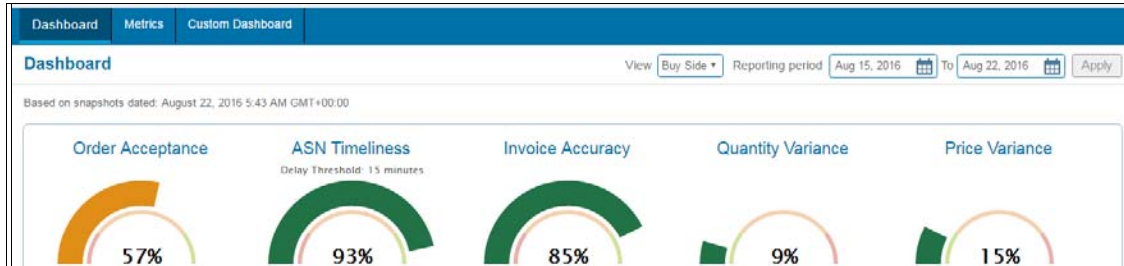
Filter Business and Operational Metrics by Trading Partner

To filter by Trading Partner

1 Do one of the following:


Filter data from a dial graph:

- Click a graph label or anywhere on a graph.

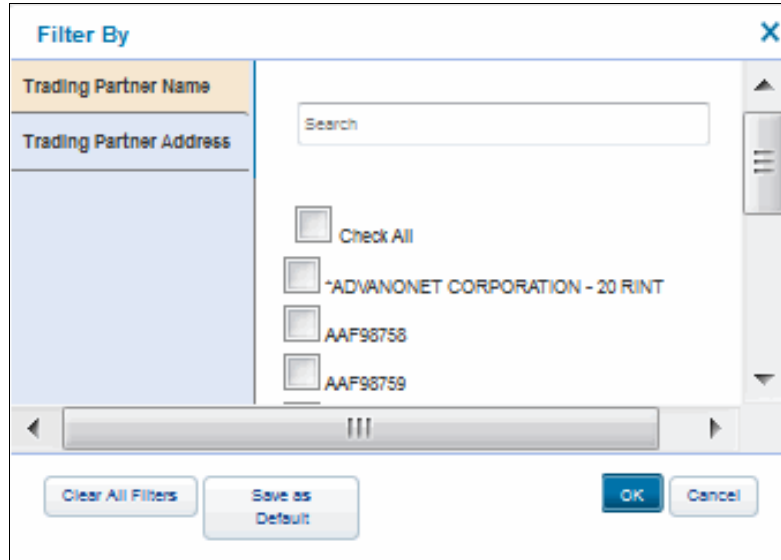


The Metric tab displays the performance detail page for the metric.



- In the performance detail page, click .

The Filter By page opens the Trading Partner Name filter (by default).



- Continue to step 2.

Filter data from a bar graph:

- From the Analytics Dashboard, click in a graph.
- Click the Filter icon .

The Metric tab displays the performance detail page.

- In the performance detail page, click .

The Filter By page opens the Trading Partner Name filter (by default).

- Continue to step 2.

2 Click the checkboxes for names of the Trading Partners for the search.

3 Click **OK**.

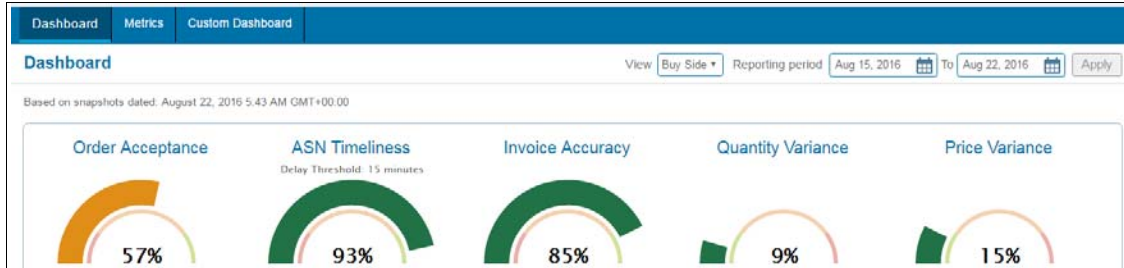
Filter Business and Operational Metrics by Trading Partner Address

To filter by Trading Partner Address

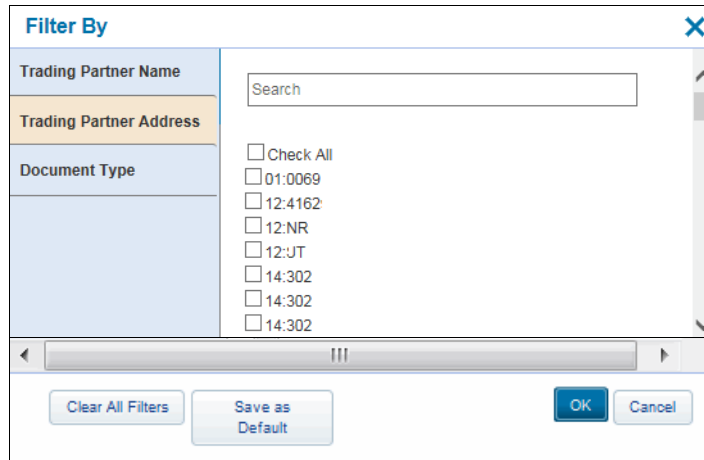
1 Do one of the following:

Filter from the dial graphs:

- Click the graph label or anywhere on the graph.



The Filter By page opens the Trading Partner Name filter (by default).



- Continue to step 2.

To filter from the bar graphs:

- From the Analytics Dashboard, click in a graph.
- Click (Filter) .

The Metric tab displays the performance detail page.

- In the performance detail page, click .

The Filter By page opens the Trading Partner Name filter (by default).

- Continue to step 2.

2 Click **Trading Partner Address**.

3 Click the checkboxes for address of the Trading Partners for the search.


4 Click **OK**.

Filter Operational Metrics by Document Type


To filter by Document Type

1 From the Analytics Dashboard, click in one of the following performance graphs:

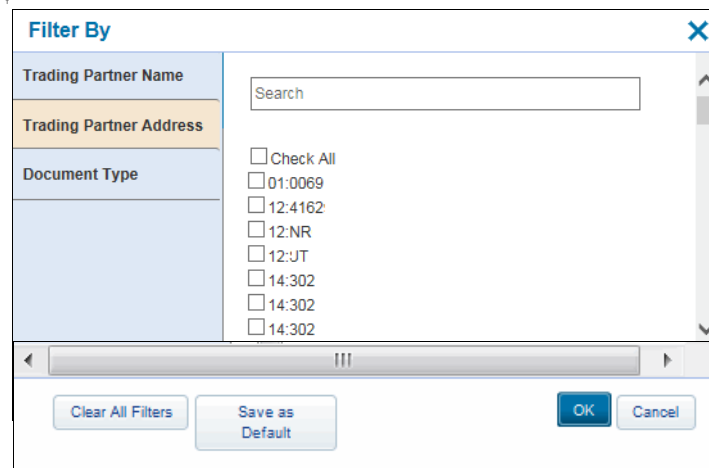
- **Document Volume by Trading Partner**
- **Document Volume by Type**

2 Click (Filter) .

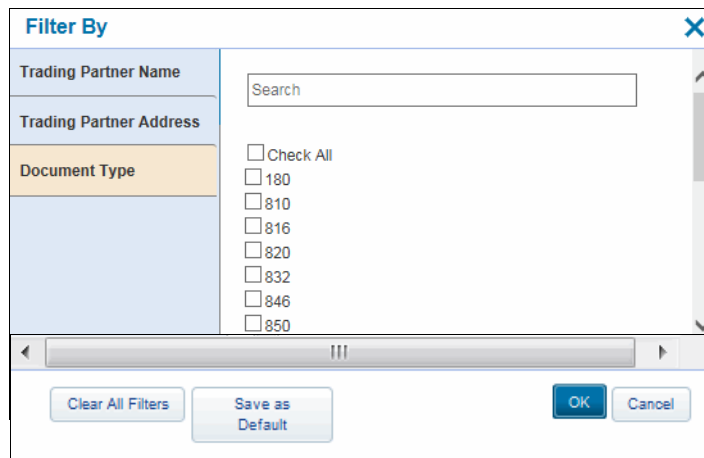
The Metric tab displays the performance detail page.

3 In the performance detail page, click .

The Filter By page opens the Trading Partner Name filter (by default).



4 Click **Document Type** to view the document type list.



5 Click the checkboxes for the types of documents for the search.

6 Click **OK**.

Filter Business Metrics by Currency


The U.S. dollar is default currency used in the business metrics bar graphs on the Analytics Dashboard. However, you can display the same information in a different currency by Trading Partner.

To filter by Currency


1 From the Analytics Dashboard, click  in one of the following bar graphs:

- **Top Trading Partner by Spend**

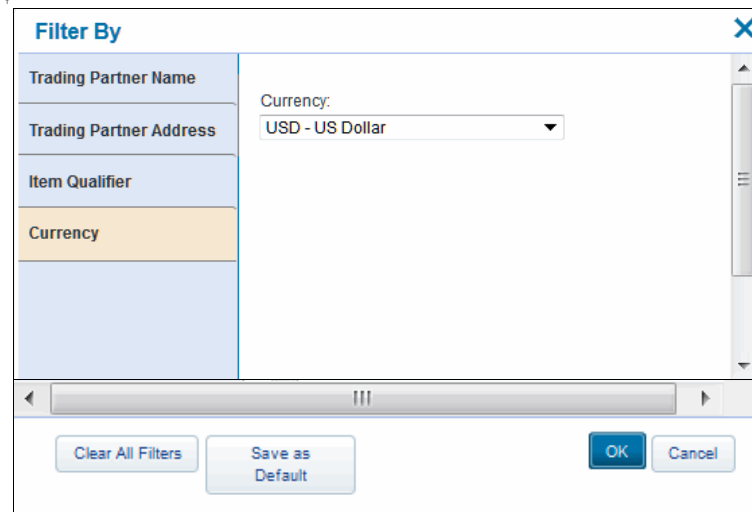
■ **Top Products by Invoiced Amount**

2 Click (Filter) .

The Metric tab displays the performance detail page.

3 In the performance detail page, click .

The Filter By page opens the Trading Partner Name filter (by default).



4 Click **Currency**.

5 Select the currency you want to use for the performance metric.

6 Click **OK**.

The information updates with the new currency.


Note: You can only select and apply one currency at a time.

Filter Business Metrics by Item Qualifier

There might be many qualifiers that are applicable to your organization, such as for products ordered by batch number or UBC code. The Item Qualifier Filter is available to the Top Products by Invoiced Amount metric to filter for such qualifiers.

To filter by Item Qualifier

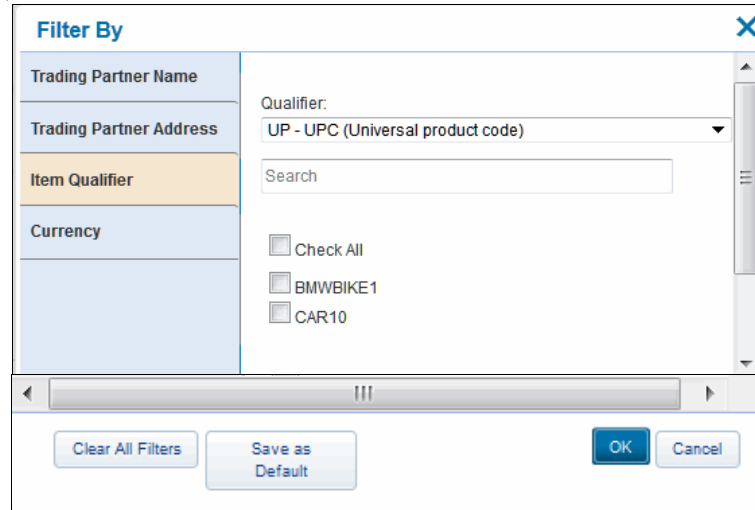
1 From the Analytics Dashboard, click  in **Top Products by Invoiced Amount** graph.

2 Click (Filter) .

The Metric tab displays the performance detail page.

3 In the performance detail page, click .

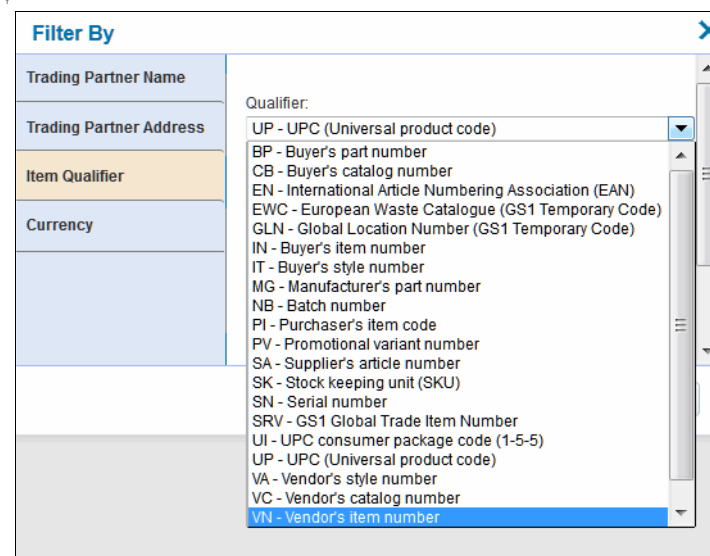
The Filter By page opens the Trading Partner Name filter (by default).



4 Click Item Qualifier.

If there is any product with that qualifier, it will display in the automatically generated selection.

5 Select the qualifier from the Qualifier drop-down menu. You can select up to five qualifiers for the filter.



6 Click OK.



The qualifier items display in the bar chart on the Analytic Dashboard.

Save Default Filters

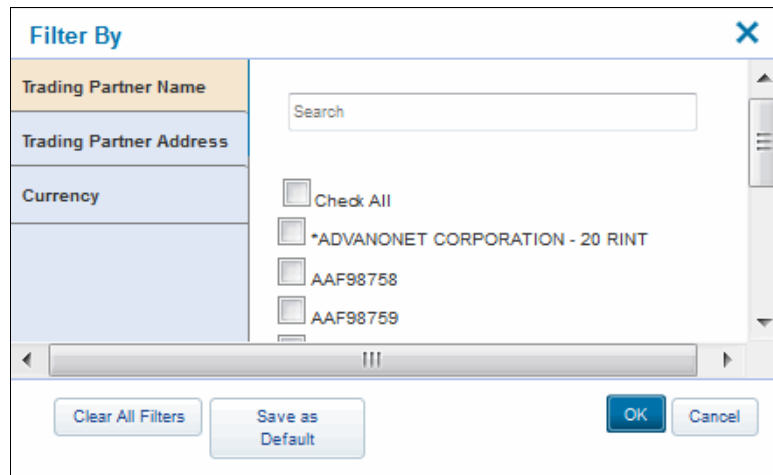
Saving a filter as a default displays the same graphical view of a metric, based on the data filtered. For example, you can save the filter for the Top Trading Partners by Spend graph to display specific Trading Partner names and currencies each time you open Trading Grid Analytics.

You can save filters for both the metrics in Analytics Dashboard Top Panel or from Analytics Dashboard bar graph. In addition, the filters that you set from a graph on the dashboard carry over to the views in the top panel (and vice versa).

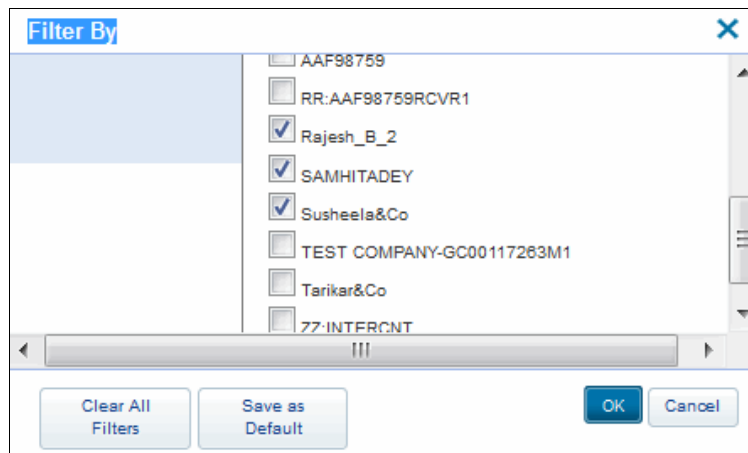
To save a default filter from a bar graph

- 1 From the Analytics Dashboard, click  in a graph to access the filter settings .
- 2 Click the Filter icon  .

The Filter By page list the items that can be filtered for a metric.

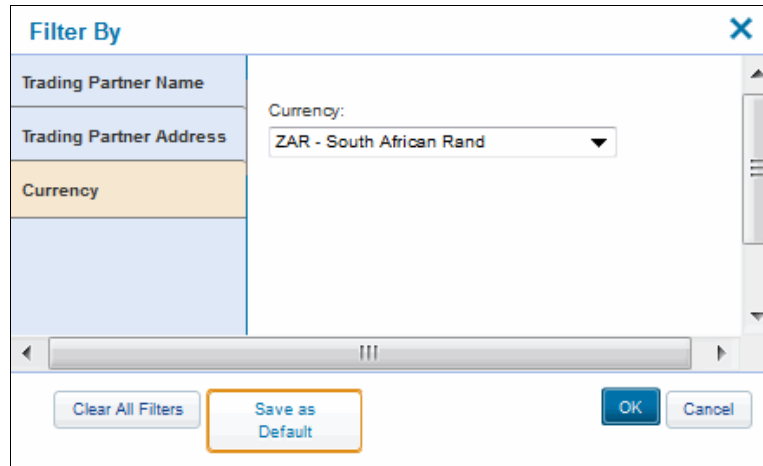


- 3 Click the tab for the filter, for example the Trading Partner Name tab.
- 4 Click the checkboxes for the items to include in the filter, and click **OK**.



- 5 To add additional criteria, click the appropriate tab, and repeat step 4.

6 After selecting all of the filter criteria, click **Save as Default**.



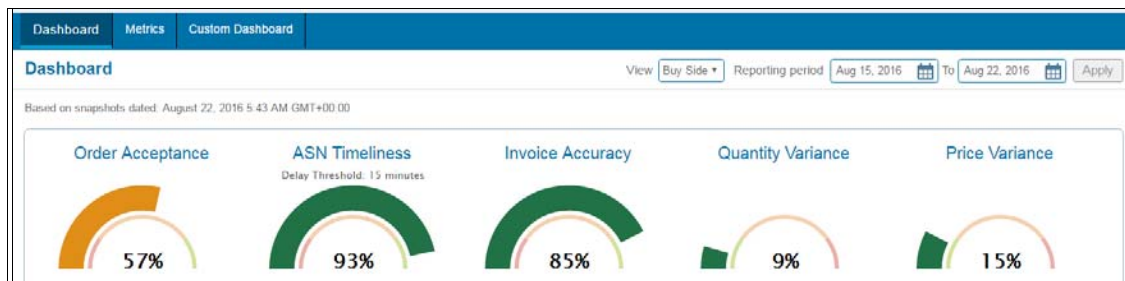
7 Click **OK** in the confirmation message.

The graph updates, and the default parameters display automatically each time you access the Analytics Dashboard.



To save a default filter from the top panel

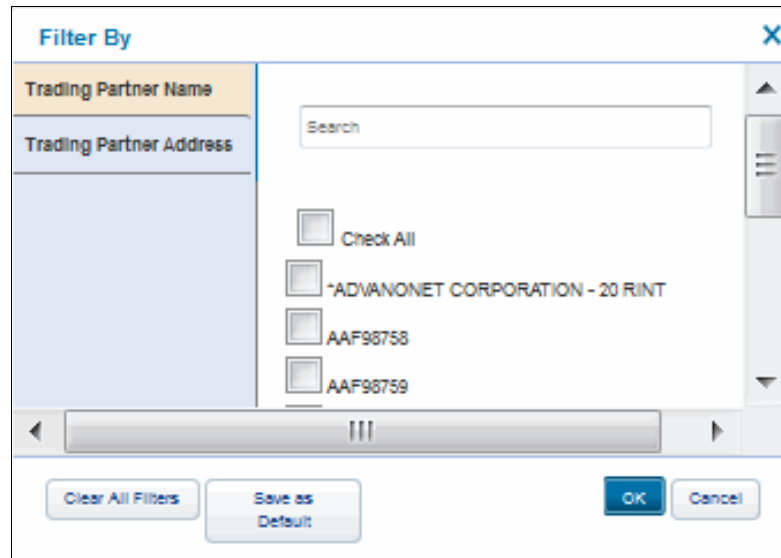
1 Click a graph label or anywhere on a graph.



The Metric tab displays the performance detail page for the metric.

- 2 In the performance detail page, click .

The Filter By page opens the Trading Partner Name filter (by default).



- 3 Select the criteria for the filter, and click **OK**.
- 4 Click **Save as Default**.

Remove Default Filters

Removing default filters returns to the default view of the system.

To remove a default filters

- 1 In the Filter By page, click **Clear All Filters**.
- 2 Click **OK**.

The page refreshes to the default view. No Trading Partner Name or Trading Partner Address filters are selected, and the currency is set to USD - US Dollar.

Export Performance Metric Data

Analytic information can be exported into a PDF or spreadsheet format (.xlsx).

To export analytic metrics

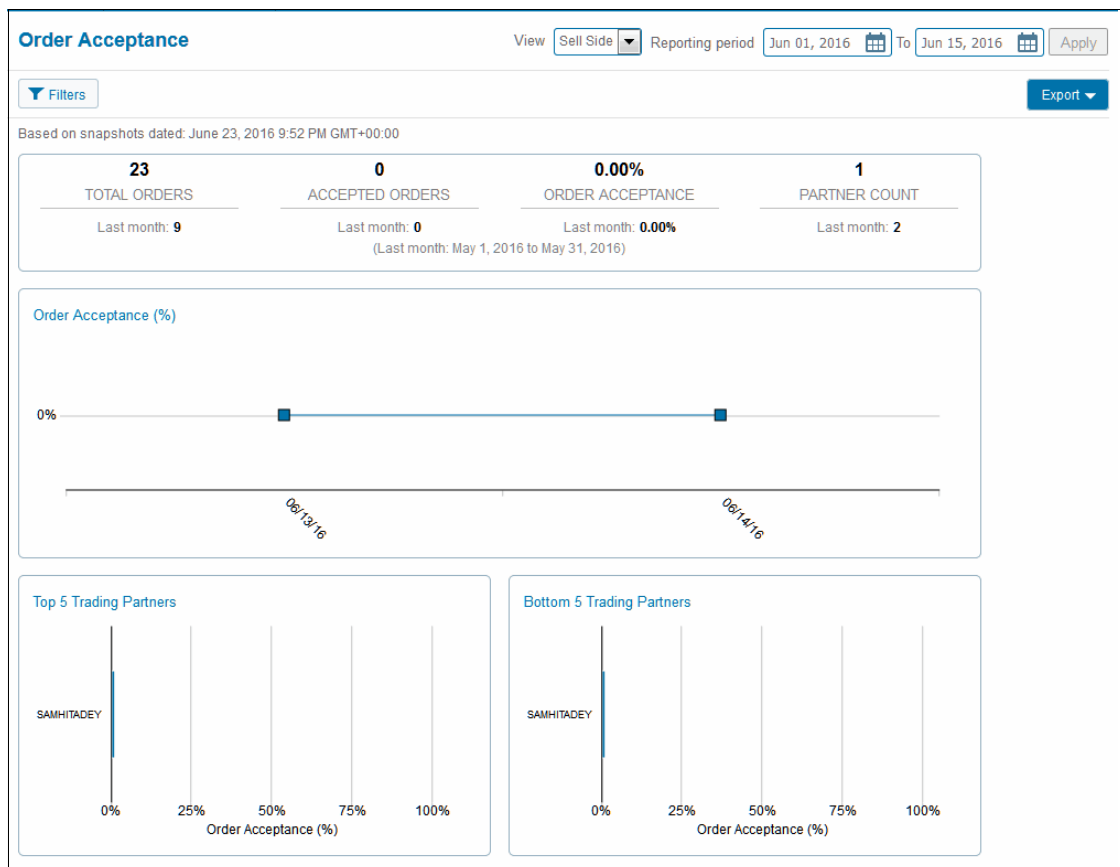
1 Do one of the following:

Export data from a dial graph:

- Click the graph label or anywhere on the graph.





The Metric tab displays the performance detail page.




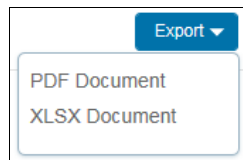
- In the Metrics performance detail page, click **Export**.
- The Export drop-down menu opens.
- Continue to Step 2.

To export data from a bar graphs:

- From the Analytics Dashboard, click  in a graph.
- Click (Filter) .

The Metric tab displays the performance detail page.

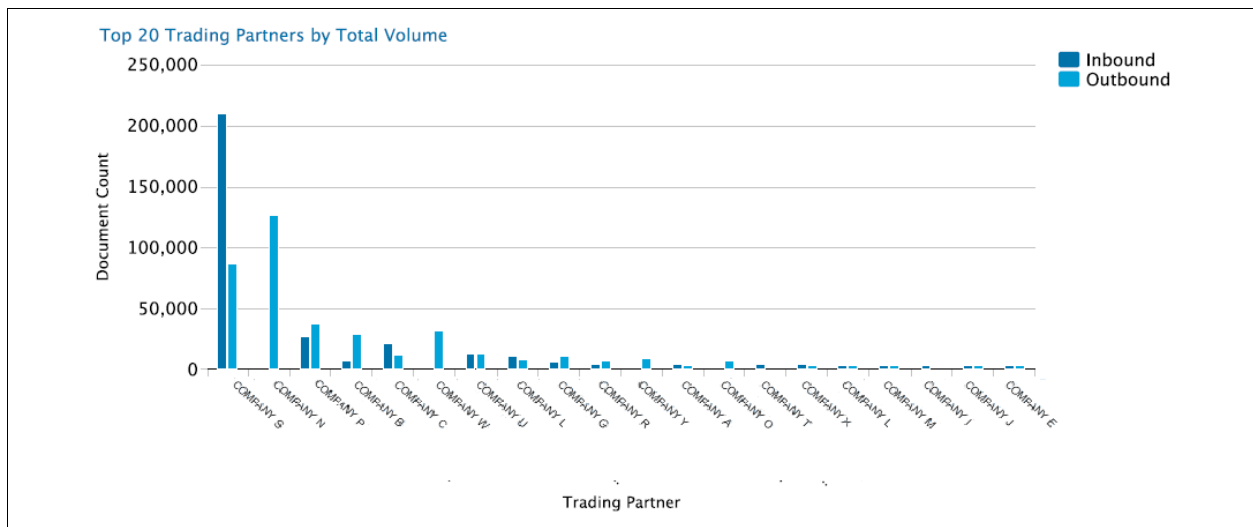
- In the Metrics performance detail page, click .
- The Export drop-down menu opens.



- 2 Select either **PDF Document** or **XLSX Document**.
- 3 Follow your browser prompt to **Open** or **Download** the file.



Below is an example of an exported PDF file.



Below is an example of an exported XLSX file.

Note: The contents of the XLSX file vary, depending upon the metric exported.

	A	B	C	D
1	Partner Name	Total USD Amount	Total Unknown Currency Amount	
2	COMPANY S	3054225.807	0	
3	COMPANY N	732340.5085	0	
4	COMPANY P	696070.5256	0	
5	COMPANY B	424505.9537	0	
6	COMPANY C	310287.3101	0	
7	COMPANY W	122462.7695	0	
8	COMPANY U	114084.9547	0	
9	COMPANY L	75488.27729	0	
10	COMPANY G	18576.09734	160397.323	
11	COMPANY R	11442.01517	0	
12	COMPANY Y	8321.832592	0	
13	COMPANY A	4077.292824	0	
14	COMPANY O	3317.737103	0	

Dashboard Settings

The Dashboard Settings feature on the Analytics Dashboard allows administrative users within a company to configure two settings:

- Configure the default currency for your trading partner community; then upload the currency settings to the system through a batch upload process for two business metrics:
 - Top Trading Partners by Spend
 - Top Products by Invoiced Amount
- Configure the default Item Qualifier for the Top Products by Invoiced Amount metric for an entire organization.

Trading Partner Currency Settings

To configure Trading Partner currency settings

- 1 Click **Dashboard Settings** in the Analytics Dashboard.
The Dashboard Settings page opens.

Dashboard Settings

Partner Currency Config

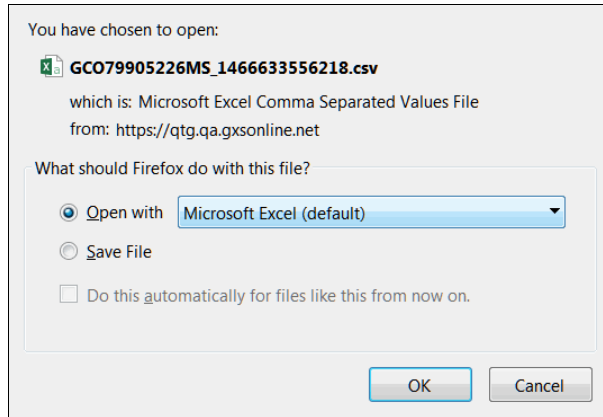
Download File : [List of partners to set default currency](#) [Valid Currency Lookup](#)

Upload File : No file selected.

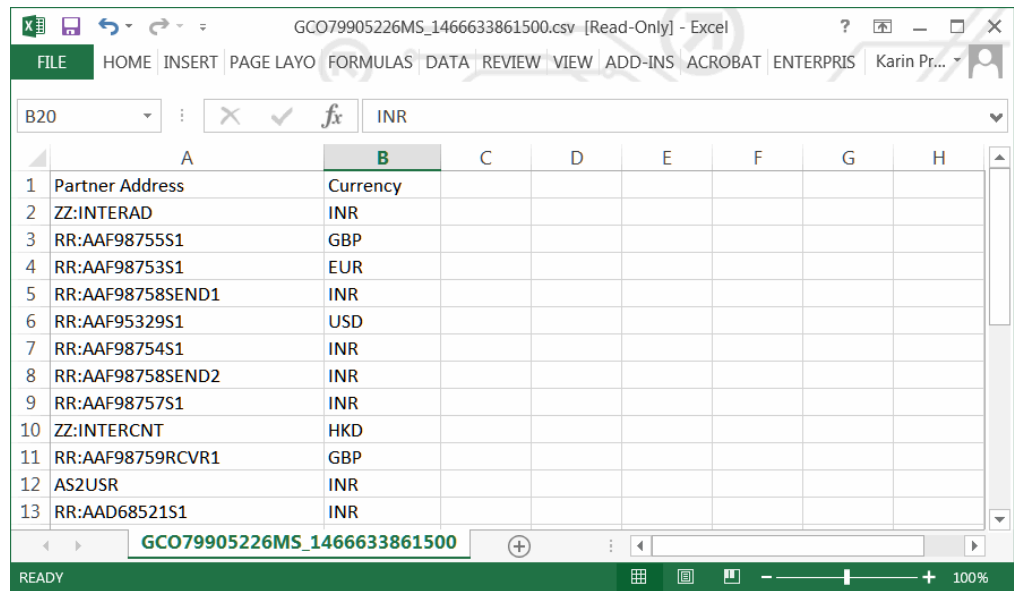
Top Products by Invoiced Amount

Default Qualifier :

- 2 Click **Download File: List of partners to set default currency** to generate a .csv file.
- 3 Follow the prompts to open the .csv file.



The .csv file opens.



- 4 Set the default currencies in the .csv file.
- 5 Click **Save** and specify the location for the file.
- 6 After saving the .csv file, click **Browse** in the Partner Currency Config dialog box to select the file.
- 7 Click **Upload**.

The system automatically runs the default currencies that you set for the trading partners.

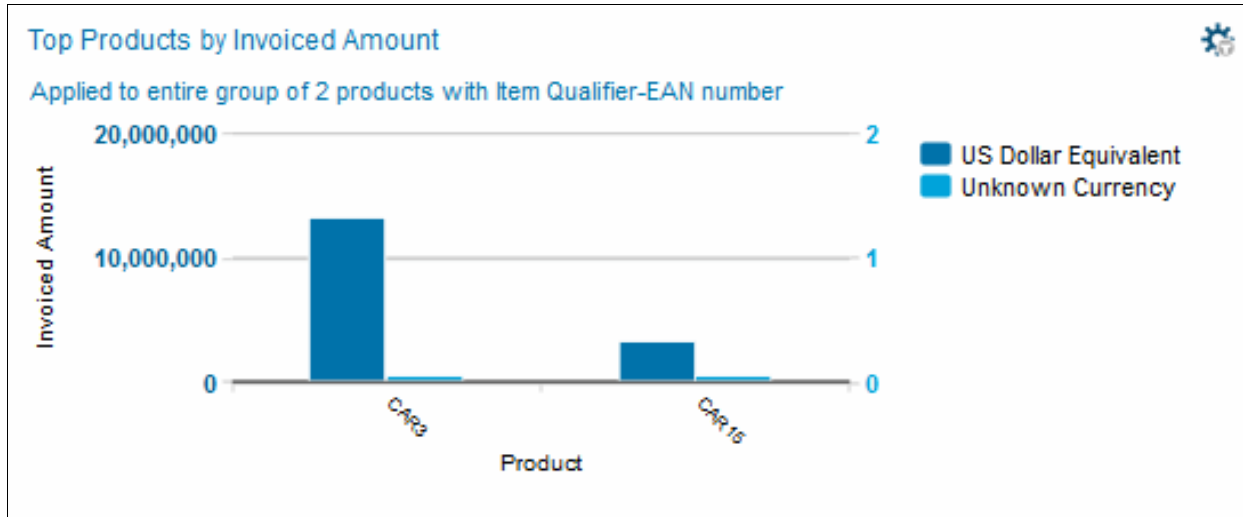
Note: This step involves a batch process, which might result in a time delay of up to 12 hours before the set currencies are updated for the Trading Partner.

Default Item Qualifier Settings

For the Top Products by Invoiced Amount metric, you can configure the Analytics Dashboard to display data for a specific qualifier.

Note: Whereas setting the Item Qualifier from the Filter By page sets the default view at the user level, this additional filtering capability sets the default view for an entire organization.

For example, if the default was set to EN - EAN Number, each time a company user refreshes the Analytics the Dashboard, the graph for the Top Products by Invoiced Amount metric displays data relevant to the EAN Number.



However, you might want to change this view for a different qualifier, such as UPC code. Through the Dashboard Settings page, you can configure the Analytics Dashboard to always display data for the new qualifier.

To configure default Item Qualifier settings

- 1 Click **Dashboard Settings** in the Analytics Dashboard.
The Dashboard Settings page opens.

Dashboard Settings

Partner Currency Config

Download File : [List of partners to set default currency](#) [Valid Currency Lookup](#)

Upload File : No file selected.

Top Products by Invoiced Amount

Default Qualifier :

- 2 Select the new qualifier from the Default Qualifier drop-down menu.

The screenshot shows the 'Dashboard Settings' page. Under the 'Partner Currency Config' section, there are links for 'List of partners to set default currency' and 'Valid Currency Lookup', and an 'Upload File' section with a 'Browse...' button, 'No file selected.' text, and an 'Upload' button. The 'Top Products by Invoiced Amount' section features a 'Default Qualifier' dropdown menu. The menu is open, showing a list of qualifiers. The current selection is 'UI - UPC consumer package code (1-5-5)'. The option 'UP - UPC (Universal product code)' is highlighted in blue. Other visible options include BP - Buyer's part number, CB - Buyer's catalog number, EN - EAN number, EWC - European Waste Catalogue (GS1 Temporary Code), GLN - Global Location Number (GS1 Temporary Code), IN - Buyer's item number, IT - Buyer's style number, MG - Manufacturer's part number, NB - Batch number, PI - Purchaser's item code, PV - Promotional variant number, SA - Supplier's article number, SK - Stock keeping unit (SKU), SN - Serial number, SRV - GS1 Global Trade Item Number, and VN - Vendor's item number.

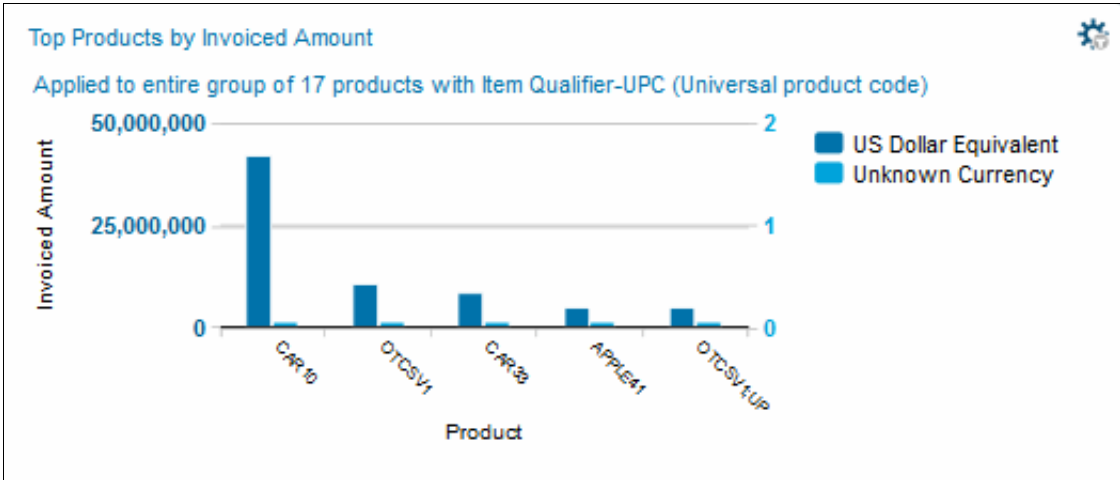
- 3 Click **Apply**.

A confirmation message displays.

A confirmation message dialog box is displayed with the text 'Successfully updated the default qualifier :UP' and an 'OK' button.

- 4 Click **OK**.

The Analytics Dashboard updates the Top Products by Invoiced Amount graph with the new default qualifier data.



Formerly known as Intelligent Web Forms (IWF), Document Manager is a data management tool that allows you to manage and trade business-to-business (B2B) e-commerce documents, including Purchase Orders, Invoices, Ship Notices, and Remittance Advice forms, easily and efficiently.

This chapter explains how to use Document Manager with either a forms viewer or with viewerless forms. Topics include:

- [“Overview” on page 207](#)
- [“Document Manager Inboxes and Sendboxes” on page 211](#)
- [“View Documents and Attachments” on page 222](#)
- [“Create New Documents” on page 224](#)
- [“Upload Documents to Document Manager” on page 234](#)
- [“Create and Send Ship Notices with Labels” on page 236](#)
- [“Send Documents and Files” on page 254](#)

Overview

Document Manager Features

Document Manager provides the following features:

- **Message Dashboard** — View up-to-date summaries about sent and received documents, alerts, and customer notifications. See [“Message Center” on page 12](#).
- **Intelligent Search Options** — Search for items by document number, document type, trading partner, date, status, and more.
- **ASN, Barcode, and Packing Options** — Manage customer ASN requirements, pack shipments, and create customer-compliant shipping labels efficiently without the need to purchase and maintain additional software.
- **Customizable Business Rules** — Built-in data validation, pre-populated forms and template capabilities increase data accuracy and minimize data entry errors.
- **Export Capabilities**— Options to export data as a Comma-Separated Value (CSV) file to an Excel spreadsheet or other database application.

Hardware Requirements

OpenText recommends the following hardware components as a minimum for good performance:

Hardware Component	Recommended
Processor	■ 3GHz Dual-core
Memory	■ 2GB

Forms Viewer

Your system might use document forms that require a forms viewer, or it might use viewerless forms that do not require a viewer.

If your system requires a forms viewer, you must first download and install a supported application to view, create, and edit business documents.

Note: If your system does not require a forms viewer, please skip this section.

Supported Forms Viewers

Document Manager currently works with the following viewers:

Forms Viewer	Supported Platforms
IBM Lotus Forms Viewer 3.5.1	<ul style="list-style-type: none"> ■ Windows XP Professional ■ Windows XP Tablet PC ■ Windows Vista
IBM Lotus Forms Viewer 3.5.1.2	<ul style="list-style-type: none"> ■ Windows XP Professional SP3 ■ Windows 7 (32-bit).
IBM Forms Viewer 8.0.1	<ul style="list-style-type: none"> ■ Windows 7 Enterprise and Professional (32- or 64-bit). Tablet PC supported. ■ Windows Vista Business, Enterprise, and Ultimate (32- or 64-bit). ■ Windows XP Professional (32- or 64-bit). <p>Browser Requirements</p> <p>IBM Form Viewer 8.0.1 supports the following browsers:</p> <ul style="list-style-type: none"> ■ Internet Explorer 9 and 10 ■ Firefox 22 (and previous versions).

Forms Viewers Installation

If you try to view a document and do not have a supported forms viewer installed, the system prompts you to download and install the default viewer (IBM Lotus Forms Viewer).

Document Manager

Inbox : Document Inbox → ORDER 1297425

View Document

Actions | PDF | XML | CSV

Trading Partner:	"DMNODE12HUB TEST-1 @" ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	Received Date:	Tuesday, May 24, 2016 06:37:55 GMT
Document Type:	ORDER	Read Date:	Tuesday, May 31, 2016 06:37:10 GMT
Document ID:	1297425	Version:	29

Software Download Required


You will need to download the Document Viewer to open and view a document.

- Step 1-** Download the software by clicking on the "Download Now" button.
- Step 2-** Follow the installation wizard.
- Step 3-** Upon completion of the installation, you **MUST close all browsers** before the installation can take effect.
- Step 4-** Re-login to Trading Grid Online.

Before you proceed, please [print the detailed instructions](#).

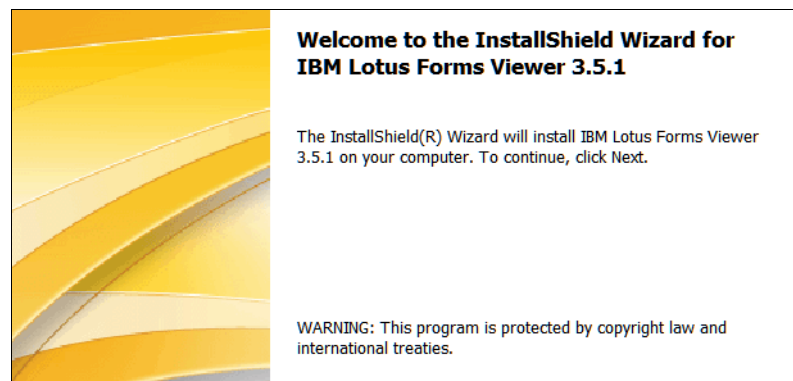
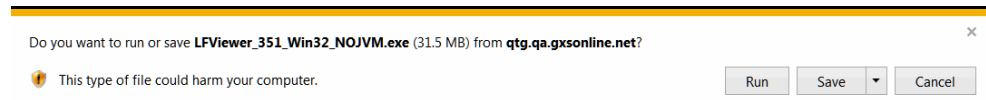
Download Details

File Size:	28.9 MB	
Estimated Time: T1 (1.5M)		about 3 minutes
DSL/Cable (256K+)		about 15 minutes
Dial-up (56K)		about 68 minutes

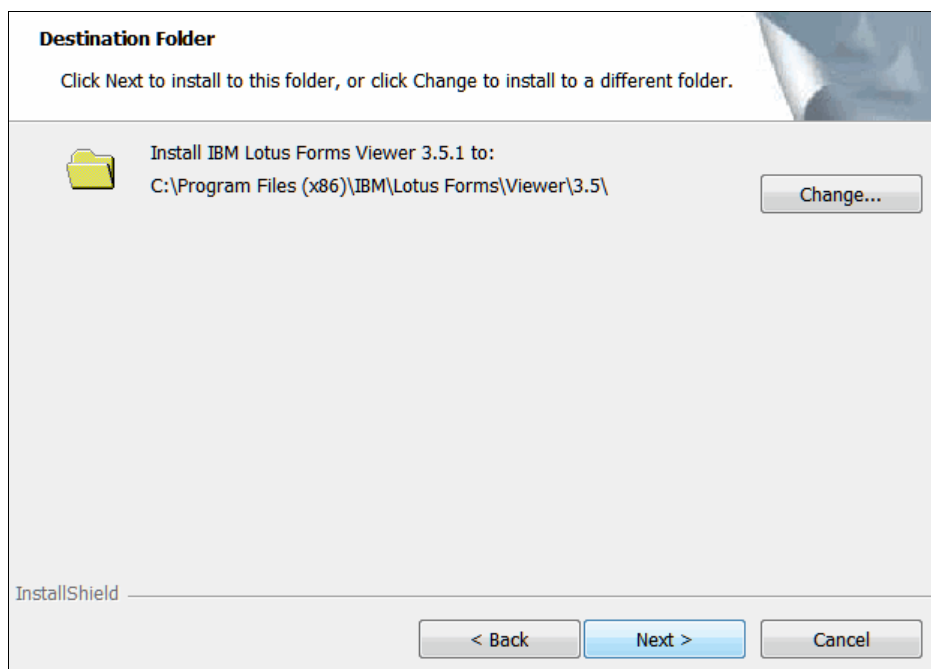
(For problems, contact GXS support by clicking the icon  on the top right corner.)

To download and install the Document Viewer

- 1 When prompted to download the default view, click **Download Now**.
- 2 Click **Run** to accept the download and begin running the InstallShield Wizard.lick **Run** to accept the download and begin running the InstallShield Wizard.



- 3 At the next prompt, click **Yes**.
- 4 At the next prompt, select a language, and click **OK**.
- 5 When the Installation Wizard opens, click **Next**.
- 6 Accept the terms of the license agreement, and click **Next**.
- 7 Specify the destination folder for the installation, and click **Next > Install**.



- 8 Click **Finish** to complete the installation.
- 9 Close all browsers, then login into Trading Grid Online to view documents.

Document Manager Inboxes and Sendboxes

Use the Document Manager Inboxes and Sendboxes to track and manage transactions with your trading partners. This section describes the following inbox and sendbox tools:

- **Document Inbox.** See “Document Inbox” on page 211.
- **File Inbox.** See “File Inbox” on page 213.
- **Document Sendbox.** See “Document Sendbox” on page 214.
- **File Sendbox.** See “File Sendbox” on page 217.

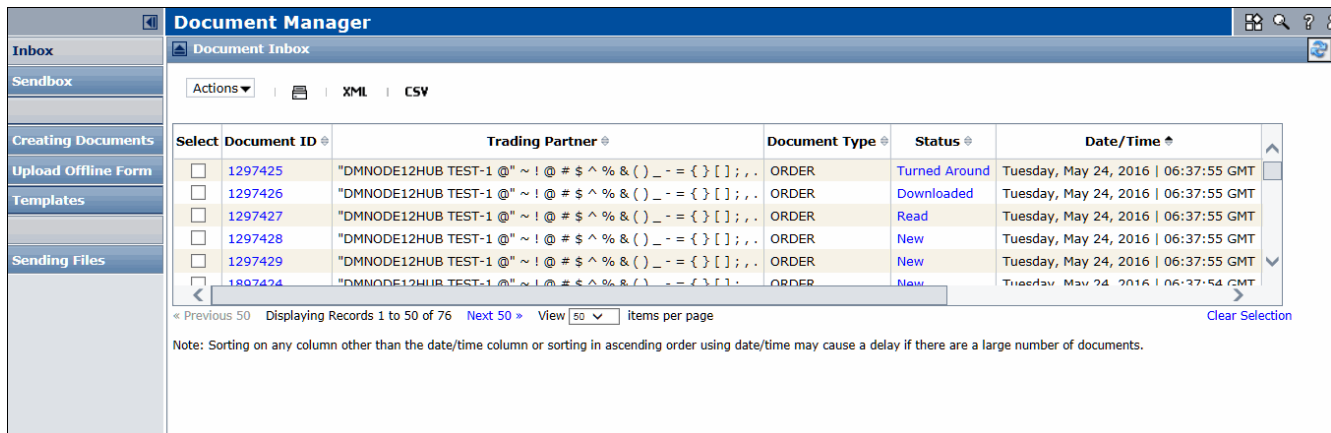
Document Inbox

The Document Inbox lists all documents received from your trading partners in the last 45-days.

To use your Document Inbox

- 1 Click the **Document Manager** tab.
- 2 Click **Inbox** from the Navigation Panel.

The Document Inbox opens.



Note: When you open the Document Inbox, the File Inbox also opens.

Document Inbox Information

The Document Inbox provides the following information.

Document Inbox Column	Description
Document ID	A number that identifies the document. Click this number to view the document content.
Trading Partner	The EDI address of the Trading Partner that sent the document.
Document Type	Indicates if the document is a Purchase Order, Invoice, Remittance Advice, Ship Notice, or Purchase Order Acknowledgment.

Document Inbox Column	Description
Status	The current state of a document. Click the Status link to view the status information. See “Document Inbox Statuses” on page 212.
Date/Time	The date and time when the current status was applied.
Days Before System Deletion	The number of days until the system deletes a document. Documents can be stored in your Inbox for 45 days. Important: The system deletes Inbox items automatically after 45 days. Deleted items cannot be retrieved.
Comment	Text comments provided by the user, Trading Partner, or both. Click the text to read the entire comment. See “View or Add Comments to Documents and Files” on page 220.
Document Version	The Document Manager version number of the document. The system retains previous versions of inbound and outbound documents, but only the latest version of files. It creates a new document version each time a document is sent or received.

Document Inbox Statuses

The **Status** column in the Document Inbox shows the current state of a document, based on four status levels:

- **New** - The document has not been opened yet.
- **Read** - The document was opened.
- **Downloaded** - The document contents were downloaded to your desktop.
- **Turned Around** - A new document was created based on the current document. For example, if an Invoice turned around from an Order, a status history indicates the Document ID, turnaround type, and creation date and time.

To view the status of documents in your inbox

- 1 Click the link in the **Status** column for the document.

Select	Document ID	Trading Partner	Document Type	Status
<input type="checkbox"/>	1297425	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	ORDER	Turned Around
<input type="checkbox"/>	1297426	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	ORDER	Downloaded
<input checked="" type="checkbox"/>	1297427	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	ORDER	Read

The Document Status page opens.

Document 1297427 Status				
Status	Date/Time	User Id	User First Name	User last Name
New	Tuesday, May 24, 2016 06:37:50 GMT			
Read	Thursday, June 02, 2016 06:51:42 GMT	DMNODE12TP@gxs.com	DMNODE12TP	DMNODE12TP

The Document Status page provides the following information about items in your inbox.

Status Information	Description
Status	The current status of the document (New, Read, Downloaded, Turned Around).
Date/Time	The date and time that the document was received.
User ID	The ID of the user who opened the document or the last user to modify it. <ul style="list-style-type: none"> ■ A User ID does not display if the current status of a document is New. ■ A User ID does not change if a different user opens a document unless that user takes an action to change the document status.
User First Name	The first name of the person associated with the User ID.
User Last Name	The last name of the person associated with the User ID.

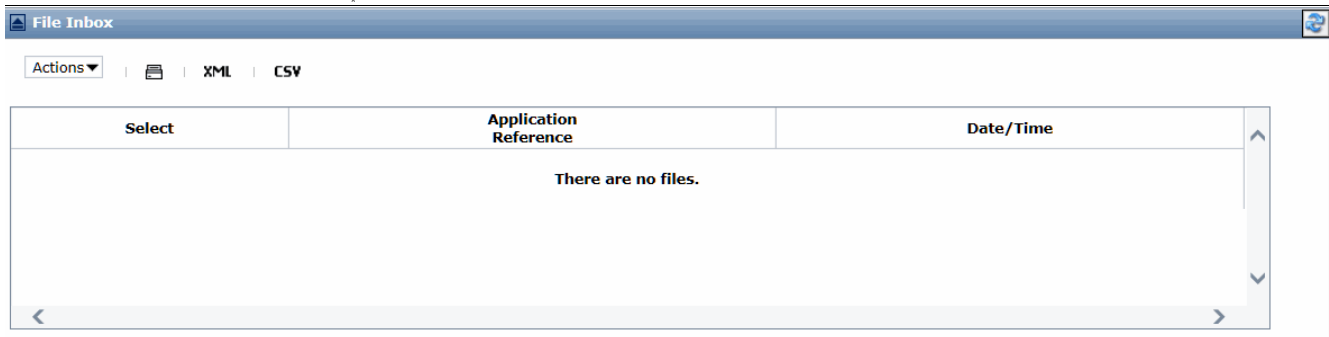
File Inbox

The File Inbox lists all files that you have received from your trading partners in the last 45-days.

To use your File Inbox

- 1 Click the **Document Manager** tab.
- 2 Click **Inbox** from the Navigation Panel.

The File Inbox opens.



Note: When you open the File Inbox, the Document Inbox also opens.

The File Inbox provides the following information.

File Inbox	Description
Application Reference	The type of file that was received.
Date/Time	The date and time that afile that was received.

Document Sendbox

The Document Sendbox lists all documents that you have created, saved, or sent within a 45-day period.

To access your Document Sendbox

- 1 Click the **Document Manager** tab.
- 2 Click **Sendbox**.

The Document Sendbox opens.

Select	Document ID	Trading Partner	Document Type	Status	Modified
<input type="checkbox"/>	"EDIT !@#\$\$%^&*("	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	INVOICE	Translation Error	Tuesday, May 3
<input type="checkbox"/>	teas1	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	INVOICE	Translation Error	Tuesday, June 1
<input type="checkbox"/>	test24may123112	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	INVOICE	Translation Error	Tuesday, June 1
<input type="checkbox"/>	test24may1231	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	INVOICE	Translation Error	Thursday, May 2
<input type="checkbox"/>	1463559380031	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	INVOICE	Saved	Wednesday, Jun

< Previous 5 Displaying Records 1 to 5 of 11 Next 5 > View 5 items per page [Clear Selection](#)
 Note: Sorting on any column other than the date/time column or sorting in ascending order using date/time may cause a delay if there are a large number of documents.

Note: When you open the Document Sendbox, the File Sendbox also opens.

Document Sendbox Information

The Document Sendbox provides the following information.

Sendbox Column	Description
Document ID	A number that identifies the document. Click this number to view the document content.
Trading Partner	The EDI address of the Trading Partner that receives the document.
Document Type	Indicates if the document is a Purchase Order, Invoice, Remittance Advice, Ship Notice, or Purchase Order Acknowledgment.
Status	The current state of a document in the sendbox. Click the link in the Status column to view a document's history or file activity such as when a file was opened such as when you took action to an item in your sendbox. See " Document Sendbox Statuses " on page 215.
Modified Date/Time	The date and time when the document was revised after it was first saved.
Days before System Deletion	The number of days until the system deletes a document. Documents can be stored in your Inbox for 45 days. Important: Deleted items cannot be retrieved.
Comment	Text comments provided by the user, Trading Partner, or both.

Sendbox Column	Description
Document Version	The Document Manager version number of the document. The system retains previous versions of inbound and outbound documents, but only the latest version of files. Each time a document is sent or received, it creates a new document version.
Document Attachments	Indicates if attachments are provided with the document.
Date/Time	The date and time when the current status was applied. See "Document Sendbox Statuses" on page 215.

Document Sendbox Statuses

The **Status** column in the Document Sendbox shows the current state of sent documents. Items in your Document Sendbox can be one of the following statuses.

- **Saved** - A document has been created or updated and saved, but not been sent. You must now open the item to send it.
- **Packing** - An Advanced shipping notice (ASN) is in process of being packed.
- **Packed** - ASN has been packed. To send an unopened document, check the check box. Then, click **Actions > Send**.
- **Submitted** - Sending a document for the first time submits it to Trading Grid Online, which then checks for errors.
 - If there are no errors, the system sends the document, and the status changes to Sent.
 - If there are errors, the items's status changes to Failed, and the document cannot be sent.
- **Sent** - A document was delivered to the receiver successfully.
- **Failed** - Trading Grid Online could not send the document due to errors.
 - Click the **Failed** status link to view the errors.
- **Resent** - A document was resent successfully.
- **Resubmitted** - Re-sending a document due to errors, updates, etc., submits it to Trading Grid Online, which then checks for errors.
 - If there are no errors, the system sends the document, and the status changes to Sent.
 - If there are errors, the items's status changes to Failed, and the document cannot be sent.
- **Validated** - The document form is saved and ready to send.
 - To send it unopened, check the check box name, and click **Actions > Send**.

- **Translation** - (For translation subscriptions.) The document is in the translation process.

Translation Statuses

- **Translation Complete** — The translation completed successfully.
- **Translation Error** — An error prevented the translation from completing successfully. For example, empty mandatory fields, non-numeric data in a numeric field, or missing segments cause a translation to fail.
- **Translation Failed** — An error prevented the translation. For example, the sender and receiver addresses do not match a profile in the system, so the translator cannot call a map.
- **Send Failed** — The document was not sent due to an error.
- **Acknowledged** — The buyer sent an acknowledgement file (for example, 997 or CONTRL) in response to receiving the document.
- **Delivered** — The document was delivered successfully.
- **Redelivered** — The document was redelivered successfully.

To view the status of a document in your sendbox

- 1 Click the link in the **Status** column for the file you want to open.
 The Document Status page opens.

Status	Date/Time	User Id	User First Name	User last Name
Submitted	Tuesday, May 24, 2016 05:46:25 EDT	DMNODE12TP@gxs.com	DMNODE12TP	DMNODE12TP
In Translation	Tuesday, May 24, 2016 05:46:25 EDT			
Translation Error	Tuesday, May 24, 2016 05:46:27 EDT			

File Sendbox

The File Sendbox lists all document files that you have created, saved, or sent within a 45-day period.

To access your File Sendbox

- 1 Click the **Document Manager** tab.
- 2 Click **Sendbox**.

The File Sendbox opens.

Select	Number	Trading Partner's ID	Trading Partner	Application Reference	Senders Reference	Status	Modified Date/Time	Days Before System Deletion
<input type="checkbox"/>	1	DMNODE_12HUB(1)	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	12	13	Sent	Tuesday, June 14, 2016 07:14:17 EDT	
<input type="checkbox"/>	2	DMNODE12~ ! @ # \$ ^ % & () _ - =	"DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .	1	1464866507914	Saved	Tuesday, June 14, 2016 02:37:04 EDT	

Navigation: < Previous 5 | Displaying Records 1 to 5 of 39 | Next 5 > | View 5 items per page

Note: When you open the File Sendbox, the Document Sendbox also opens.

File Sendbox Information

The File Sendbox provides the following information.

Status Information	Description
Number	A number generated by the system. Click this number to view the file contents.
Trading Partner's ID	The EDI address of the Trading Partner that sends or receives a file.
Trading Partner	The EDI address of the Trading Partner that that sends or receives a file.
Application Reference	The type of file sent.
Senders Reference	The sender's Transmission Reference number, which serves as an identifier for the file or the interchange control number.
Status	The status of a file in the sendbox.
Modified Date/Time	The date and time when the file was revised after it was first saved.
Days Before System Deletion	The number of days until the system deletes a file. Files can be stored in your Inbox for 45 days. Important: Deleted items cannot be retrieved.
Comment	Text comments provided by the user, Trading Partner, or both.
Date/Time	The date and time when the current status was applied. See "File Sendbox Status Information" on page ? .





File Sendbox Statuses



The **Status** column in the File Sendbox shows the current state of sent files. Items in your File Sendbox can be one of the following statuses.

- **Sent** — The file was sent successfully.
- **Saved** — The file has been saved.
- **Submitted** — The file has been submitted.

Inbox and Sendbox Navigation Tips


Below are tips for performing common tasks from your Inboxes and Sendboxes.

To	Inbox/Sendbox	Do this
View or add comments	Document Inbox Document Sendbox File Sendbox	Click the text in the Comment column. See “View or Add Comments to Documents and Files” on page 220.
Sort items in a column.	All	Click the column header. See “Sort Items in a Column” on page 219.
Print an item.	All	Click  .
Save an item as an .xml file.	All	Click  .
Download an item as a .csv file.		Click  .
Specify how many of items appear on a page.	Document Inbox Document Sendbox File Sendbox	Select the number from the View drop-down menu.
Search for Inbox and Sendbox items.	All	Click  . See “Search for Documents and Files” on page 220.
View a document.	Document Inbox	Do one of the following: <ul style="list-style-type: none"> ■ Click the link in the Document ID column. ■ Check the Select the check box for the document. Then, click Actions > View.
View a file.	File Sendbox	Click the file link in the Number column, then select the application to use for opening the file.
Save a document (or multiple documents) as a .pdf file.	Document Inbox Document Sendbox	<ol style="list-style-type: none"> 1 Check the check box next to the document. 2 Click Actions > Generate PDF.
Download and save files	File Inbox File Sendbox	Do one of the following: <ul style="list-style-type: none"> ■ Click the file link in the Number column. ■ Select the file, and click Actions > Download. 3 Click Save in the File Download dialog box. 4 Specify where you want to save the file.
Send an unopened document or file.	Document Sendbox	<ol style="list-style-type: none"> 1 Check the Select check box next to the document. 2 Click Actions > Send. <p>Note: Only document(s) with status of Packing/Packed/Validated can be sent from the sendbox.</p>

To	Inbox/Sendbox	Do this
Delete items.	All	Trading Grid Online removes documents and files from your Inbox after 45 days and deletes them from the system. To delete documents or files before the 45-day period: <ol style="list-style-type: none">1 Open the Document Inbox or File Inbox.2 Check the Select check box next to the document or file. You can select on multiple pages.3 Click Actions > Delete.4 Click OK in the confirmation prompt.
Increase or decrease the scroll height of a long document.	All	To decrease the scroll height, click  . To increase the scroll height, click  .

Sort Items in a Column

By default, each list in a column are sorted in ascending order, either by Document ID or File Number. They can be resorted if there is an arrow icon in the column heading, as shown below.


Document ID 
1297425
1297426
1297427
1297428

To resort a column:

- 1 Click the column header.
- 2 Click again to sort the list in descending order. The arrow indicates ascending or descending.

Note: If there are a large number of documents, sorting a column other than Date/Time, or sorting in ascending order by Date/Time, might cause a processing delay.

Search for Documents and Files

- 1 Click .
- 2 Set the search criteria on the search page.





Document Sendbox Search	File Sendbox Search
Document ID: <input type="text"/> Trading Partner: <input type="text"/> Document Type: <input type="text" value="Select a document"/> Status: <input type="text" value="Select a Status"/> Date From: <input type="text" value="29"/> <input type="text" value="June"/> <input type="text" value="2016"/> Date To: <input type="text" value="29"/> <input type="text" value="June"/> <input type="text" value="2016"/> <input type="button" value="Submit Search"/> <input type="button" value="Clear"/>	Trading Partner's ID: <input type="text"/> Trading Partner: <input type="text"/> Application Reference: <input type="text"/> Senders Reference: <input type="text"/> Status: <input type="text" value="Select a Status"/> Date From: <input type="text" value="29"/> <input type="text" value="June"/> <input type="text" value="2016"/> Date To: <input type="text" value="29"/> <input type="text" value="June"/> <input type="text" value="2016"/> <input type="button" value="Submit Search"/> <input type="button" value="Clear"/>


- 3 Click **Submit Search**.
- 4 The search results page displays.

Note: The **Document Type** options might include types for both Inboxes and Sendboxes.

View or Add Comments to Documents and Files

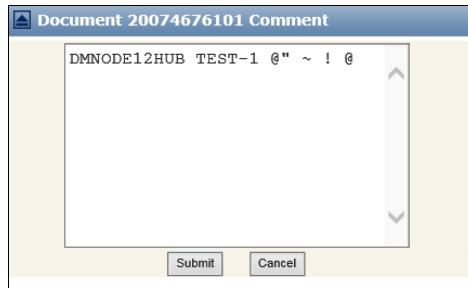
If a user or Trading Partner adds comments to a document, the beginning text of the comment displays in the **Comment** column.

Status	Date/Time	Days Before System Deletion	Comment	Document Version
Turned Around	Tuesday, May 24, 2016 06:37:55 GMT	25	DMNODE12HUB TEST-1	29
Downloaded	Tuesday, May 24, 2016 06:37:55 GMT	25		29
Read	Tuesday, May 24, 2016 06:37:55 GMT	25		29
Read	Tuesday, May 24, 2016 06:37:55 GMT	25		29
Read	Tuesday, May 24, 2016 06:37:55 GMT	25		29

A blank page icon  in this column indicates that there are no comments for a document.


To view comments in an inbox document

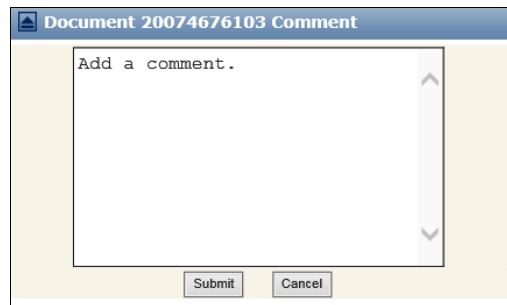
- 1 Click the text in the **Comment** column.
 The Document Comment dialog box displays the entire comment.






- 2 Click **Cancel** to close.

To add comments to an inbox document

- 1 Click  for the document that you want to add a comment to from the **Comment** column.
The Document Comment dialog box opens.
- 2 Type the new comment, and click **Submit**.



The new comment displays in the **Comment** column (of both the Document Inbox and Sendbox).


Status	Date/Time	Days Before System Deletion	Comment	Document Version
Turned Around	Tuesday, May 24, 2016 06:37:55 GMT	25	DMNODE12HUB TEST-1	29
Downloaded	Tuesday, May 24, 2016 06:37:55 GMT	25		29
Read	Tuesday, May 24, 2016 06:37:55 GMT	25	Add a comment.	29
Read	Tuesday, May 24, 2016 06:37:55 GMT	25		29
Read	Tuesday, May 24, 2016 06:37:55 GMT	25		29

Configure Inboxes and Sendboxes

You can configure the page display of the Document Manager Inboxes and Sendboxes to:

- View only specific columns.
- Specify the column order.
- Display Inboxes and Sendboxes on the Operations Center page.

To configure an Inbox or Sendbox list

- 1 Click the **Document Manager** tab.
- 2 Click  in the Document Manager title bar.

The Configure Document dialog box lists the Inbox or Sendbox columns that are the configurable.

Column Name	Order	Hide
Document Id	1	<input type="checkbox"/>
Trading Partner	2	<input type="checkbox"/>
Document Type	3	<input type="checkbox"/>
Status	4	<input type="checkbox"/>
Modified Date/Time	5	<input type="checkbox"/>
Days Before System Deletion	6	<input type="checkbox"/>
Comments	7	<input type="checkbox"/>
Document Version	8	<input type="checkbox"/>
User Id	9	<input checked="" type="checkbox"/>
User First Name	10	<input checked="" type="checkbox"/>
User last Name	11	<input checked="" type="checkbox"/>
Related Documents	12	<input checked="" type="checkbox"/>
Date/Time	14	<input type="checkbox"/>
Lot Size	5	<input type="checkbox"/>

3 Configure the Inbox or Sendbox, as needed, and click **Apply**.

To	Do this
Re-order the column display	Click the arrow in the Order column, and select a value for a column. For example, the value of 3 places a column as the third column on the page. The Inbox or Sendbox columns re-display in the new order (from left-to-right).
Hide or show columns	Check or uncheck the Hide check box for the columns you want to show or hide.
Show columns	Click its link to display a list of columns for an Inbox or Sendbox.
Set the number of rows to display at the bottom of the list.	Select a Lot Size value. The changes apply only to the selected Inbox or Sendbox.
Add an Inbox or Sendbox to the Operations Center	Check the appropriate check box in the Copy to Ops Center dialog box.

View Documents and Attachments

To view documents

- 1 Click the **Document Manager** tab.
- 2 Click **Inbox**.
- 3 Click the **Document ID** of the document you want to open.

Or, check the **Select** check box, and click **Actions > View**.

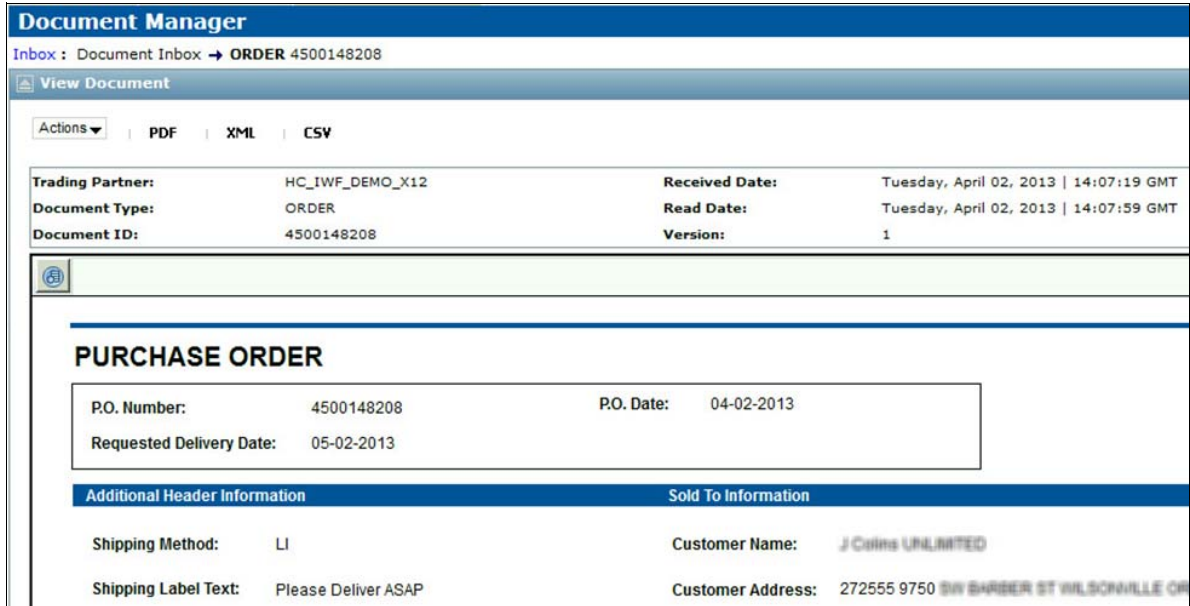
Select	Document ID	Trading Partner	Document Type	Status	Date/Time	Days Before System Deletion
<input type="checkbox"/>	4500148208	HC_IWF_DEMO_X12	ORDER	Read	Tuesday, April 02, 2013 14:07:19 GMT	39

- If your system requires a forms viewer, follow the prompts to download the default viewer. See ["Forms Viewer" on page 208](#).

The View Document page displays your document contents. The example below uses a Document Viewer form.

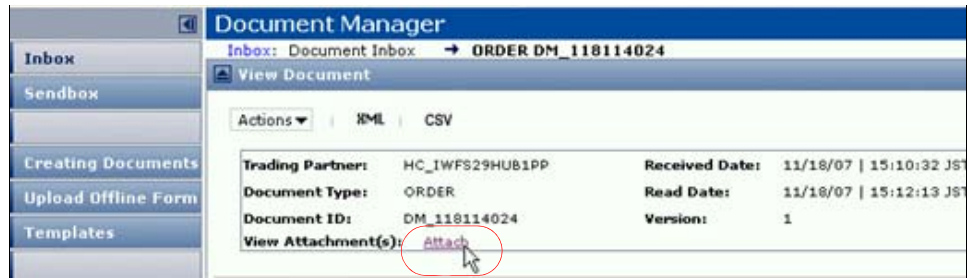
Note: The actual displays might vary by trading community.

The example View Document page below does not use a Document Viewer form.



To view document attachments

- 1 To view attachments from your Trading Partner, click the **Attach** link in the **View Attachment(s)** field.



- 2 Do one of the following:
 - Click the attachment you want to view in the Document Attachments dialog box.
 - Select the attachment, and click **Actions** > **Download** to download it to your computer.

Create New Documents

There are several ways to create new documents:

- Use a Turn Around Document
- Create a new document template
- Create a new document from an existing template

Create Turn Around Documents

To turn around a document, you use one document to create another. For example, you can open an Order and create a turnaround Invoice or Ship Notice that uses data from the Order.

You can turn around up to 50 documents in one action in Document Manager. The documents must be from the same trading partner and use the same turnaround document type such as ASN. Some communities require other values in the source documents to be the same, such as the Ship To code for an ASN.

When you turn around multiple documents, IWF updates the document status for all documents.

Note: OpenText Global Support configures the limit for the maximum number of documents that can be turned around at one time. Contact your trading partner or OpenText for more information or to increase this limit.

To turn around a document

- 1 Click the **Document Manager** tab.
- 2 Click **Inbox**.

Note: In some communities, you can turn around a document from the Document Sendbox, such as an ASN to an Invoice. To do so, use this procedure with the Document Sendbox instead of the Document Inbox.

- 3 In the **Document Inbox**, check the appropriate check box for the document you want to turn around. You can also select multiple documents from multiple pages.
- 4 Click **Actions > Turn Around**.



The Turn Around Document dialog box prompts you to select the type of document to create, for example, ASN.

- 5 Select the template for the document type from the **Template** drop-down menu. Then, click **Submit**.

Note: This menu shows only if your system has available templates.

Document Manager ? ☰

Inbox: Document Inbox → **ORDER 1297429**

Turn Around Document

Please select type of document you want to turn around: INVOICE

A new document form opens in the Turn Around Document page. The form in the example below uses a forms viewer. The tabs represent sections of the form, for example, the Summary Information tab.

Document Manager ? ☰

Inbox : Document Inbox → 1297427


Turn Around Document

Trading Partner: "DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & Document Type: INVOICE
 Add Attachment(s) Attach () _ - = { } [] ; , .

100%

Header Information | **Summary Information**

Invoice

 Invoice Date: Total Invoice Amount: 0.00
 Invoice Number:
 Purchase Order Number: 1297427
 Vendor Number:

Ship To Party

Name: Circuit City Stores, Inc.
 CCS Distribution Code:

Terms of Sale

Terms Type Code: 01 - Basic Terms Discount Days Due:
 Terms Basis Date Code: 3 - Invoice Date Terms Net Due Date:
 Terms Discount Percent: Terms Net Days:
 Terms Discount Due Date: Terms Discount Amount:
 Description:

Line Item Information

The example form below does not use a forms viewer.

Document Manager
Inbox : Document Inbox → 4500148208
Turn Around Document

Trading Partner: HC_IWF_DEMO_X12 Document Type: INVOICE

Name is required. It should contain a minimum of 1 character and a maximum of 60 characters.

Send Save Save & Exit Cancel

INVOICE

Invoice Number:		PO Number:	4500148208
Transaction Date:	<input type="text"/> mm-dd-yyyy	PO Date:	04-02-2013 mm-dd-yyyy
Total Number of Line Items:	10	Terms Type:	
Invoice Total:	4828.45	Terms Basis:	

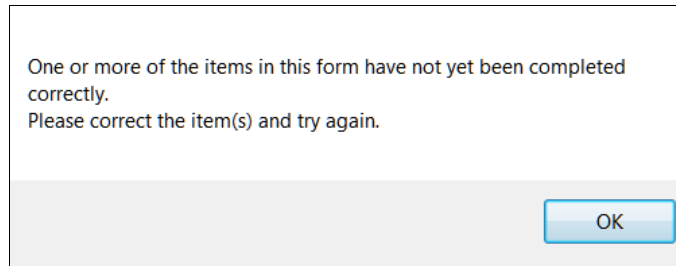
Vendor Information		Remit To Information	
Name:	JCQ Limited	SYN Enterprise	
ID Number:	1928236	Y018237	
Street Address:	777 BROOKS AVE		
City:	Holland		
State or Province:	MI		
Postal Code:	49423-5340		

Sold To Information		Ship To Information	
Name:	J. Colins UNLIMITED		
ID Number:	272555		
Street Address:	9750 SW BARBER ST		
City:	WILSONVILLE		
State or Province:	OR		
Postal Code:	97070-9233		

Additional Shipment Information
Shipment Method:
Description:

- Specify the information necessary for the turnaround document. Required fields are shaded yellow.
 - If a form uses a forms viewer with tabs, click the tab to specify the information that section of the form.
- Click **Save**.
- Continue to ["Optional Steps" on page 234](#).

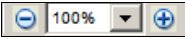
Note: If you save or send a new Turn Around document, or exit the page before completing all required fields, a warning prompts you to add the required information. Click **OK** to go back and complete the form.



Navigation Tips

Document Manager with Forms Viewer

Below are tips for navigating and performing common tasks if your system uses a forms viewer.

To	Do this
Zoom in or zoom out.	Use the magnification tools or select a magnification from the drop-down menu. 
Add line items.	Click Add Row .
Delete line items.	Check the appropriate check box in the item row, and click Delete . You can check multiple check boxes.
Attach a file to a document.	To attach a file to a document, you must save it first and then open the document from your Sendbox. See "Attach a File to a Document" on page 254.
Save the form to a specific location.	Click Save Form or Save to PC .
Submit a form for Approval.	For a Document Viewer form, either send the document or send it with approval, depending on how the form is designed for your trading community. Click Submit for Approval .
Print a form.	Open the printer dialog box to print the form, and click Print .

Document Manager without Forms Viewer

Below are tips for navigating and performing common tasks if your system does not use a forms viewer. .

To	Do this
Zoom in or zoom out .	Use the magnification tools.
Add line items .	Click Add Line Item .
Add a summary or charge to an Invoice.	Click Add Row .

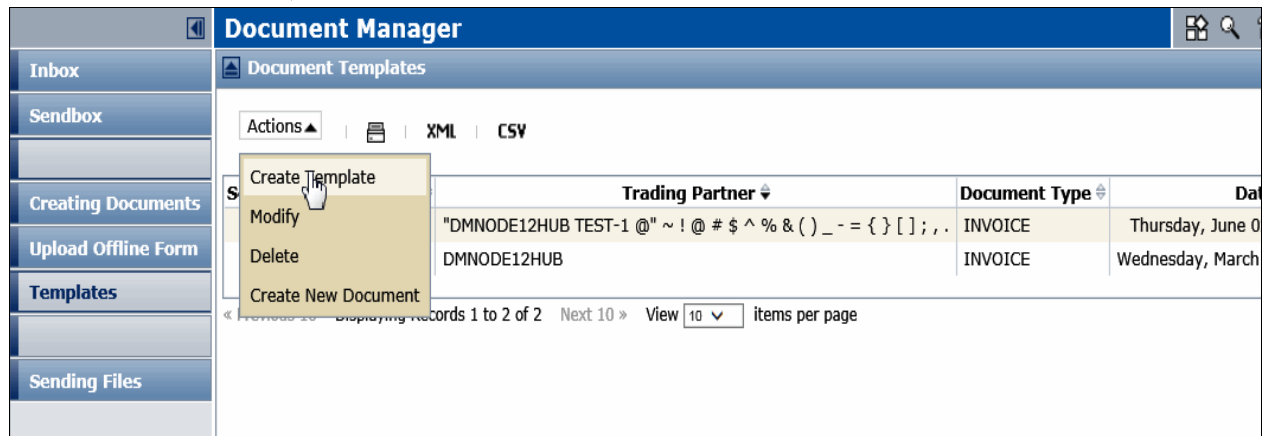
To	Do this
Delete line items.	Click Delete Line Item .
Attach a file to a document.	To attach a file to this document, you must save it first and then open the document from your Sendbox. See "Attach a File to a Document" on page 254.
Print a form.	Do one of the following: <ul style="list-style-type: none"> ■ Click Print. ■ Open the form as a PDF file, and print the PDF.

Create a New Template

A template is a file that serves as a starting point for a new document, in this case, a document form, which is pre-formatted in some way. When you open a template, it already contains certain information, such as an address you use each time you create a document of the same type. Using templates saves time when creating new documents or turning around existing documents.

To create a new document template

- 1 Click the **Document Manager** tab.
- 2 Click the **Templates** tab in the Navigation Panel



- 3 Click **Actions > Create Template**.

The Create New Template page opens.

Document Manager

Create New Template

* Indicates a required field

* **Trading Partner**

* **Document Type:**

* **Template Name:**

Allow others to use:

4 Do one of the following:

- In the **Trading Partner** field, type the company name of the Trading Partner that will receive the document.
- Click **Browse** to find the Trading Partner.
- a Select the Trading Partner from the list in the Trading Partner page.

Select	Partner Company Name	Partner ID	Your EDI Address	Partner EDI Address
<input type="radio"/>	"DMNODE12HUB TEST-1 @" ~!@#\$%^&()_-= { } [] ; , .	GC49233202AA	ZZ:DMNODE12TP	DMNODE_12HUB(1)
<input checked="" type="radio"/>	"DMNODE12HUB TEST-1 @" ~!@#\$%^&()_-= { } [] ; , .	GC49233202AA	ZZ:DMNODE12TP	ZZ:DMNODE12HUB
<input type="radio"/>	"DMNODE12HUB TEST-1 @" ~!@#\$%^&()_-= { } [] ; , .	GC49233202AA	ZZ:DMNODE12TP	Z:DMNODE@12HUB-1
<input type="radio"/>	"DMNODE12HUB TEST-1 @" ~!@#\$%^&()_-= { } [] ; , .	GC49233202AA	ZZ:DMNODE12TP	DMNODE12~!@#\$%^&()_-=

« Previous 5 Displaying Records 1 to 4 of 4 Next 5 » View items per page

b Click **Select**.

- 5 Select the type of document template to use from the **Document Type** drop-down menu, for example, such as Invoice.
- 6 Type a name for the new template in the **Template Name** field.
- 7 If you want other users to have access to the template, check the **Allow others to use** checkbox.
- 8 Click **Create**.

A new form opens. The example template below does not use a Document Viewer form.

Document Manager

Templates : →

Create Template

Trading Partner: "DMNODE12HUB TEST-1 @ ~ ! @ # \$ ^ % & () _ - = { } [] ; , .

Document Type: INVOICE

Template Name: Invoice Template

Ship To Customer is required.

Save Form Save Template

Coca-Cola
CUSTOMER BUSINESS SOLUTIONS
TRADE PROGRAMS | TRANSACTIONS | INTELLIGENCE

Invoice


All dates formatted as MM/DD/YYYY * = mandatory item ** = conditional item

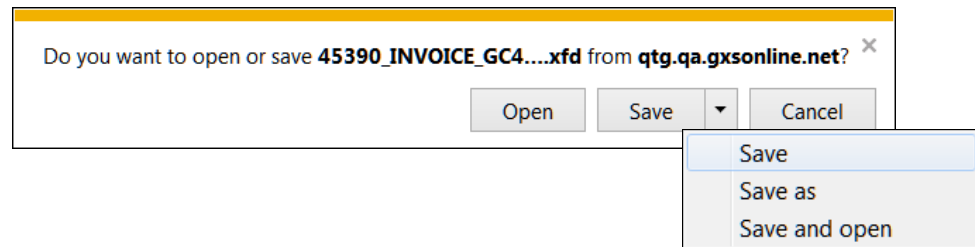
Header Information

Invoice Number: * Invoice Date: *
PO Number: * PO Date: *
Ship Date: *

Ship From Ship To * |

Location: * Location: *
Name: * Name: *
Vendor #: * DUNS #: *
Mkt. V. #: * Store #: *
Address: * Address: *

- 9 Click  to save the form template.
- 10 When prompted, do one of the following:
 - To open the form, click **Open** in the prompt.
 - To save the form, click **Save**, and select a save option.



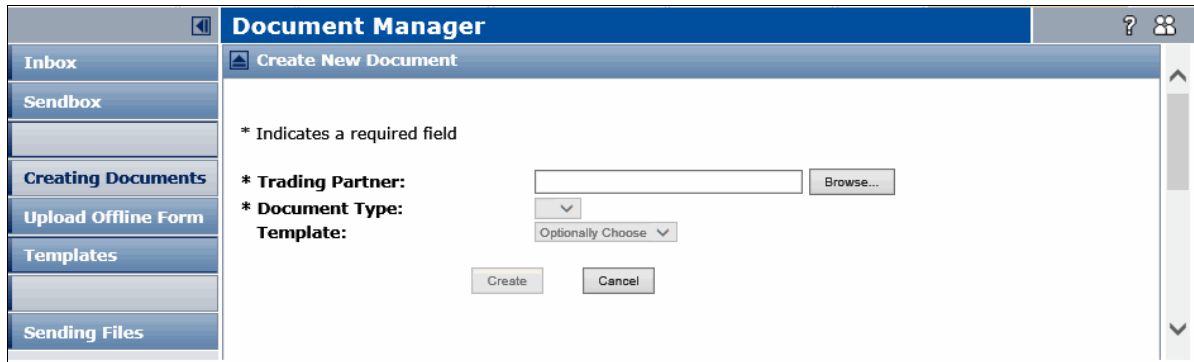
- 11 On the Document Templates page that displays, reorder the list by Date/Time to see your new template.
- 12 Continue to ["Optional Steps" on page 234](#).

Create a New Document from a Template

After creating a template, you can use it to create new documents, as needed.

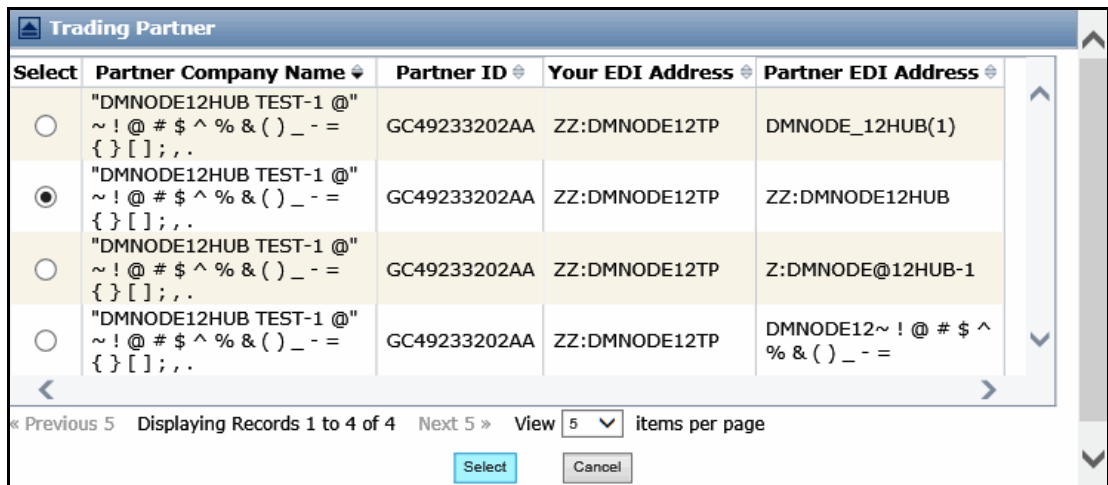
To create a new document from a template

- 1 Click the **Document Manager** tab.
- 2 Click **Creating Documents**.
- 3 The Create New Document page opens.



4 Do one of the following:

- In the **Trading Partner** field, type the company name of the Trading Partner that will receive the document.
- Click **Browse** to find the Trading Partner.
- a Select the Trading Partner from the list in the Trading Partner page.



b Click **Select**.

- 5 Select the type of document you want to create from the **Document Type** list such as an Invoice.
- 6 Select a template to use for creating the document from the **Template** list. Optional. Click **Create**.
A new document form opens.
- 7 Add the applicable information in the new document form.
 - Override the existing data in the fields, as needed for the new document.
 - If the form has tabs, such as an Item Information or Line Items tab, click the tab. Then, add the information to that part of the form.

The example page below uses a Document Viewer form.

Create New Document

Trading Partner: HC_IWFS29HUB3 Creation Date: 04/07/11 | 05:08:53 IST

Submit for Approval Save to PC Save Save & Exit Save Template Cancel Print

Header Information Item Information Admin

Purchase Order Number:
 Purchase Order Date: (yyyy-mm-dd)

Environment: browser
 Number of Items: 0
 Total Invoice Amount:

Invoice Identification

Invoice Number:
 Invoice Date: (yyyy-mm-dd)

Contact Identification

Contact Function: Phone or Fax Qualifier:

The example page below does not use a Document Viewer form.

Create New Document

Trading Partner: HC_IWF_DEMO_X12 Creation Date: Friday, April 05, 2013 | 15:57:25 GMT
 Document Type: INVOICE

Invoice Number is required. It should contain a minimum of 1 character and a maximum of 22 characters.

Send Save Save & Exit Save Template Cancel

INVOICE

Invoice Number: PO Number:
 Transaction Date: mm-dd-yyyy PO Date: mm-dd-yyyy
 Total Number of Line Items: 0 Terms Type:
 Invoice Total: 0.00 Terms Basis:

Vendor Information **Remit To Information**

Name:
 ID Number:
 Street Address:
 City:
 State or Province:
 Postal Code:

Sold To Information **Ship To Information**

Name:
 ID Number:
 Street Address:
 City:
 State or Province:

8 Click **Save**.

Note: If you try to save a document, or leave the page before completing all required fields, a warning message prompts you to add the required information.

- Click **No** to go back and complete the form.
 - Click **Yes** to save the form in its current state.
- 9 To attach a file to this document, you must first save it and then open the document from your Sendbox. See [“Attach a File to a Document” on page 254](#).
- 10 Continue to [“Optional Steps” on page 234](#).

Optional Steps

To	Do this
Immediately send the document to your Trading Partner.	Click Send . Your Document Sendbox displays your document with a Sent status with two exceptions: <ul style="list-style-type: none"> ■ ASN with Labels documents might have a Pack button instead of Send button because you must pack before sending. ■ If the document is sent to your trading partner for approval, the status displays as Pending Approval instead of Submitted or Sent.
Save the form, leave the form open to continue working, and add the document to your Document Sendbox, with a Saved (not Sent) status.	Click Save . Use this option if, for example, all mandatory fields are not completed.
Save and exit the form, and save the document in your Document Sendbox, where you can later send it.	Click Save & Exit . The document has a Saved status.
Close the form without saving it.	Click Cancel .
Save the form to your PC in a PFDF, XML, or CSV format.	Click the PDF, XML, or CSV icon.
Email a completed form.	<ol style="list-style-type: none"> 1 Click Email Form to attach the form to your message. 2 Add the recipient's email address in the email application, and click Send. <p>The recipient can now open the form in the Forms Viewer.</p>

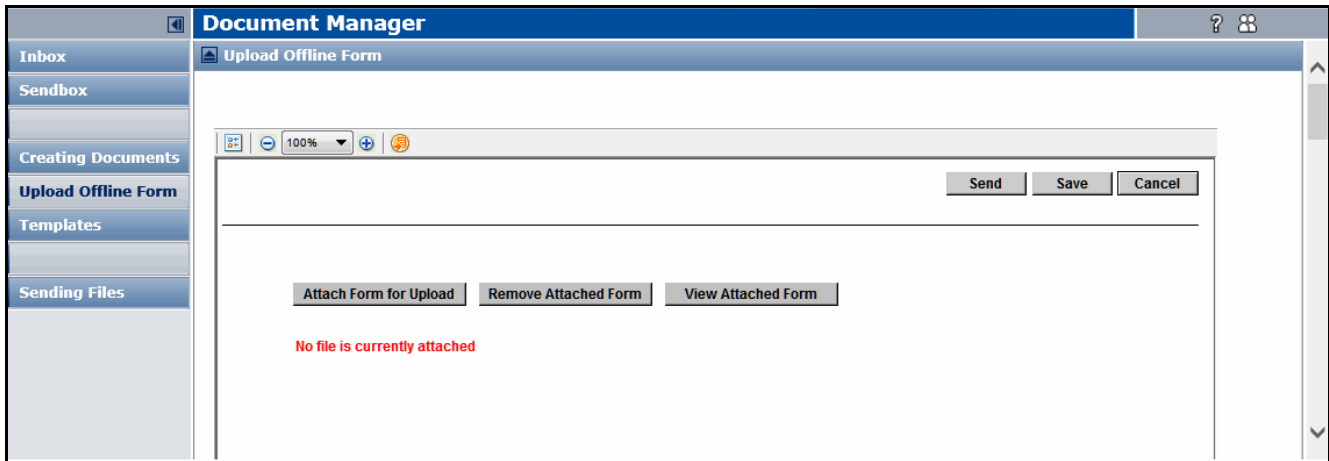
Upload Documents to Document Manager

You can also create a new form or document on your computer, and upload it to Document Manager.

To upload a document

- 1 Create a valid form on your computer desktop
- 2 Trading Grid Online only accepts valid forms.
- 3 Click the Document Manager tab.
- 4 Click **Upload Offline Form**.

5 On the Upload Offline Form page that opens, click **Attach Form for Upload**.



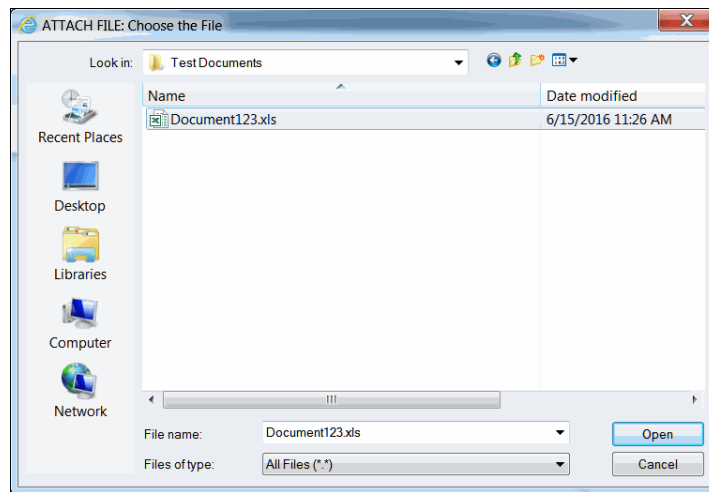
6 Click **Attach Form for Upload**.

7 Do one of the following:

- Specify the file location for the form.

Include the entire path, for example:

D:\My Documents\Test Documents\Document123.xml



- Browse to the file on your desktop.

8 Click **Open**.

9 To view the uploaded file and verify the form contents, click **View Attached Form**.

If the form is incorrect, click **Remove Attached Form**.

Create and Send Ship Notices with Labels

Creating and sending Ship Notices includes the following tasks.

- 1 Create a Ship Notice.
See [“Create a Ship Notice” on page 236](#).
- 2 Pack the shipment.
See [“Pack a Shipment” on page 239](#).
- 3 Print the shipping labels and reports.
See [“Print Shipping Labels and Reports” on page 252](#).
- 4 Save Your Packing Information and send the Ship Notice.
See [“Save Your Packing Information and Send the Ship Notice” on page 254](#).

Create a Ship Notice

You can create a new Ship Notice, or create one from a Turn Around document or an existing template.

To create a Ship Notice from a Turn Around document

- 1 Create a turnaround ASN document. See [“Create Turn Around Documents” on page 225](#).
- 2 Provide the required information in the new document form, using the correct data format.

To create a Ship Notice from a template

- 1 Create the ship notice from an ASN template. [“Create a New Document from a Template” on page 231](#).
- 2 Override the data in the fields as needed for this Ship Notice.
For example, if the document has tabs:
 - a Click the **Header** tab and provide all required information.
 - b Click the **Orders** tab and provide all required information.
 - c Select the **Line Items** tab and provide all required information.

To create a Ship Notice as a new document

- 1 Click Create **Creating Documents**. The Create New Document page opens.
- 2 In the Trading Partner field, type the name of the Trading Partner you are sending this document to, or click **Browse** to find and select the Trading Partner.
- 3 From the **Document Type** list, select **ASN with labels**.
- 4 (Optional) To create the Ship Notice from a template, in the **Template** list select a template.
- 5 Click **Create**.
The document form opens.
- 6 Provide the information in all required fields, using the correct data format.

The example page below uses a Document Viewer Form.

The screenshot shows the 'Document Manager' interface. The main content area is titled 'Miller Ship Notice/Manifest' and contains a 'Line Items' section. At the top of this section, there is a dropdown menu for 'Administrator' and a button labeled 'Add Row'. Below this is a table with the following columns: 'Select', 'Line #', '* Pick Quantity', '* Order Unit', '* Packs', '* Product #', '* Description', '* UPC Pack', and 'GTIN Pack'. The table contains five rows of data, each with a checkbox in the 'Select' column and a corresponding 'Add Row' button at the bottom of the table.

Select	Line #	* Pick Quantity	* Order Unit	* Packs	* Product #	* Description	* UPC Pack	GTIN Pack
<input type="checkbox"/>	1	10	CA	1	11	ITEM 1	111111111111	
<input type="checkbox"/>	2	20	EA	2	22	ITEM 2	222222222222	
<input type="checkbox"/>	3	30	CA	3	33	ITEM 3	333333333333	
<input type="checkbox"/>	4	40	EA	4	44	ITEM 4	444444444444	
<input type="checkbox"/>	5	50	CA	5	55	ITEM 5	555555555555	

The example page below does not use a Document Viewer Form.

Document Manager

Create New Document

Trading Partner: HC_IWF_DEMO_X12 **Creation Date:** Thursday, April 04, 2013 | 14:24:27 GMT

Document Type: SHIPMENT NOTICE

ASN Number:

Creation Date:

Creation Time:

ADVANCE SHIP NOTICE

SHIP FROM	SHIP TO
Name: <input type="text" value="ABC Company"/>	Name: <input type="text" value="XYZ Distribution Inc."/>
Address: <input type="text" value="920 PACKERLAND DR"/>	Distribution Center Number: <input type="text" value="X018237"/>
City: <input type="text" value="GREEN BAY"/>	Shipped Date: <input type="text" value="04/26/2013"/>
State: <input type="text" value="WI-Wisconsin"/>	
Postal Code: <input type="text" value="54303-4897"/>	
Bill of Lading Number: <input type="text" value="AC38377"/>	
Carrier Reference/PRO Number: <input type="text" value="REF282982"/>	
Internal Vendor Number: <input type="text" value="IN20138373"/>	

ORDER INFORMATION

Order No.: 521121411

Order Date: 03/26/2013

LINE ITEM DETAILS

Page 1 of 1

Select	Line Item #	CCS Model Number	UPC Code	Number of Units
<input type="checkbox"/>	1	ORDER1ITEM1	1111111111111111	10
<input type="checkbox"/>	2	ORDER1ITEM2	2222222222222222	20
<input type="checkbox"/>	3	ORDER1ITEM3	3333333333333333	30
<input type="checkbox"/>	4	ORDER1ITEM4	4444444444444444	40
<input type="checkbox"/>	5	ORDER1ITEM5	5555555555555555	50

To return to the document list page, click **Cancel**.

7 To add an item, in a Document Viewer form, click **Add Row**, or in a form that does not use Document Viewer, click **Add Line Item**.

8 Do one of the following:

- Continue to [“Pack a Shipment” on page 239](#).
- Click **Save** or **Save & Exit** to pack the document later.

After you save the document, it displays in **Document Sandbox**.

Pack a Shipment

Packing options vary by trading communities. The two main procedures are:

- “Pack Packages” on page 239
- “Pack Packages into Larger Units” on page 245

As you pack a shipment, messages might prompt you for missing information. For example, a Total Quantity Shipped field might require a value more than 0 or IWF might delete the item from the ASN.

Pack Packages

Use this procedure to pack first-level packing units in your shipment. Often, these are boxes or cartons.

To pack first-level packages into other packages, see “Pack Packages into Larger Units” on page 245 procedure.

OpenText recommends starting by packing the smallest packing units in the shipment, then packing those packages in the next level of packing, etc., until you finally pack the highest level, such as a pallet or container.

Note: Packing options, such as package types, vary by trading community. Some features described below might not be available in your trading community.

To pack packages

1 Do one of the following:

- After you specify the shipment information, click **Pack** in the ASN form.
- If you are returning to the ASN after saving it, open the Document Sendbox. Then do one of the following:
 - Click the ASN link in the **Document ID** column.
 - Check the check box for the ASN. Then, click **Actions** > **View/Modify**.

The Packing Screen opens.

The screenshot shows the 'Packing Screen' window in Document Manager. It features a table of items with columns for 'Item Details' and 'Quantity'. The table lists four items with their respective order, product, and supplier information, along with total and unpacked quantities. A red circle highlights the 'Filter By' dropdown menu. To the right of the table is an 'Add' section with a dropdown for 'Select Packaging type' and a 'Package(s):' dropdown. Below the table and 'Add' section are buttons for 'Auto Pack', 'Associate Package', 'Preview Packing', and 'Update Packing Info'. At the bottom of the window are buttons for 'Print Labels/Reports', 'Enter Attributes', 'Send', 'Save & Exit', and 'Cancel'.

	Item Details	Quantity
<input type="checkbox"/>	Order: 521121411 Product: ORDER1ITEM1 (Details) SKU: SupplierItemId: ORDER1ITEM1	Total:12 Unpacked:12
<input type="checkbox"/>	Order: 521121411 Product: ORDER1ITEM2 (Details) SKU: SupplierItemId: ORDER1ITEM2	Total:12 Unpacked:12
<input type="checkbox"/>	Order: 521121411 Product: ORDER1ITEM3 (Details) SKU: SupplierItemId: ORDER1ITEM3	Total:6 Unpacked:6
<input type="checkbox"/>	Order: 521121411	Total:12

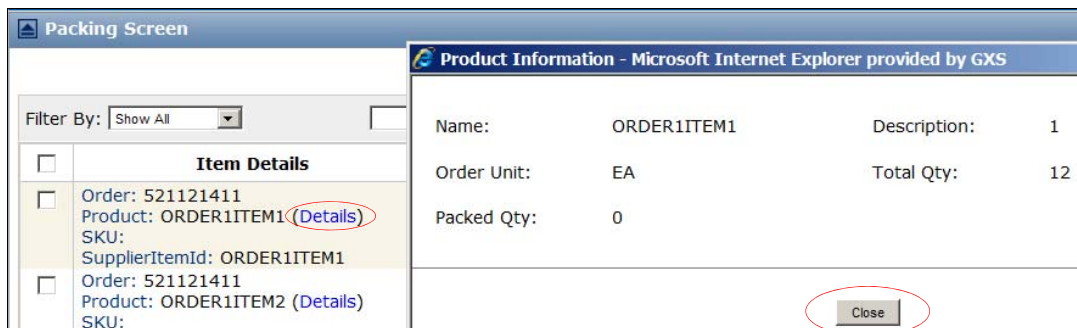
The left section displays order and item information, based on your selections in the “To create a Ship Notice from a Turn Around document” on page 236 procedure. For each line item, the **Quantity** column displays the total number of units of the line item and the number of unpacked units.

The section on the right is where you pack items.

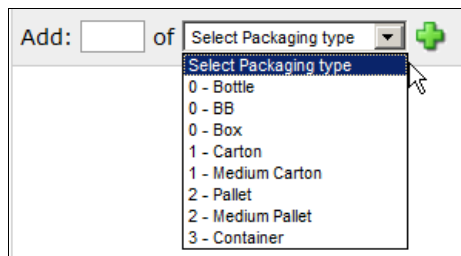
- 2 To see only specific items on the Item Details list, in the **Filter By** drop-down menu at top left, select the data element to filter by (for example, **Order** or **SupplierItemID**), then in the right drop-down menu either select a specific value or leave **Show All** selected. The list updates.

To see the full list again, click **Show All**.

- 3 To view information about an item, such as a description, click the **Details** link for that item. A dialog box displays. Click **Close** to close the box.



- 4 Select the packaging type.



- a In the **Add** field, type the number of packages to create.

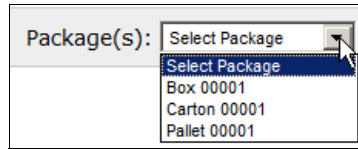
Note: If you plan to use the **Replicate** tool, described below, select **1**.

- b In the **Select Packaging Type** drop-down menu, select the package type — for example, **Carton**. Package types are grouped by packing level from lowest to highest — for example, 0, 1, 2, and 3.

Your trading community might allow you to use multiple package types in the same packing level — for example, cartons and medium cartons at one level, and pallets and medium pallets at a higher level.

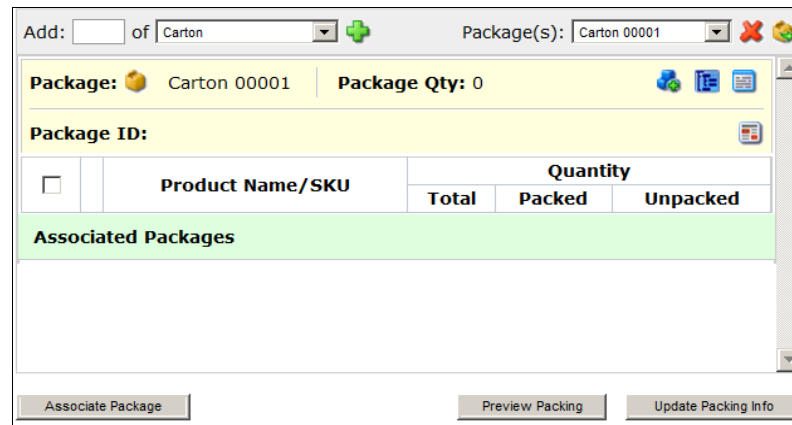
- 5 Click  **Add**.

The newly created packaging unit(s) display on the **Package(s)** list on the right. The list is ordered from the lowest to highest level of packaging.

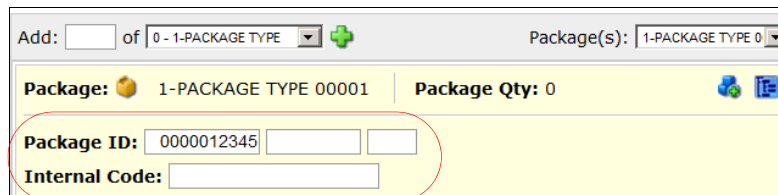


- 6 In the **Package(s)** list, click a packing unit.

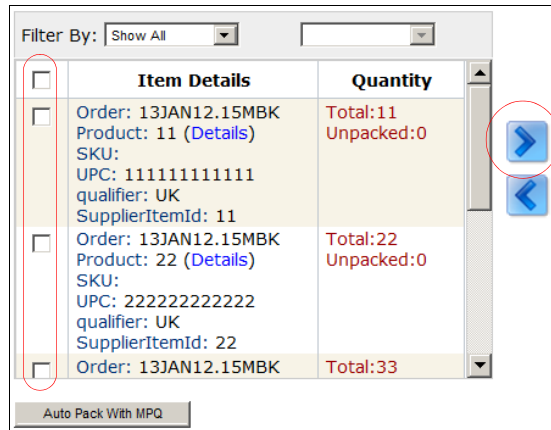
The packaging unit displays in the packing area at right. It includes no items yet.



- 7 If your community is set up for you to specify a **Package ID** or package **Internal Code**, add that information.



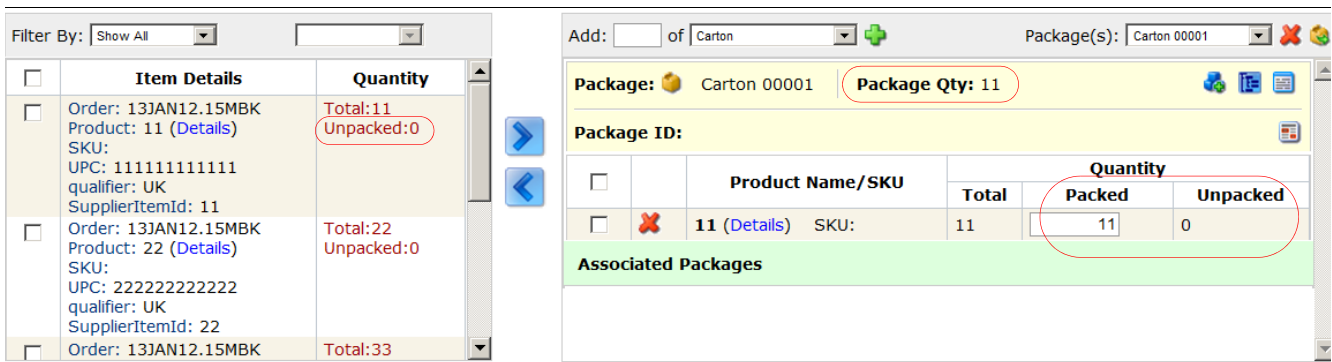
- On the left side of the page, select the check boxes for the line item(s) to pack in the packaging unit on the right. To select all items, select the check box in the header.



Note: Packing rules in your community might limit your options. For example, some trading communities have a maximum allowable quantity for each line item in a master pack — for example, the quantity in the PO. This might limit the number of items you pack in a master pack.

- Click the **Move Right** icon to add the item(s) to the packing area on the right. Line items display in order in the packing area.

At right, **Package Qty** displays the total quantity of items in the package, and the **Packed** column displays the quantity of units packed for each item in the package. **Unpacked** item quantities display on both sides.



- In the **Packed** field, change the number of units to pack in the selected packaging unit.

If unpacked units remain for the item, use the next step to create and automatically pack an additional packing unit(s) with the same number of units as the package you just packed.

- (Optional) To replicate the packing unit currently displayed in order to pack more packages,
 - Click **Replicate**.

If a message displays about missing user-defined attributes, return to the Packing Screen to populate the user-defined attribute fields and then click **Replicate** again, or continue without populating them. See also [“Add Mandatory Field Values” on page 248](#).

A dialog displays to select the replication method.



The dialog box titled "Replication Method" contains two radio button options. The first option, "Auto Replicate", is selected and includes the text "Automatically replicate items until all items are depleted." The second option, "Manual Replicate", is unselected and includes the text "Enter the number of packages for replication." Below the second option is a text input field labeled "No. of Packages:" with a value of 1 and the text "(Max allowed: 1)" to its right. At the bottom of the dialog are two buttons: "Continue" and "Close".

b Click one of the following options:

- **Auto Replicate** — The system packs all of the remaining units in as many packages as needed.
- **Manual Replicate** — In the **No. of Packages** field, specify a maximum number of additional packages to pack with the remaining items, such as 1 or 2. This might result in some units remaining unpacked.

c Click **Continue**. A message displays the result.

d In the message box, click **Close**

The Packing Screen page re-displays. For Auto Replicate, Unpacked quantities are 0.

12 Repeat these steps until all items are packed.


13 To send the ASN from the Packing Screen, click **Send**.

Important: This action succeeds only if all mandatory fields are populated for items and packages in the shipment. See:

- [“Add Mandatory Field Values” on page 248](#)
- [“Add Mandatory Values to One Package or Item” on page 251](#)

Unpack a Package

To unpack the contents of a package

- 1** In the upper right of the page, in the **Package(s)** drop-down menu, select the packing unit.
- 2** Click  **Unpack** next to the list.

Delete a Package


To delete a package

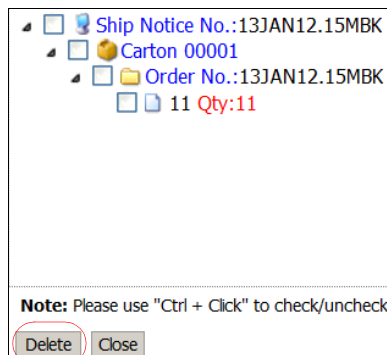
- 1** Select the packing unit from the **Package(s)** drop-down menu.

- 2 Click  **Delete** next to the list.

View/Edit Package Contents

To view and edit package contents

- 1 In the upper right of the page, in the **Package(s)** drop-down menu, select the packing unit.
- 2 Click  **Preview**. A dialog box displays.
- 3 To display contents, click the arrow icons next to the container. Items might be organized by Order number. For example:

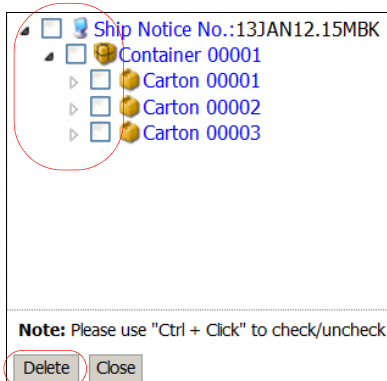


- 4 To delete an Order or specific items from the package, select those check boxes and click **Delete**.

View Hierarchy/Delete Multiple Packages

To view the packing hierarchy and delete multiple packages

- 1 Click **Preview Packing** below the table. A popup displays the hierarchy of packages in the shipment.



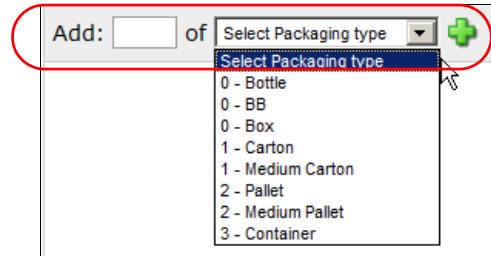
- 2 To delete packages, select their check boxes. To delete all packages, select the check box in the header.
- 3 Click **Delete**.


Pack Packages into Larger Units

To pack packing units (cartons, for example) into a larger packing unit (a pallet, for example), you create the larger packing units and *associate* the smaller packages to them.

To pack packing units

- 1 If you are not in the packing engine, at the top of the ASN form click **Pack**. The Packing Screen page opens.
- 2 On the right side of the page:

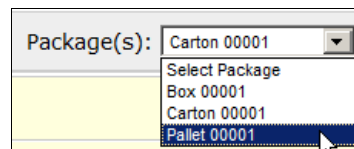
A screenshot of a web form. On the left, there is a text input field labeled 'Add:' followed by 'of'. To the right of 'of' is a dropdown menu labeled 'Select Packaging type'. A red circle highlights the 'Add:' field, the 'of' text, and the dropdown menu. A green plus icon is to the right of the dropdown. The dropdown menu is open, showing a list of options: '0 - Bottle', '0 - BB', '0 - Box', '1 - Carton', '1 - Medium Carton', '2 - Pallet', '2 - Medium Pallet', and '3 - Container'. The '2 - Pallet' option is highlighted with a mouse cursor.

- a In the **Add** field, type the number of large packages to create for the shipment.
 - b In the **Select Packaging Type** dropdown, select the package type — for example, **Pallet**. Available types vary by trading community.
- 3 Click  **Add**.

The newly created packaging unit(s) is added to the **Package(s)** list on the right.

- 4 In the **Package(s)** list, click the packing unit that you just created — for example, **Pallet 00001**.

For example:

A screenshot of a web form. On the left, there is a text input field labeled 'Package(s):'. To the right of 'Package(s):' is a dropdown menu. The dropdown menu is open, showing a list of options: 'Carton 00001', 'Select Package', 'Box 00001', 'Carton 00001', and 'Pallet 00001'. The 'Pallet 00001' option is highlighted with a mouse cursor.

The packaging unit displays in the packing area at right.

- 5 To pack the container packaging unit with smaller packages, click **Associate Package**.

The **Associate Package** dialog displays packages available to pack into the pallet or container. Your community might display item SKU, Product, and Quantity data.

If your community displays packages that contain one type of item, the Associate Package dialog has columns that display the SKU, Product identifier, and Quantity of the item in the package in that row.

For example:

<input type="checkbox"/>	Available Packages		
<input type="checkbox"/>	Carton 00001	SKU:	Product: 11 Qty: 11
<input type="checkbox"/>	Carton 00002	SKU:	Product: 22 Qty: 22
<input type="checkbox"/>	Carton 00003	SKU:	Product: 33 Qty: 33

« Previous 500 Displaying Records 1 to 3 of 3 Next 500 » View items per page

If your community displays packages that contain different types of items, to show SKU, Product identifier, and Quantity data for items in all packages, at the top left, click **Show All line items**. To show data only for specific packages, click **Show line items** in the package row.

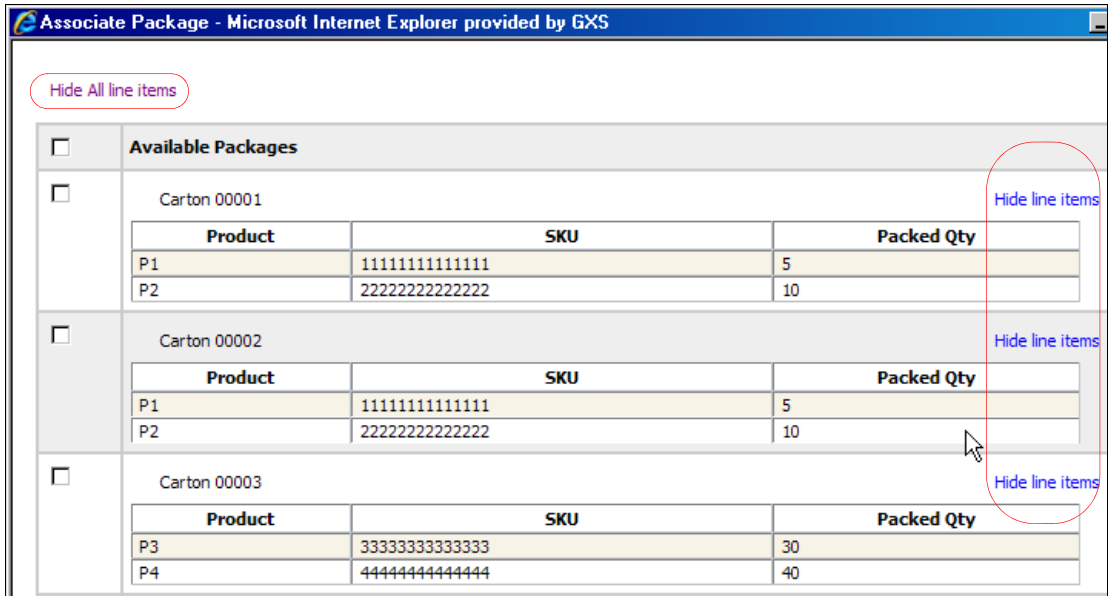
For example:

[Show All line items](#)

<input type="checkbox"/>	Available Packages		
<input type="checkbox"/>	Carton 00001		Show line items
<input type="checkbox"/>	Carton 00002		Show line items
<input type="checkbox"/>	Carton 00003		Show line items
<input type="checkbox"/>	Carton 00004		Show line items

« Previous 500 Displaying Records 1 to 4 of 4 Next 500 » View items per page

After clicking Show All line items, the dialog displays as below.

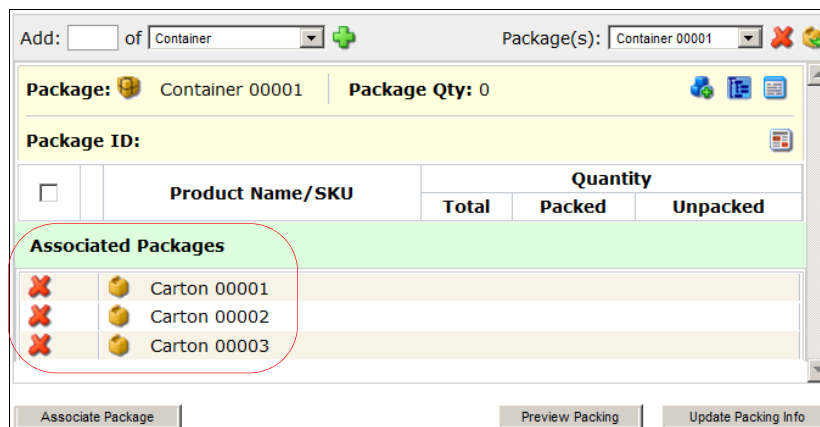


To hide item data, click **Hide All line items** or **Hide line items**.

6 Select packing units to associate (that is, to pack into the same larger packing unit):

- To select specific cartons (or containers) to associate, click those check boxes at left, then click **Associate**.
- To select all cartons (or containers), click the check box in the table header at top and click **Associate**.
- To select a consecutive series of cartons in the list, click the checkbox for the first and last carton (or container) in the series, then click **Select Range and Associate**. All packages, including and between the two that you selected — for example, cartons 14-20 — are automatically packed.

The Associate Package dialog closes. On the Packing Screen page, the packed cartons or containers display in the **Associated Packages** section.



7 Repeat these steps, as necessary.

Add Mandatory Field Values

After you pack, search multiple packages or items in a package to find mandatory user-defined fields that are missing values. You can add values to those fields and edit them later, if needed.

You can add user-defined mandatory field values to

- Multiple packages or items — see [“To add mandatory values to multiple packages or items” on page 248.](#)
- A single package or item — see [“Add Mandatory Values to One Package or Item” on page 251.](#)

To add mandatory values to multiple packages or items

Important: All mandatory user-defined fields must be populated.

1 Click **Enter Attributes**.

The User Defined Attributes dialog displays. By default, the **Packages** tab lists all packages of a preselected packaging type and one or more mandatory fields that are missing values.

Select Package(s) to define Attribute Values.

Packages Line Items

Package Type : Carton Status : Mandatory Values Missing

<input type="checkbox"/>	Status	Package Type	Package Name
<input type="checkbox"/>	Carton	Carton	Carton 00001
<input type="checkbox"/>	Carton	Carton	Carton 00002
<input type="checkbox"/>	Carton	Carton	Carton 00003
<input type="checkbox"/>	Carton	Carton	Carton 00004
<input type="checkbox"/>	Carton	Carton	Carton 00005
<input type="checkbox"/>	Carton	Carton	Carton 00006
<input type="checkbox"/>	Carton	Carton	Carton 00007
<input type="checkbox"/>	Carton	Carton	Carton 00008
<input type="checkbox"/>	Carton	Carton	Carton 00009
<input type="checkbox"/>	Carton	Carton	Carton 00010

Define Attribute Values Close

Do any of the following to change the view:

To do this	In this dropdown	Click
View items for a different packaging type.	Package Type	the applicable packaging type
List only packages in the selected type that have mandatory user-defined attribute fields that are complete.	Status	the applicable option
List all packages in the selected type, whether or not mandatory fields are populated.	Status	Show All

- 2 To fix missing user-defined attribute field values, click the check boxes for the items to fix. To select all packages, click the check box in the header.
- 3 To fix missing user-defined field values, click the check boxes for the packages to fix. To select all packages, click the check box in the header.

4 Click **Define Attribute Values**.

A dialog box displays.

- 5 Type the values for the missing mandatory user-defined fields and optional user-defined fields (if available).

If you selected more than one package, the dialog warns that any changes overwrite existing values because the packages have different values.

- 6 In the dialog, *enter* values in the fields.

To apply the value(s) to all packages of the selected type (for example, Carton), select the check box for **Apply these attributes to all packages of the type**

- 7 Click **Apply**. The system sets the specified values for the selected package(s) and displays a message.

- 8 Click **Back to Packages**.

The User Defined Attributes dialog shows the corrected packages. The **Status** drop-down menu has **Mandatory Values Completed** selected.

Select Package(s) to define Attribute Values.

Package Type :
Status :

	Status	Package Type	Package Name
<input type="checkbox"/>	✔	Carton	Carton 00001

To display corrected and uncorrected packages, in the **Status** dropdown click **Show All**.

- 9 To view or change the field value or option selection for a corrected package, select the package, then click **Define Attribute Values**.

Make changes as previously described.

- 10 Repeat these steps as needed to work with other package user-defined fields in the shipment.
- 11 To correct missing user-defined field values for items in the shipment, in the User Defined Attributes dialog, click the **Line Items** tab.

A new view displays all items in the first package of a preselected packaging type and one or more mandatory fields that are missing values.

Select Line Item(s) to define Attribute Values.

Package Type :
 Package Name :
 Status :

<input type="checkbox"/>	Status	Product Name/SKU	Total Qty	Packed Qty
<input type="checkbox"/>		ITEM1 (Details) SKU:11111111111111	10	10

Do any of the following to change the view:

To . . .	Do this . . .
View items for a different packaging type.	Select the applicable packaging type from the Package Type drop-down menu.
View items for a different package (such as a different carton).	Select the applicable package name from the Package Name drop-down menu.
List only items in the selected package with completed, mandatory user-defined fields.	Select the applicable option from the Status drop-down menu.
List all items in the selected packages regardless if the mandatory fields are populated.	Select Show All from the Status drop-down menu.

- 12 To fix missing user-defined field values, click the check boxes for the items to fix. To select all packages, click the check box in the header.
- 13 At bottom left, click **Define Attribute Values**. A dialog opens.
- 14 Specify the values for the missing mandatory and optional user-defined fields.

Mandatory Attributes

LI

Optional Attributes

Apply these values to all line items of selected package.

Apply these values to all selected line items across all packages.

- 15 In the dialog box, type the attribute values.

To apply the value(s) to all items, but only in the selected package (for example, Carton 00001), click the **Apply these values to all line items of selected package** check box.

To apply the value(s) only to the selected items but in all packages of the same packaging type, click the **Apply these values to all selected line items across all packages** check box.

- 16** Click **Apply**. The system sets the specified values for the selected item(s) and displays a message.

- 17** Click **Back to Line Items**.

The User Defined Attributes dialog shows the corrected items. The **Status** dropdown shows **Mandatory Values Completed** is selected.

Select Line Item(s) to define Attribute Values.

Packages Line Items

Package Type : Carton Package Name : Carton 00002 Status : Mandatory Values Completed

<input type="checkbox"/>	Status	Product Name/SKU	Total Qty
<input type="checkbox"/>	✓	ITEM2 (Details) SKU:22222222222222	20

To display corrected and uncorrected items, in **Status** click **Show All**.

- 18** To view or change the field value or option selection for a corrected item, select the item, then click **Define Attribute Values**.

Make changes as described above.

- 19** Repeat the above steps as needed to work with other item user-defined fields in the shipment.

Add Mandatory Values to One Package or Item


After you pack, use this procedure to add a missing value to a mandatory user-defined field for a specific package or item in the shipment.


For example, add package measurement information to communicate the dimensions of a carton or pallet. Active Orders uses this information to calculate package volume.

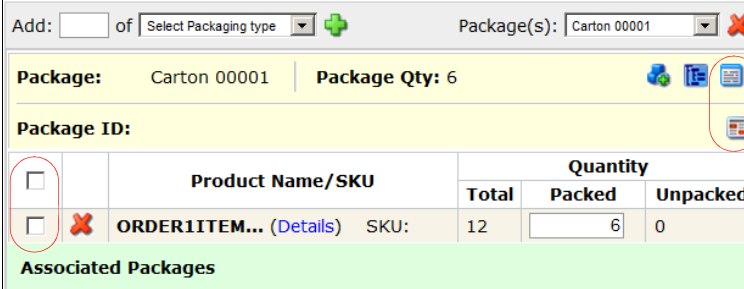
To search packages and items for missing user-defined fields values, see ["Add Mandatory Field Values" on page 248](#).


To add mandatory values to one package or item

Important: All mandatory user-defined fields must be populated.

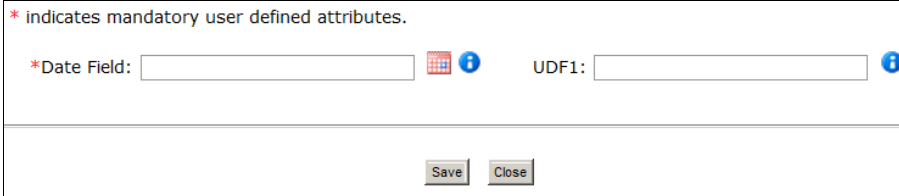
- In the packing engine, in the **Package(s)** drop-down menu, click the package that you want to work with or that contains the item — for example, **Carton 00001**.
- Do one of the following:
 - For package user-defined fields, click  **User-Defined Attributes for Package**.


- For item user-defined fields, select one or more line items in the package and click  **User-Defined Attributes for Pack List(s)**.



		Product Name/SKU	Quantity		
			Total	Packed	Unpacked
<input type="checkbox"/>		ORDER1ITEM... (Details) SKU:	12	6	0

A dialog displays mandatory user-defined fields for the package or item.



For a date field, either click the  calendar icon to select a month, day, and year, or type the date into the field. Your preferred Date format is in your company Profile.

Note: An administrator sets date validation rules.

- 3 Enter the information, then click **Save**. The system sets the specified values for the selected package or item(s) and displays a message.
- 4 To view or change the value later, reopen the dialog using these steps.

Assign Serial Numbers

Important: Make sure that you print the packing labels that you need before you do this.

To assign serial numbers

- 1 To automatically assign serial numbers for packing identification, on the right side of the page click **Update Packing Info**.
Important: After you click **Update Packing Info**, you cannot print labels and reports.
- 2 At the confirmation prompt, click **OK**. The system assigns the packing serial numbers.
- 3 To view the serial numbers, click **Preview Packing**.

Print Shipping Labels and Reports

To print the labels and reports

- 1 Click **Print Labels/Reports**.

The Label Reports page displays the programs to print shipping labels and reports for your community. The print programs available vary by community.

List of Labels		List of Reports	
SB Wa		STAR	PACKLIST
SBKRO			
SB CV			
SB MEI			
SBTarg			

Note: If the Ship Notice contains more than 500 packages or 750 line items, they system generates the report or labels asynchronously and emails you a PDF file.

- Click the program you want to generate the labels or report in PDF format. (For reports you might have the choice of PDF or CSV format.)

The system generates the labels or report in PDF (or CSV) format and displays them on a viewer page.

Ship From : 5 LINE ITEMS 5 LINE ITEMS 5 LINE ITEMS, SD 45745747	Ship To: 5 LINE ITEMS 5 LINE ITEMS 5 LINE ITEMS, DF 57457457
DSD PICK & PACK Department 23453 Order Number : 5 LINE ITEMS Invoice Number : 5 LINE ITEMS Pallet 00001	Store Number : 5 LINE Pallet
Serial Shipping Container Code (00) 1 0000004 000291577 0	

- Use the **Print** function to print the labels or report. You can also save a copy of the labels or report to your PC.

Save Your Packing Information and Send the Ship Notice

After all line item units are packed in packing units, and your packing structure matches your actual shipment, save the packing information and return to the Ship Notice form.

Important: Make sure that you printed the packing labels that you need before clicking **Update Packing Info** in the step 1 below, because after doing that, you cannot print labels and reports.

To save packing data and send the Ship Notice

- 1 Do one of the following:
 - To print labels later, not now, click **Save and Exit** on the Packing Screen page. Print labels later.
 - After printing the labels (see the [“Print Shipping Labels and Reports”](#) on [page 252](#) procedure), click **Update Packing Info** and confirm that your packing structure is accurate.
- 2 Click **Send**.
- 3 If your packing structure includes a Container, your community might require you to complete additional Container information:
 - a At the prompt, click **OK**.
 - b Click **Edit Container Properties**.
 - c In the container information page, complete the information for each container in the shipment.
 - d To send the Ship Notice, click **Send**. The system confirms that the document was successfully submitted.

Send Documents and Files

Attach a File to a Document

To attach a file to a document, your document forms must be configured to support this feature. Configuration occurs during forms setup.

You cannot attach a file to a document when you create it. You must first create the file, save it, and then access it from your Sendbox, where it must have a **Saved** status.

An attached file cannot exceed 5 MB.

To attach and send a file to a partner

- 1 Click the **Document Manager** tab, and on the left side of the page, click **Sendbox**.

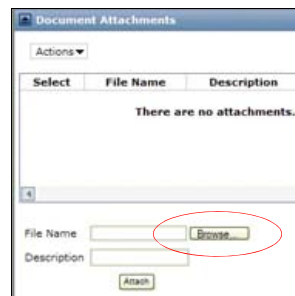
- In the **Document Sendbox** list, click the **Document ID** of the document you want to attach a file to.

Select	Document ID	Trading Partner	Document Type	Status	Modified Date/Time	Days Before System Deletion	Comment
<input type="checkbox"/>	ASN100	HC_IWF_DEMO_X12	SHIPMENT NOTICE	Saved	Thursday, April 04, 2013 14:37:38 GMT	41	
<input type="checkbox"/>	1234567890	HC_IWF_DEMO_X12	INVOICE	Sent	Tuesday, March 19, 2013 12:47:04 GMT	25	

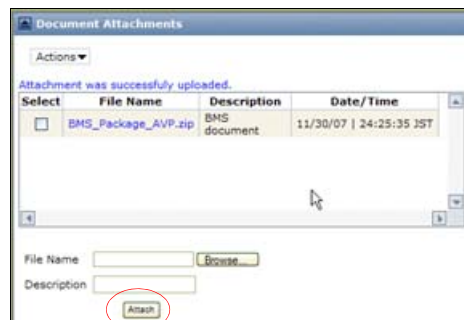
The Document View page displays your document contents.



- At the top of the document form, in the **Add Attachment(s)** section, click the **Attach** link.
- On the Document Attachments popup that opens:
 - Click **Browse** to locate the file on your desktop. Then, find and select the file and click **Open**.



- In the **Description** field, type a descriptive title for the attachment.
- Click **Attach**. Trading Grid uploads the attachment.



- Repeat the previous step for each file you want to attach.

- 6 When finished, close the Document Attachments popup, and at the top of the document form, click one of the following:
 - **Send** to immediately send the document to your Trading Partner. The document appears in your Sendbox with a status of **Sent**.
 - **Save** to save the form and add the document to your Sendbox, where you can later send it. The document has a status of **Saved**.

Modify and Resend Documents

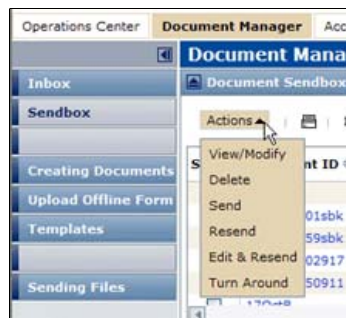
You can:

- Modify a document that has not yet been sent.
- Resend a document that has been sent without modifying it.
- Edit and resend a document that has been sent.

For files, see [“Send, Modify, and Resend Files” on page 257](#).

To modify or resend a document

- 1 Click the **Document Manager** tab, and on the left side of the page, click **Sendbox**.
- 2 In the **Document Sendbox** list, click the check box for the document to modify or resend.
- 3 To resend a document with a **Sent** status to the Trading Partner, at the top of the list, click **Actions** > **Resend**. Trading Grid immediately submits the document for sending. To view and/or modify a document with a **Saved** status, or to modify a document with a **Sent** status and then resend it, click **Actions** > **View/Modify** or click **Actions** > **Edit & Resend**, respectively.



Make your modifications.

- 4 Do one of the following:
 - To resend a document with a **Sent** status to the Trading Partner, click **Actions** > **Resend**. The document displays in your **Document Sendbox** with a **Resent** status.
 - To send the document for the first time, at the top of the form, click **Send**. The document displays in your **Document Sendbox** with a **Sent** status.
 - To save the form send or resend it later, at the top of the form, click **Save**. The document displays in your **Document Sendbox** with a **Saved** status.

Send, Modify, and Resend Files

To resend a file without updates

- 1 On a Document Manager page, on the left side of the page, click **Sendbox**.
- 2 In the **File Sendbox** listing, in the **Select** column, click the box(es) of the file(s) to resend.
- 3 At the top of the listing, click **Actions**, then click **Resend**.


To send a new file, or to modify and resend a file

- 1 Click the **Document Manager** tab.
- 2 To modify a file, but no longer have the applicable file on your desktop, you can download it from the Trading Grid. To do so,
 - a Click **Sendbox** in the left panel.
 - b In your **File Sendbox**, click the check box for the file.
 - c Click **Actions > Download**.
 - d Follow the prompts to save the file.
- 3 On your desktop, make any changes to the file and click **Save**.
- 4 In the left area of any Document Manager page, click **Sending Files**.
- 5 On the Sending Files page, next to the **Filename** field,
 - a Click **Browse** to locate the file on your desktop.
 - b Select the file, then click **Open** to specify the complete path and name of the file.

For example: D:\My Documents\Test Documents\Document123.xml

- 6 (Optional) To make sure the file that now appears in the **Filename** field is the correct file, click **View** to see the file contents.
- 7 If the file you are sending contains your Trading Partner's address information, click **Send**.
- 8 If the file does not contain your Trading Partner's address information, click the **Recipient data NOT embedded in file** option.
- 9 Provide the data into the new fields that display and then click **Send**. All fields are required.

Field Name	Description
Profile	Click Browse to open a list of Translation Profiles, then in the list select the profile for your Trading Partner. If you do not know, or cannot find, the applicable Profile, contact Global Support Services.
Sender's Reference	Type the Sender's Transmission Reference number. This is the Identifier for the file or the interchange control number.

Field Name	Description
Trading Relationship	Click Browse to open a list of Trading Partners. Select the name of the Trading Partner you are sending the file to.
Application Reference	<p>Application Reference — Type of data in the file. For example, for an EDI Invoice, enter 810.</p> <p>For non-EDI files (for example, CSV, XML, user-defined field), Trading Grid automatically appends *BIN to the Application Reference value that you enter. To disable this function, in the upper right area of the page click the  Configure icon, click the check box for Do Not Include *BIN for APRF, then click Apply. For example, the receiver might have a rule based on Application Reference, therefore it might expect a specific value (for example, INVOICE) and not *BIN added to that value.</p>

System Administrators

II

This section contains instructions for company system administrators performing administrative tasks, including how to create customer and company accounts, and set up mailboxes in Trading Grid Online.

- [Chapter 10, "Community Manager," on page 260](#)
- [Chapter 11, "Account Manager," on page 310](#)

As a Reseller or Community Administrator, you must first create accounts for customers and spoke companies then connect them to Trading Grid Online, using either a company hierarchy structure (parent/child) or a hub/spoke link.

For companies using a hierarchy structure, you must set up both a parent company and its child company(s).

For hub/spoke companies, such as a retail company (hub) that provides forms to their suppliers (spokes), the hub Community Administrator first sets up the hub company, then invites the spoke companies to connect (see [“Invitation Tool” on page 297](#)). When a spoke company registers, it specifies the association to the hub company, thus establishing the hub/spoke link.

This chapter explains how to use Community Manager to set up and connect companies in the system.

Topics include:

- [“Create company accounts” on page 261](#)
- [“Add Customer User Accounts” on page 263](#)
- [“Set Up Trading Relationships” on page 266](#)
- [“Mailboxes and EDI Addresses” on page 275](#)
- [“Define the Customer’s Service Contacts” on page 278](#)
- [“Define Customer Alerts and Options” on page 282](#)
- [“Enhanced Rules” on page 289](#)
- [“Resolve Customer Issues” on page 297](#)
- [“Invitation Tool” on page 297](#)
- [“On-Boarding and Self-Registration” on page 303](#)
- [“Pending Registrations” on page 308](#)

Create company accounts

Required Information

To set up a company account, you need the following information:

<ul style="list-style-type: none"> Company name 	<ul style="list-style-type: none"> Parent Company name (if customer is a child company)
<ul style="list-style-type: none"> Company address 	<ul style="list-style-type: none"> Company website address
<ul style="list-style-type: none"> Industry Type 	<ul style="list-style-type: none"> Primary SIC code
<ul style="list-style-type: none"> UCCEAN Number, required if Customer is using the Trading Grid ASN service 	<ul style="list-style-type: none"> DUNS number
<ul style="list-style-type: none"> Company number, if applicable 	<ul style="list-style-type: none"> Global Location number, if applicable
<ul style="list-style-type: none"> Business contact name, address, email, phone, FAX 	<ul style="list-style-type: none"> Technical contact name, address, email, phone, FAX, if different from Business contact

To create a company account

- 1 Click the **Community Manager** tab.
- 2 Click **Company Management**.

The Company List page opens.

The screenshot shows the 'Community Manager: Company Management' interface. On the left is a navigation menu with options like 'Company Management', 'Pending Registration', 'Invitation Tool', 'Finance Tool', 'Migration Criteria Setup', and 'Solution Provisioning'. The main area is titled 'Company List' and contains search filters for Company Name, Updated Date, Created Date, and Company Type. Below the filters is a table of companies with columns for Company Name, Date Created, and Last Updated. A legend at the bottom identifies various company types and statuses.

Company Name	Date Created	Last Updated
GE-GC00016931M1	Wednesday, August 08, 2046	Friday, July 24, 2015
TITLEIST CO.	Friday, October 19, 2040	Friday, May 08, 2015
YW52531/YZ14531, INC.	Thursday, March 06, 2036	Wednesday, September 20, 2006
USER 1081	Sunday, December 19, 2032	Thursday, May 08, 2014
AT REGRESSION, INC-GC00017192M1	Monday, April 30, 2018	Wednesday, September 20, 2006
werwerw	Wednesday, June 29, 2016	Tuesday, June 16, 2015
OMRON - OMG	Thursday, June 16, 2016	Thursday, June 16, 2016
CMS16JUN1633359	Thursday, June 16, 2016	Thursday, June 16, 2016
CMS16JUN1623442	Thursday, June 16, 2016	Thursday, June 16, 2016
OT	Thursday, June 16, 2016	Thursday, June 16, 2016


The list displays the companies already defined and set up in your community, up to 1,000 of the most recent companies that were set up in Community Manager. The page displays:


- Company Name.
- Date created.

- The person who set up the company.
- Date last updated.
- The person who updated the company information.

At the bottom of the list, the icons are explained, as follows.



If you are a Reseller, the  (Reseller) icon precedes your Company Name, for example the **Training and Docs** company.

- 3 Above the listing, on the right, from the **Create** drop-down list, select one of the following:
 - If you are a Reseller, select **Reseller's Customer**.
 - If you are setting up a Reseller select **Reseller**.
 - Otherwise, select **GXS Customer**.
- 4 Click **OK** (next to the **Create** drop-down list).
The Step 1: Identify Company page opens.
- 5 Enter the data for the company you are creating.
Note: If you previously created the parent company, and this was a child company, click the **Yes, identify parent company below** check box and search for, or enter, the name of the parent company.
- 6 Click **Next Step**.
The Step 2: Company Profile page opens.
- 7 Enter data about the company.
Important: If this is a parent company, for **Hierarchy Access**, select the **Allow to create child company(s)** check box.
- 8 Click **Next Step**.
The Step 3: Review page opens.
- 9 Check that the information you entered is accurate. To make any changes, click **Previous Step** and go back to the applicable step and make your changes. Then, click **Next Step** to return to this page.
- 10 Click **Create**.
- 11 On the confirmation page, click the **Return to the company list** link.
The new company, preceded by the  (Reseller's customer) icon, displays in the Company List.

Company Profile

The Company Profile is where you access the customer's information. Review the information from the previous step. To update customer information, make the updates on the Company Profile page.

To review the company profile

- 1 Click the **Community Manager** tab > **Company Management**. Find the applicable company and click its name.

The section expands.

2 Click **Company Profile**.

The Company Profile page opens.

3 Review the information and add any new information.

Company Profile Section	Description
Profile Status	This data is system-generated.
Organization Hierarchy	If the customer company has child companies, check the Allow to create child company(s) check box.
Company Information, Business Contact, Technical Contact	The company and contact names and addresses. One person can be multiple contacts. The contacts receive user invitations after the company subscribes to Trading Grid.

4 Do one of the following:

- Click **Actions** > **Save**.
- Click **Save**.

Your changes are saved.

Assign a Subscription Package

Many new TGO functions are regularly added. We recommend that you work with your GXS Representative to assign or modify subscription packages.

Add Customer User Accounts

Creating a Customer user via the User Management service immediately registers the user and bypasses the invitation process. After the user account is created, the user is ready to access and work within the Trading Grid.

Topics include:

- ["Add New User Accounts"](#)
- ["Activate, Deactivate, or Delete User Accounts" on page 266](#)

Add New User Accounts

To add a new user

- 1 Click the **Community Manager** tab.
- 2 Click the applicable Customer Company Name.
The Company Profile page opens.
- 3 Click **User Management**.
The User List page opens.
- 4 From the **Actions** drop-down list, select **Create New User**.
The Step 1: User Information page opens.
- 5 Enter all the information for the user.
- 6 Click **Next Step**.
The Step 2: Service Privileges page opens.
- 7 Under **Service Instance(s)**, select the service instance(s), (the subscription package(s) and the options (privileges)) for each service instance that you want the user to have. By default, all options are selected for any service instance that you select.
- 8 Under **Roles**, select the role of the new user. All roles have access to the user functions (Service Instances) that are subscribed to by the Company.

User Role	Administrative Functions
Company Administrator	All of the administrative functions of Trading Grid, subscribed to by all Companies in the community. These functions exist in both the Community Manager and Account Manager components.
Account Administrator	All of the administrative functions in Account Manager that are subscribed to by the Company. The functions include: <ul style="list-style-type: none"> ■ Maintenance of the Company Profile. ■ Inviting or setting up, and maintenance of, Company users (User Management). ■ Administration of the Trading Community and its distribution lists. ■ Subscription modification. ■ Service Configuration, which can include: <ul style="list-style-type: none"> ■ Setting up and maintaining mailbox information ■ Defining and setting company or mailbox rules and alerts ■ Mailslotting ■ Monitor Billing invoices. ■ Define or update the company Password Policy.
Service Configuration Administrator	The Service Configuration functions in Account Manager that are subscribed to by the Company.

User Role	Administrative Functions
Trading Community Administrator	The Trading Community functions in Account Manager that are subscribed to by the company. These can include: <ul style="list-style-type: none"> ■ Requesting and approving trading partnerships. ■ Defining and maintaining the AutoForwarding of messages (see "AutoForward Partnership" on page 271). ■ Setting up and maintaining the AutoCopy distribution lists (see "AutoCopy Partnership" on page 273).
Account User	None. This user does not have access to any of the administrative functions in the Account Manager.
Trading Partnership Approver	Only the Trading Community function of approving trading partner relationships (EDI to EDI) (see "Set Up Trading Relationships" on page 266).
AutoForward Administrator	Only the Trading Community function of setting up and maintaining AutoForward partnerships (see "AutoForward Partnership" on page 271).
AutoCopy Distribution List Administrator	Only the Trading Community function of defining and maintaining AutoCopy distribution lists (see "AutoCopy Partnership" on page 273).

9 Click **Next Step**.

The Step 3: Review page opens.

10 Carefully review the information, especially the Service Selection instances and options.

11 To make any changes, click **Previous Step** and go back to the applicable step and make your changes. Then, click **Next Step** to return to this page.

12 Do one of the following:

- Click **Submit** to enter the person into the Trading Grid.

Note: If you did not enter all the required data, the **Submit** button is disabled.

- To save the data you entered, but not yet activate this person in the Trading Grid, click **Save**. In the User list, the user status is Incomplete.

A confirmation page opens.

13 Click **User Management**.

The User List page displays the user you created.

The following information displays for each user:

- **User Name** — User's name. Click the name for information about the user.
- **User ID** — User's email address.
- **Status** — Status of the user:
 - **Active** — The user is approved to participate in the Trading Grid.
 - **Inactive** — The user is not currently participating in the Trading Grid.
 - **Incomplete** — The user has not yet been approved to participate in the Trading Grid.

Activate, Deactivate, or Delete User Accounts

The activate, deactivate, or delete actions can be performed for more than one user at a time; however, you must perform the same action for all selected users.

To activate, deactivate, or delete a user account

- 1 Select the user(s).
- 2 Do one of the following:
 - To authorize the user to access the Trading Grid, click **Actions > Activate**.
 - To temporarily prevent the user from using the Trading Grid, click **Actions > Deactivate**.
 - To permanently remove the user and all his or her data from the Trading Grid, click **Actions > Delete**.

A confirmation message displays.

- 3 Click **Yes**.

Set Up Trading Relationships

This section defines the Company's trading partnerships or relationships, that is, who and where they send documents to and receiving documents from.

There are several types of partnerships you can set up for the customer.

Topics include:

- ["Current Trading Partner List"](#)
- ["Standard Trading Partnership" on page 267](#)
- ["Open Trade Partnership" on page 270](#)
- ["AutoForward Partnership" on page 271](#)
- ["AutoCopy Partnership" on page 273](#)

Current Trading Partner List

To see a listing of the company's current Trading Partners

- 1 Click the **Community Manager** tab, then click the applicable customer **Company Name**.

The Company Profile page opens.

- 2 Click **Trading Community**.

The Community Manager: Trading Community page opens.

This page displays two listings. The **Trading Partners** list displays the current partnerships and the following information for each Trading Partnership.

Column Name	Description
Mailbox Number	The mailbox number(s) associated with this role and partnership.
Trading Partner	Identification of the Trading Partner.
Partner VAN	The network used in this partnership.

Column Name	Description
Partner EDI Address Your EDI Address	The EDI addresses of both the customer and its Trading Partner. Click the Trading Partner EDI Address to see information about the partnership.
Your Role	Whether the customer is a Sender of interchanges or a Receiver of interchanges. If the customer is both Sender and Receiver with this Trading Partner, two partnerships display for this Mailbox number and trading partner.
Partnership Type	Type of partnership, where <ul style="list-style-type: none"> ■ AutoCopy means that the customer can send one interchange to multiple receivers. ■ AutoForward means that Trading Grid automatically forwards interchanges that the customer receives to another EDI Address(es). ■ Normal refers to any standard Trading Partnership setup.
Status	Current partnership status, where <ul style="list-style-type: none"> ■ Approved means that the trading partnership is currently active. ■ Pending Partner Approval means that the Trading Partner has not yet responded to the trading partnership request.

The second listing, the **Open Tradings** list, displays the EDI addresses that have open trading.

Standard Trading Partnership

A *standard trading partnership* is set up so the customer can send (and receive) transactions with one specific trading partner. This partnership can then be further defined to:

- Automatically forward documents they receive from this partner to other users using a distribution list.
- Automatically send a copy of documents they send to this partner to other users using a distribution list.

Request a Standard Trading Partnership

Use this procedure to request a trading partnership.

- 1 Click the **Community Manager** tab, then click the applicable customer **Company Name**.
The Company Profile page that opens.
- 2 Click **Trading Community**.
The Trading Community Company List page opens.
- 3 Do any of the following that apply:
 - If your company has multiple mailboxes, select the applicable mailbox for the new partnership from the **Mailbox Number** list, or select **All**.
 - If this is your first partnership, click **Request New Partnership**.
 - If this is *not* your first partnership, click **Actions > Request New Partnership**.

The Step 1: Trading Partner Details page opens.

4 In the **Partnership Information** section, enter the following information:

Field	Description
Partner EDI Address	Do the following: If necessary, click Trade with Specific Partner . In Partner VAN , do one of the following: <ul style="list-style-type: none"> ■ Select GXS if the trading partner is on the GXS Trading Grid network. ■ Select Interconnect if the trading partner is on another VAN service. In Partner Address , enter the trading partner's EDI address.
Your EDI Address	Do one of the following: <ul style="list-style-type: none"> ■ Click Single. Type the customer's EDI address or click Browse and select the address. ■ Click Multiple. Click Browse and select the address.
Your Role	Click the Sender and/or Receiver check boxes based on the customer's role(s) in the trading partner relationship. If you select both Sender and Receiver , Trading Grid creates two partnerships for this Mailbox number and trading partner.
Your Alias	Type a name that represents the customer to the trading partner.

5 In the **Billing Information** section, select the billing option established by the customer and the trading partner.

6 Click **Next Step**.

7 Do one of the following:

- If you entered an **Interconnect EDI Partner Address** in step 4 which does *not* currently exist in the Trading Grid, a message displays. To add the EDI partner address, continue with the following three steps.

1 Click the **Add Partner Address** link.

The **Add Interconnect Partner EDI Address** page opens.

2 Provide the following information.

Field	Description
Partner EDI Address	Type trading partner's EDI address.
Interconnect Name	Use the Select drop-down list to select the Interconnect Name .
Company Name	Type trading partner's company name.
Contact First Name	Type trading partner's contact information.
Contact Last Name	Type trading partner's contact information.
Contact Phone Number	Type trading partner's contact phone number.

3 Click **Submit**.

The Step 2: Review page opens.

- If you entered an **Interconnect EDI Partner Address** in step 4 which *does* exist, the Step 2: Review page opens. Continue to step 8.
- 8 Do any of the following that apply:
 - Review the information.
 - To make any changes, click **Previous Step** to return to Step 1 page.
 - Make the changes, click **Next Step** to return to this page.
 - 9 Click **Submit**.
 The Trading Partnership Request Complete page opens.
 - 10 Click **Return to Trading Partnership List**.
 The Trading Partnerships list page opens. The new partnership displays in the list with a type of **Normal** and a status of **Pending Partner Approval**.

To approve or reject, view, modify, or terminate a Standard Partnership

You can only modify the billing information. To modify other partnership details, you must first delete the current partnership and then create a new partnership with the correct details.

- 1 On the Community Manager page, click **Company Management**, then click the applicable company name.
- 2 Click **Trading Community**.
- 3 In the **Trading Partnerships** listing, select the partnership to approve, reject, view, change, or terminate.
- 4 Do any of the following that apply:

Action	Do this
Approve Partnership	Click Actions > Approve Partnership . The partnership status changes to Approved . Note: Only a partnership with Pending Your Approval can be approved.
Reject Partnership	Click Actions > Reject Partnership . The partnership status changes to Rejected . Note: Only a partnership with Pending Your Approval can be rejected.
Terminate Partnership	Click Actions > Delete Partnership . The partnership is immediately removed from the listing.
View or Modify Partnership	Click Actions > View/Modify Partnership . The Trading Partnership Details page opens. Note: You can only modify the billing information. To modify other partnership details: <ol style="list-style-type: none"> 1 Delete the partnership. 2 Create a new partnership with the correct details.
Change Partnership Type	To change Partnership to AutoForward, see "AutoForward Partnership" on page 271 . To change Partnership to AutoCopy, see "AutoCopy Partnership" on page 273 .

- 5 Click **Save**.

Open Trade Partnership

An *open trade partnership* allows the customer to send (and receive) transactions with any trading partner within the Trading Grid. Trading documents and/or files with other "open" traders does not require a formal partnership setup. An *Open Trade Partnership*:

- Allows the customer to exchange documents with any trading partner that requests to trade with them at that EDI address.
- Enforces a 50-50 split billing process, which means the customer pays for all the transactions that it sends, and the receiver's company pays for the transactions that your customer receives and for the storage of that mailbox.

To request an open trade partnership

1 Click the **Community Manager** tab, then click the applicable Customer Company Name.

2 Click **User Management**.

The Trading Community Company List page opens.

3 In the **Open Tradings** section, do any of the following:

- If your company has multiple mailboxes, select the applicable mailbox for the new partnership, from the **Mailbox Number** list, or select **All**.
- If this is your first partnership, click **Request New Partnership**.
- If this is *not* your first partnership, Otherwise, click **Actions** > **Request New Partnership**.

The Step 1: Open Trading Details page opens.

4 In the **Partnership Information** section, enter:

- **Your EDI Address** — Type your EDI address or click **Browse** and select it.
- **Your Role** — If you expect to send and receive interchanges, click the **Receiver** check box.

5 Click **Next Step**.

The Step 2: Review page opens.

6 Do the following:

- Review the information.
- To make any changes, click **Previous Step** to return to Step 1 page.
- Make the changes, click **Next Step** to return to this page.

7 Click **Submit**.

Make the changes and then click **Next Step** to return to this page.

8 Click **Submit**.

The Open Trading Request Complete page opens.

9 Click **Return to Trading Partnership List**.

The Trading Partnerships page opens displaying the new partnership in the **Open Tradings** listing.

For each open Trading, the listing displays:

- **Your EDI Address** — Click the EDI Address to see information about the partnership.
- **Your Role** — Displays your role in the partnership; **Sender** of interchanges or a **Sender** and **Receiver** of interchanges.

To view, modify, or delete an open trade partnership

- 1 On the Community Manager page, **Company Management**.
- 2 Find the applicable company and click the name.
- 3 In the section that expands, click **Trading Community**.
- 4 In the **Open Tradings** listing, select the partnership to view, change, or terminate.
- 5 Do any of the following that apply:

Action	Do this
Delete Open Trading (partnership)	Select the partnership, click Actions > Delete Open Trading . The partnership is removed from the listing.
View/Modify Open Trading	<ol style="list-style-type: none"> 1 Select the partnership, click Actions > View/Modify Open Trading. 2 View the partnership information. Note: Only the billing information can be modified. To modify other partnership details, the partnership must be deleted then recreated with the correct details. 3 Make changes to the billing information.

- 6 Click **Save**.

AutoForward Partnership

Important: In the “[Account Manager](#)” section, please read the “[AutoForward Partnership](#)” and “[AutoForward Implications](#)” topics for complete information.

Set up an AutoForward Partnership

Important: Before setting up an AutoForward partnership, Trading Partnerships must exist and be approved between:

- The address that sends the interchanges and the address that receives the interchanges.
- The address that receives the interchanges and the address to which you want to forward the interchanges.

To set up AutoForwarding

- 1 On the Community Manager page, click **Company Management**.
- 2 Find the applicable company and click the name.
- 3 In the section that expands, click **Trading Community > AutoForward Partnership**.

4 Click **Actions > Create AutoForward Partnership**.

Note: If no listing displays, click **Create AutoForward Partnership** again. The **Create AutoForward Partnership** page opens.

5 In the **AutoForward EDI Address** section, enter the following:

Sender EDI Address	Address from where the interchanges are sent.
Your EDI Address	Customer EDI address that receives the interchanges that you want to forward.
AutoForward EDI Address	EDI address to which the interchanges (that are sent from the Sender EDI Address to Your EDI Address) should be autoforwarded.

Note: Use **Search** to search and select specific addresses. Click **Search by Company** to display a pop-up to enter a partial or complete name, then click **Search**. To view a listing of all companies, click **Search** without entering any search criteria. Then click the company name, and if applicable, select an address.

6 To forward only specific document types, in the **Document Type** section, select the appropriate **Envelope Type**.

The page refreshes displaying all associated document types in the **Available Document Types** area.

7 Do one of the following:

- To select one document type, select the type then click **Add**.
- To select multiple document types:
 - 1 Press **Ctrl** and select the types.
 - 2 Release **Ctrl**, and click **Add**.
- To select all document types, click **Add All**.

The selection displays in **Selected Document Type** area.

8 To remove document types:

- Select the type(s) and click **Remove**.
- To remove all types, click **Remove All**.

9 Click **Actions > Submit**.

A confirmation message displays. The AutoForward Partnership is created.

10 Use the AutoForward Partnerships page to view this new partnership.

To view, modify, or terminate an AutoForward Partnership

- 1 In the Community Manager page, click **Company Management**.
- 2 Find the applicable company, and click the name.
- 3 In the section that expands, click **Trading Community > AutoForward Partnership**.

The AutoForward Partnership listing opens.

4 Do any of the following that apply:

Action	Do this
Delete Partnership	<ol style="list-style-type: none"> 1 Select the partnership, click Actions > Delete. The confirmation message displays. 2 Click Yes. The partnership is immediately removed from the listing.
View/Modify Partnership	<p>Only Document Types can be modified. To modify an EDI address, you must delete the current partnership, then create a new partnership with the correct EDI address.</p> <p>To add a document type to be forwarded:</p> <ol style="list-style-type: none"> 1 Select partnership, click Actions > View/Modify. 2 Locate Available Document Type area and do one of the following: <ul style="list-style-type: none"> ■ Select one document type then click Add. ■ Select multiple document types by clicking Ctrl and selecting document types. Release Ctrl and click Add. ■ Select all document types by clicking Add All. Your selection displays in the Selected Document Type area. <p>To stop a document type from being forwarded:</p> <ol style="list-style-type: none"> 1 Select partnership, click Actions > View/Modify. 2 Locate the Selected Document Type area and do one of the following: <ul style="list-style-type: none"> ■ Select one document type then click Remove. ■ Select multiple document types by clicking Ctrl and selecting document types. Release Ctrl and click Remove. ■ Select all document types by clicking Remove All.

5 Click **Actions > Submit**.

AutoCopy Partnership

Important: In the “Account Manager” section, please read the “AutoCopy Partnership”, “AutoCopy Implications”, and “Use AutoCopy with AutoForward” topics for complete information.

An AutoCopy Distribution List

To create an AutoCopy distribution list

- 1 On the Community Manager page, click **Company Management**.
- 2 Find the applicable company and click the name.
- 3 In the section that expands, click **Trading Community > AutoCopy Distribution List**.
- 4 Click **Actions > Create Distribution List**.

Note: If no listing is displayed, click **Create Distribution List**.

The Create Distribution List page opens.

5 Enter the following information.

Field	Description
Mailbox Number	Type the number of the Mailbox that receives the interchanges.
Distribution List Address	Type the EDI address that receives the interchanges Trading Grid copies and sends.
Member EDI Addresses	Type the EDI addresses to which Trading Grid should send the copied interchanges. To add more than 10 addresses, scroll to the bottom of the page, then click Add .
Primary Billing Address	Select Primary Billing Address if this EDI address is the primary billing address. Otherwise, leave this item un-selected.

6 Click **Actions > Submit**.

A confirmation message displays. The AutoCopy Distribution List is created.

7 Use the AutoCopy Distribution List page to view this new partnership.

To view, modify, or delete an AutoCopy Distribution List

1 On the Community Manager page, click **Company Management**.

2 Find the applicable company and click the name.

3 In the section that expands, click **Trading Community > AutoCopy Distribution List**.

The Autocopy Distribution List page opens displaying all the listing information including:

- **Mailbox Number** — Mailbox that receives the interchanges.
- **Distribution List Address** — EDI address that receives the interchanges that the Trading Grid copies and sends.

4 Do any of the following that apply:

Action	Do this
Delete	<ol style="list-style-type: none"> 1 Select the distribution list, click Actions > Delete. 2 Confirm the deletion. The distribution list is removed from the listing.
View/Modify	<ol style="list-style-type: none"> 1 Select the distribution list, click Actions > View/Modify. 2 View the distribution list information. Note: Only the Member EDI Address information can be modified. To modify other distribution list information, the distribution list must be deleted then recreated with the correct details. 3 Make the changes to the list. <ul style="list-style-type: none"> ■ To modify a Member EDI Address, delete it, and then add the correct one. ■ To delete a Member EDI Address, select it, then click Actions > Delete. The address is removed from the list. ■ To add a new Member EDI Address, type the address in Add Member EDI Address, then click Add. ■ To specify whether an address is the primary billing address, select or deselect the Primary Billing Address option.

5 Click **Save**.

Mailboxes and EDI Addresses

This section describes how to configure an EDI mailbox. The procedures describe how to:

- Update the EDI mailbox information.
- Add other EDI addresses to mailboxes.
- Specify data retention.
- Select reports to receive.

Topics include:

- ["Configure EDI Mailboxes"](#)
- ["Add or Delete Mailbox Addresses" on page 276](#)

Configure EDI Mailboxes

To configure an EDI mailbox

- 1 Click the **Community Manager** tab, and click the applicable customer **Company Name**.
The Company Profile page opens.
- 2 Click **Service Configuration**.

The Mailbox and EDI Address Maintenance page opens displaying a list of EDI Mailboxes that are associated to this customer account.

3 To set or change the mailbox options, select the applicable mailbox.

4 Click **Actions > Update Mailbox**.

The Mailbox Information page opens.

5 Specify the following information.

Field	Description
Mailbox Number	Displays the number for the mailbox. This value cannot be changed.
Mailbox Alias	Do one of the following: <ul style="list-style-type: none"> ■ To add an alias for the mailbox, type the value. ■ To change the value displayed, delete the existing value and enter another value.
Current Mailbox Password	Do one of the following: <ul style="list-style-type: none"> ■ To add a password for the mailbox, type the value. ■ To change the value displayed, delete the existing value and enter another value. Enter the current password for the mailbox.
New Mailbox Password	To define a new password for the mailbox, type the password.
Confirm New Password	To confirm the password, type the password again.
Trading Partner Transaction Report	To subscribe to this report, which summarizes the transactions and interchanges (both sent and received) between you and each of your trading partners in the previous month. For each trading partner, the report lists each transaction, its description, and its number of KCs.
Send Meta Data Retention Period	Number of days to retain meta information on data sent from your mailbox / EDI address.
Transaction Retention Period	Select the number of days, up to a maximum of 45 days, for each transaction interchange to remain in your mailbox. Before selecting this option, refer to your contract or discuss this with your OpenText sales representative, as this option might have billing implications.

6 Click **Save**.

7 Perform these steps for each mailbox associated with the customer account.

Add or Delete Mailbox Addresses

Important: You can only add or delete EDI addresses. To modify an EDI address, you must first delete (see [“To delete an EDI address from a mailbox”](#)) the incorrect address and then add the correct address, as specified below.

To add an EDI address to a mailbox

1 Click the **Community Manager** tab, and click the applicable customer **Company Name**.

The Company Profile page opens.

2 Click **Service Configuration**.

The Mailbox and EDI Address Maintenance page opens displaying a list of EDI Mailboxes that are associated to this customer account.

3 In the **Number of EDI Addresses** column, click the number for the applicable mailbox.

The EDI Address List page opens.

4 Scroll down to the **Add New EDI Address** area and enter the information.

5 Click **Add**.

A confirmation message displays.

6 Click the **Return to EDI address list** link.

The EDI address is added.

7 Repeat steps **3** through **5** to add additional addresses to the mailbox.

To delete an EDI address from a mailbox

1 Click the **Community Manager** tab, and click the applicable customer **Company Name**.

The Company Profile page opens.

2 Click **Service Configuration**.

The Mailbox and EDI Address Maintenance page opens.

3 In the **Number of EDI Addresses** column, click the number for the applicable mailbox.

Note: The EDI Address List page opens.

Important: You cannot delete an EDI address if there are trading partnerships currently associated with the address. You must check for and terminate any associated Partnerships before deleting the EDI address. See [“Terminate Associated Partnerships” on page 277](#).

4 Locate the applicable EDI address, and click the **view partnership** link in the **Associated Partnerships?** column.

5 Select the address to delete.

6 Click **Actions > Delete EDI Address**.

A confirmation message displays.

7 Click **Yes**.

The EDI address is deleted.

Terminate Associated Partnerships

Before deleting an EDI address, you must first verify whether any associated partnerships exist that reference the EDI address. If partnerships do reference the address, then the partnerships must be terminated so the EDI address can be deleted.

To verify and terminate associated partnerships

1 On the Community Manager tab, click the applicable customer **Company Name**.

- The Company Profile page opens.
- 2 Click **Service Configuration**.
 The Mailbox and EDI Address Maintenance page opens displaying a list of EDI Mailboxes that are associated to this customer account.
 - 3 Click **Mailbox and EDI Address**.
 The Mailbox and EDI Address Maintenance page opens.
 - 4 In the **Number of EDI Addresses** column, click the number for the applicable mailbox.
 The EDI Address List page opens displaying the EDI addresses and associated partnerships for the selected Mailbox number.
 - 5 Locate the EDI address that needs to be deleted.
 - 6 Do one of the following:
 - If no link displays in the **Associated Partnerships?** column, there is no associated partnership. This EDI address can be deleted. Continue to ["Add or Delete Mailbox Addresses" on page 276](#).
 - If the **View partnership** link displays in the **Associated Partnerships?** column, click the link.
 Identify the partnership(s) that need to be terminated, then return to the **Mailbox and EDI Address Maintenance** page. Continue to step 7.
 - 7 Click **Trading Community**.
 The EDI Address list page opens.
 - 8 Terminate the partnership(s).
 - 9 Continue to ["Add or Delete Mailbox Addresses" on page 276](#).

Define the Customer's Service Contacts

Service Contacts is a centralized area where you define who is to:

- Receive specific email notifications at the company level.
- Be the default contact for service messages and outages.
- Be notified as a result of the rules and alerts you later define for the mailbox(es).

Important: For TGMS customers: All contacts to be notified as a result of rules and alerts defined in **Event Management** must be set up using Service Contacts.

Topics include:

- ["Define Service Contacts" on page 279](#)
- ["Re-Assign a Default Contact" on page 280](#)
- ["Remove a Default Contact" on page 280](#)
- ["View, Change, or Delete a Contact" on page 281](#)

Define Service Contacts

To define service contacts

- 1 Click the **Community Manager** tab, and click a Customer Company Name.
The Company Profile page opens.
 - 2 Click **Service Configuration**.
The Service Configuration page opens.
 - 3 Click **Service Contacts**.
The Service Contacts page opens. It lists any contacts that have been defined. For each contact, the listing shows:
 - First and last name.
 - A list of alerts the person is contacted about (**Contact Type** column).
 - If the person is a **Default** contact. Trading Grid automatically designates the Technical Contact entered in the Company Profile as the default contact. You can change the default contact (see ["Re-Assign a Default Contact" on page 280](#)).
 - If the person is currently active (**In-Use** column).
 - 4 Click **Actions**, and click **Add New Contact**.
The Create New Contact Service page opens.
 - 5 Enter the required information.
 - 6 Optionally select the **Contact Type(s)**, or which contacts should receive notification(s) for in addition to service messages and outages.
- Note:** Based on the service subscription, you might not see all the options listed. If in doubt, check with your OpenText sales representative.

- For **IWF Users**:

Invitation	Contact receives subsequent invitations, such as invites for the company to connect to an additional IWF hub sponsoring new forms.
Incoming Document Alert	"Whenever a new document arrives in your Document Inbox" rule.
Incoming File Alert	"Whenever a new file arrives in your File Inbox" rule.

■ For **TGMS Users**:

Arrival Alerts	"Whenever a document interchange arrives in your mailbox" rule.
FA Delinquency	"Whenever a trading partner has a delinquent FA" rule.
Inactivity Alert	"Whenever a mailbox is inactive" rule.
Mailbox Error Alert	"Whenever a mailbox processing error occurs on an outbound interchange" rule.

Note: When you select an option for a customer contact, Trading Grid automatically adds the contact to the notification list for alerts you create later. For example, if you subscribe to and select **Arrival Alert** for this contact, and define a rule to generate an alert when a partner has one or more documents that need acknowledgment, Trading Grid automatically notifies this contact. If you later delete the contact, Trading Grid automatically deletes the contact from the **Arrival notification list**.

- 7 Enter the **Email Address** for the contact. If the address is for a pager, select **This is a Pager address**.
- 8 Click **Submit**.
The Service Contact Request Complete page opens.
- 9 Click the **Return to Service Contacts List** link.
The new contact displays in the list on the Service Contact page.

Re-Assign a Default Contact

Important: You must designate one default contact who receives notifications for service messages and outages. Initially, Trading Grid assigns the Technical Contact from your Company Profile as the default contact.

To re-assign the default contact

- 1 Click the **Community Manager** tab, and click a Customer Company Name.
The Company Profile page opens.
- 2 Click **Service Configuration**.
The Service Configuration page opens.
- 3 Click **Service Contacts**.
The Service Contacts page opens.
- 4 Select the contact you want to make the default contact, click **Actions**, and click **Set as Default Contact**.
Trading Grid reassigns the "default contact" from the previous person to the one you specified.

Remove a Default Contact

Important: Only one contact can be the default contact.

To remove a default contact

- To delete a contact that has the default role, first assign a new default contact, and delete the previous default contact.

View, Change, or Delete a Contact

To view, change, or modify a contact

- 1 Click the **Community Manager** tab, and click a Customer Company Name.
The Company Profile page opens.
- 2 Click **Service Configuration**.
The Service Configuration page opens.
- 3 Click **Service Contacts**.
The Service Contacts page opens.
- 4 Select the contact you want to view, modify, or delete.
Important: To delete a default contact, you must first assign a new default contact; see ["To re-assign the default contact."](#)

5 Perform the appropriate action:

To . . .	Do this
Delete the contact	<ul style="list-style-type: none"> ■ Click Actions, and click Delete.
View or modify the contact	<ol style="list-style-type: none"> 1 Click Actions, and click View/Modify. The Modify New Service Contact page opens. 2 Change the contact's information. 3 (Optional) Change the Contact Type(s), or which contacts should receive notification(s) in addition to service messages and outages. 4 Based on your service subscription, you might or might not see all the following options: <ul style="list-style-type: none"> ■ Arrival — "Whenever a document interchange arrives in your mailbox" rule. ■ FA Delinquency — "Whenever a Trading Partner has a delinquent FA" rule. ■ Incoming Document — "Whenever a new document arrives in your Document Inbox" rule. ■ Incoming File — "Whenever a new file arrives in your File Inbox" rule. ■ Mailbox Inactivity — "Whenever a mailbox is inactive" rule. ■ Mailbox Outbound Error — "Whenever a mailbox processing error occurs on an outbound interchange" rule. <p>Note: When you select an option for the contact, Trading Grid automatically adds the contact to the notification list for that alert in Event Management. For example, if you previously subscribed to and select the FA Delinquency for this contact, and in Event Management you define a rule to generate an alert when a partner has one or more documents that need acknowledgment, Trading Grid automatically notifies this contact. If you later delete the contact, Trading Grid automatically deletes the contact from the FA Delinquency notification list.</p>

Define Customer Alerts and Options

This section describes the Event Management function and provides instructions for setting up customer alerts and business calendar options.

Topics include:

- ["Alerts and Options Overview" on page 283](#)
- ["Define the Alerts" on page 283](#)
- ["Mail Slots" on page 288](#)
- ["Password Policy" on page 289](#)

Alerts and Options Overview

Use the Trading Grid **Event Management** feature to define the rules and policies to determine when trading partners are compliant or non-compliant, based on these rules and policies. The compliancy or non-compliancy of trading partners is reported in the **Reports** component under **Functional Acknowledgement Management** and **Transaction Alerts**.

Note: The functions described in this chapter apply only when customers have the optional alert services. These services might require an additional fee. Contact your OpenText sales representative to verify which trading partners have these services.

Set up each customer mailbox with one or more of the following services:

- **Business Calendar option** — The days the customer wants the service to consider as working or business days for each of your EDI mailboxes.
- **Arrival Alert** — When a document is placed in the mailbox, the Trading Grid sends the customer a message. An alert is requested for specific document types, specific trading partners, or both. In addition, the alert is routed to different individuals within the customer company based on document type, trading partner, or both. This is particularly useful for a user that checks their mailbox infrequently but wants to respond to orders from key clients as soon as possible.
- **Mailbox Outbound Error Alert** — If the customer sends a document to the Trading Grid Messaging Service and it fails processing, the Trading Grid alerts the customer. Therefore they are notified of the problem immediately.
- **Mailbox Inactivity Alert** — If the customer does not receive documents in their mailbox according to the schedule defined, Trading Grid alerts the customer, allowing them to check and determine whether or not a problem exists.
- **Mail Slots option** — Mail slots separate documents received according to business process needs.
- **Password Policy** — you can impose a more restrictive password policy than what the customer has defined.

Important: In order for these alerts to function properly, **all** alerts the customer subscribed to must be configured.

Define the Alerts

Important: For the alerts to function properly, you must configure all the alerts to which your customer subscribes.

To define customer alerts

- 1 Click the **Community Manager** tab, then click the applicable Customer Company Name.
The Company Profile page opens.
- 2 Click **Service Configuration > Event Management**.
The Transaction Event and Rules and Alerts page opens.

Topics include:

- “Business Calendar”
- “Inactivity Alert” on page 284
- “Arrival Alert” on page 285
- “Mailbox Error Alert” on page 287

Business Calendar

Note: The Business Calendar applies only to the Inactivity Alert.

To define the Business Calendar

- 1 Access the Transaction Event and Rules and Alerts page. See [“Alerts and Options Overview” on page 283](#).

The Transaction Event and Rules and Alerts page.

- 2 In the **Mailbox Specific Alerts** section, from the **Rule type** drop-down list, select **Business Calendar**.

- 3 From the **Mailbox** drop-down list, select the mailbox to which the calendar should apply, then click **Configure**.

The Business Calendar page opens.

- 4 In the **Working Days and Time Zone** section, enter the following.

- **Working Days** — Select the days the service should consider as working or business days. Inactivity alerts process Working Days only.
- **Time Zone** — Select the applicable time zone for your community.
- **Daylight saving time observed** — Select this option if your community observes daylight-savings time.

- 5 In the **Holidays (Optional)** section, enter the following:

- **Holidays** — Select the days the Trading Grid should ignore. These days do not have to be standard holidays; you can specify any day. The Holidays you specify are considered Non-Working Days. Click the calendar icon to select each holiday date.

- 6 Click **Save**.

- 7 Repeat these steps for each of your mailboxes.

Inactivity Alert

To create an inactivity alert

- 1 Access the Transaction Event and Rules and Alerts page. See [“Define the Alerts” on page 283](#).

The Transaction Event and Rules and Alerts page opens.

- 2 In the **Mailbox Specific Alerts** section, enter the following information.

- a From the **Rule type** drop-down list, select **Inactivity Alert**.
- b From the **Mailbox** drop-down list, select the mailbox to which this rule should apply, then click **Configure**.

The Mailbox Inactivity Alert page opens.

3 Enter the following information that applies.

Field	Description
Enable the Event Rule	Select this check box to turn on the rule.
Apply the Business Calendar	Select this check box to have mailbox inactivity measured only during working hours on working day, excluding holidays, as defined in the “Business Calendar” on page 284 . Otherwise, mailbox inactivity is measured 7 days a week.
The Range for Receiving Alerts	
Start Time	Enter the start time for receiving alerts.
Stop Time	Enter the stop time for receiving alerts.
Time Zone	Displays the time zone previously defined.
Mailbox Inactivity Alert Details	
Inactivity Length	Enter the number of hours the mailbox is inactive before Trading Grid generates a notification.
Notify Contact	<p>These are the customer’s contacts previously defined in the Service Contacts list. See “Define the Customer’s Service Contacts” on page 278.</p> <p>Do any of the following:</p> <ul style="list-style-type: none"> ■ To have the default contact receive the alert, click the Default Contact check box. To display the contact information, click the Default Contact link. ■ To have the contacts, previously designated as contact for this alert, receive the alert, click the Mailbox Inactivity Contact(s) check box. To display the contact information, click the Mailbox Inactivity Contact(s) link. ■ To have someone else receive the alert, click the Other Contacts check box then click Modify List. A list of all your service contacts displays. Select a contact from the list, then click Submit. ■ If a contact does not display in the list, you must define that contact. See “Define the Customer’s Service Contacts” on page 278. <p>To remove a contact from the Other Contacts list:</p> <ol style="list-style-type: none"> 1 Click the Other Contacts check box > Modify List. The list of service contacts displays. 2 Deselect the contact from the list, and then click Submit.

4 Click **Save**.

5 Repeat these steps for each of your mailboxes.

Arrival Alert

Use this procedure to create an arrival alert.

To create an arrival alert

1 Locate the Transaction Event and Rules and Alerts page. see [“Define the Alerts” on page 283](#).

The Transaction Event and Rules and Alerts page opens.

- 2 In the **Mailbox Specific Alerts** section, enter the following information.
 - a From the **Rule type** drop-down list, select **Arrival Alerts**.
 - b From the **Mailbox** drop-down list, select the mailbox to which this rule should apply, then click **Configure**.
- 3 On the page that opens, do one of the following:
 - Click **Add Arrival Alert**
 - Click **Actions > Add Rule**.

The Add Arrival Alert page opens.
- 4 Enter the following information.

Field	Describe
Document Type	Select a Document Type for the rule. <ol style="list-style-type: none"> 1 Click Browse. 2 Find the document type, then click the Select check box. The selected value displays in Document Type field.
Partner EDI Address	Enter the partner's EDI address. <ol style="list-style-type: none"> 1 Click Search by Company. 2 Do one of the following: <ul style="list-style-type: none"> ■ Type a partial or complete name in the pop-up then click Search. ■ Leave the field blank then click Search to view a listing of all companies. 3 Click Select. 4 Select the company name and an address. The selected value displays in Partner EDI Address field.

Field	Describe
Your EDI Address	<p>Enter your EDI address.</p> <ol style="list-style-type: none"> 1 Click Browse. 2 Find the address this rule to, then click the Select check box. 3 Click Select. <p>The selected value displays in Your EDI Address field.</p>
Notify Contact	<p>These are the customer's contacts previously defined in the Service Contacts list. See "Define the Customer's Service Contacts" on page 278.</p> <p>Do any of the following:</p> <ul style="list-style-type: none"> ■ To have the default contact receive the alert, click the Default Contact check box. To display the contact information, click the Default Contact link. ■ To have the contacts, previously designated as contact for this alert, receive the alert, click the Arrival Alerts Contact(s) check box. To display the contact information, click the Arrival Alerts Contact(s) link. ■ To have someone else receive the alert, click the Other Contacts check box then click Modify List. A list of all your service contacts displays. Select a contact from the list, then click Submit. ■ If a contact does not display in the list, you must define that contact. See "Define the Customer's Service Contacts" on page 278. <p>To remove a contact from the Other Contacts list:</p> <ol style="list-style-type: none"> 1 Click the Other Contacts check box > Modify List. The list of service contacts displays. 2 Deselect the contact from the list, and then click Submit.

- 5 Click **Submit**.
- 6 Repeat these steps for each of your mailboxes.

Mailbox Error Alert

To create a mailbox error alert

- 1 Locate the Transaction Event and Rules and Alerts page. see ["Define the Alerts" on page 283](#).
The Transaction Event and Rules and Alerts page opens.
- 2 In the **Mailbox Specific Alerts** section, enter the following information.
 - a From the **Rule type** drop-down list, select **Error Alert**.
 - b From the **Mailbox** drop-down list, select the mailbox to which this rule should apply, then click **Configure**.
The Mailbox Outbound Error Alert page opens.
- 3 Select the **Enable this Event Rule** option if it is not already selected.

4 In the **Mailbox Outbound Error Alert Details** section, enter the following.

Field	Description
Notify Contact	<p>These are the customer's contacts previously defined in the Service Contacts list. See "Define the Customer's Service Contacts" on page 278.</p> <p>Do any of the following:</p> <ul style="list-style-type: none"> ■ To have the default contact receive the alert, click the Default Contact check box. To display the contact information, click the Default Contact link. ■ To have the contacts, previously designated as contact for this alert, receive the alert, click the Mailbox Outbound Error Contact(s) check box. To display the contact information, click the Mailbox Outbound Error Contact(s) link. ■ To have someone else receive the alert, click the Other Contacts check box then click Modify List. A list of all your service contacts displays. Select a contact from the list, then click Submit. ■ If a contact does not display in the list, you must define that contact. See "Define the Customer's Service Contacts" on page 278. <p>To remove a contact from the Other Contacts list:</p> <ol style="list-style-type: none"> 1 Click the Other Contacts check box > Modify List. The list of service contacts displays. 2 Deselect the contact from the list, and then click Submit.

5 Click **Submit**.

6 Repeat these steps for each of your mailboxes.

Mail Slots

Mail slots separate documents you receive according to business process needs. You can set up slots to receive documents in categories; for example, by trading partner, document type, etc.



- Mail Slot 1 is for Invoices from all standard Suppliers, because these invoices get standard handling.
- Mail Slot 2 is for Invoices from DSD Suppliers, because these invoices get priority handling.
- Mail Slot 3 is for Invoices from Suppliers A and B, because these invoices are paid via EFT.

To set up the mail slots for your company

1 On the Trading Grid page, click the **Account Manager** tab > **Service Configuration** > **Mailslots** > **Create Mailslot**.

The Create Mailslot page opens.

2 Enter the following information.

Field	Description
Mailslot Name	Enter a descriptive name for the mailslot.
Description	Enter a description for the mailslot.
Mailbox	Use the drop-down list to select a mailbox number.
Rule Definition	
My EDI Address	Click  Search icon to find and select the applicable value.
Document Type	<ol style="list-style-type: none"> 1 Click  Search icon to find and select the applicable value. 2 Click Submit.
Partner EDI Address(es),	<ol style="list-style-type: none"> 1 Enter the address for the first trading partner, then click Add. The address displays. 2 Repeat this step for each applicable trading partner.
Associate Users	
Use this section to select Company employees that handle the documents in this mailslot.	
User	<ol style="list-style-type: none"> 1 Use the drop-down list to select the first user, then click Add. The employee's name displays. 2 Repeat this step for each applicable employee.

3 Click **Submit**.

Password Policy

The Password Policy page displays the current policy for this company, regarding user passwords. You can define a more restrictive password policy.

Note: When you change the password policy, your changes override only the fields where your policy is more restrictive than what the customer specified. Any change in password policy forces all users at this company to change their password at their next login attempt.

To change the password policy

- 1 On the Community Manager page, click **Company Management > Policy**.
The Password Policy page opens.
- 2 Modify the value(s) in any of the fields.
- 3 Click **Save**.

Enhanced Rules

The Trading Grid **Event Management** feature is where rules and policies are defined to determine when trading partners are compliant or non-compliant. Compliancy or non-compliancy is reported in the **Reports** component under **Functional Acknowledgement Management** and **Transaction Alerts**.

These steps apply only with these optional alert services (extra fee might apply). Contact a OpenText sales representative for more information.

Topics include:

- [“Rules and Alerts Descriptions” on page 290](#)
- [“Define the Alerts” on page 283](#)

Rules and Alerts Descriptions

For each customer mailbox, one or more of the following rules or alerts are used:

- **Enhanced Calendar Rule** — Alerts configured to be sent on the days when the service is considered “working” or “business” days for each EDI mailbox.
- **Enhanced Arrival Alert** — Alerts customers as soon as a document are placed in the mailbox. Alerts configured:
 - For specific document types or specific trading partners or both.
 - To route the alert to different individuals within the customer company based on document type or trading partner or both.

Note: Alerts like this assists the user to respond to orders from key clients as soon as possible.

- **Enhanced Error Alert** — Alerts customers when a document fails to be processed.

Note: Alerts like this assists the user to respond to errors immediately.

- **Enhanced FA Alert** — Alerts customer when acknowledgements are not received for documents sent according to a defined schedule.

Note: Alerts like this assists the user to verify receipt of documents sent and to circumvent problems with their orders as soon as possible.

Important: For these alerts to function properly, **all** subscribed alerts must be configured.

Define the Enhanced Rules

Important: In order for the rules to function properly, configure **all** subscribed rules. Based upon the subscription, configure all or some of these alerts.

Topics include:

- [“Accessing Transaction Event Rules and Alerts” on page 290](#)
- [“Business Calendar” on page 284](#)
- [“Inactivity Alert” on page 284](#)
- [“Arrival Alert” on page 293](#)
- [“Error Alert” on page 294](#)
- [“Functional Acknowledgment \(FA\) Alert Rule” on page 295](#)

Accessing Transaction Event Rules and Alerts

To define customer rules

- 1 In **Community Manager**, select the applicable Customer Company Name and click **Service Configuration > Event Management**.

The Transaction Event Rules and Alerts page opens.

- 2 Continue with any of the following:
 - “Business Calendar” on page 284
 - “Inactivity Alert” on page 284
 - “Arrival Alert” on page 293
 - “Error Alert” on page 294
 - “Functional Acknowledgment (FA) Alert Rule” on page 295

Business Calendar

To define the Business Calendar

- 1 From the Transaction Event and Rules and Alerts page (see “Define the Alerts”), under **Enhanced Alerts**, click **Select Rule Type**.
- 2 Click **Calendar Rule > Configure**.
- 3 Select the **Mailbox** and click **Configure > Create**.
The Enhanced Calendar Rule page opens.
- 4 Enter the data.

Section or Field	Description
Rule Name	Enter a descriptive name for this rule.
Enable Rule	Check this box to use this rule immediately.
My Details	If all company mailboxes and address apply to this rule, do nothing, else: <ul style="list-style-type: none"> ■ From the Mailbox dropdown, select the company mailbox for this rule. ■ From the My Address dropdown, select the address that for this rule. If all addresses apply, do not select anything.
Partner Details	If all Trading Partners apply, do nothing, else: <ul style="list-style-type: none"> ■ For the My Partner mailbox, click Search and search for the applicable Trading Partner company. Click Select. ■ From the Partner Address dropdown, select the address for this rule. If all addresses apply, do not select anything.
Working Days and Timezone	For: <ul style="list-style-type: none"> ■ Working Days. Select the days to consider the service as “working” or “business” days. ■ Time Zone. Select the applicable time zone for the community. ■ Daylight saving time observed. Select this option if the community observes daylight-savings time.
Holidays	Enter the dates the system should ignore. These are considered non-Working Days and do not have to be standard holidays. Click the adjacent Calendar icon to select the date of each non-working day.

- 5 Click **Save**.
- 6 Repeat these steps for each of the mailboxes.

Inactivity Alert

To create an enhanced inactivity alert

- 1 From the Transaction Event and Rules and Alerts page (see [“Define the Alerts”](#)), under **Enhanced Alerts**, click **Select Rule Type**.
- 2 Click **Inactivity Rule > Configure**.
- 3 Select the appropriate **Mailbox** and click **Configure**.
The Inactivity Alert Rule page opens.
- 4 On the Inactivity Alert Rule page, provide the following information:

Field	Description
Rule Name	Enter a descriptive name for the new rule.
Enable Rule	Select this option to use this rule immediately.
File/Document	Select the applicable option.
My Details	
Mailbox	If all company mailboxes and address apply to this rule, do nothing. Otherwise, from the Mailbox dropdown, select the company mailbox for this rule.
Address	Select the address that for this rule. If all addresses apply, do not select anything.
Partner Details	
My Partner	If all Trading Partners apply, do nothing. Otherwise, click the Search icon and select the applicable Trading Partner company. Then, click Select .
Partner Address	Select the address for this rule. If all addresses apply, do not select anything.
Rule Details	
APRF/Document Type	If all documents apply for this rule, do nothing. Otherwise, click Browse and locate the document type and click its Select box. Then, click Select .
Direction	Select the direction(s) of the file(s) or document(s). The default is Inbound .
Apply Business Calendar	select this option to measure mailbox inactivity only during working hours on working days, and not on holidays, as defined in the “Business Calendar” . Otherwise, inactivity is measured 24 hours, 7 days a week.
Start Time	Enter the Start Time for receiving alerts.
Stop Time	Enter the Stop Time for receiving alerts.
Time Zone	Supplied by system.
Event Occurrence	For the length of inactivity, enter the number of days and/or hours the mailbox should be inactive before generating a notification; that is, if a trading partner's mailbox is inactive for more than the number of hours specified, Trading Grid generates a notification.
Notification Options	These are the contacts previously defined in the Service Contacts list. Select the applicable contacts.

- 5 Click **Submit**.

Arrival Alert

To create an enhanced arrival alert

- 1 From the Transaction Event and Rules and Alerts page (see “Define the Alerts”), under **Enhanced Alerts**, click **Select Rule Type**.
- 2 Select **Arrival Rule** and click **Configure**.

The Enhanced Arrival Alert Rule page opens.

The screenshot shows the 'Enhanced Arrival Alert Rule' configuration page. On the left is a navigation menu with categories like 'Company Management', 'Billing', and 'Migration Criteria Setup'. The main content area contains the following fields and sections:

- Rule Name:** A text input field.
- Enable Rule:** A checked checkbox.
- File/Document:** Radio buttons for 'File' (selected) and 'Document'.
- Rule Conditions:** A section containing:
 - My Details:** Radio buttons for 'Mailbox' and 'My Address', each with a 'Select' dropdown.
 - Partner Details:** A 'My Partner' search field and a 'Partner Address' dropdown.
 - Rule Details:** An 'APRF/Document Type' search field, a 'Direction' dropdown (set to 'Inbound'), 'Event Occurrence' radio buttons ('Every time encountered' selected), and 'Notification Options' checkboxes for 'My Contacts', 'Partner Contacts', and 'Support Users'.
- Buttons:** 'Save', 'Delete', and 'Cancel' at the bottom.

- 3 Provide the following information:

Field	Description
Rule Name	Enter a descriptive name for the new rule.
Enable Rule	Use this option to enable this rule immediately.
File/Document	Select the applicable option.
My Details	
Mailbox	If all company mailboxes and address apply to this rule, do nothing. Otherwise, from the Mailbox dropdown, select the company mailbox for this rule.
Address	Select the address for this rule. If all addresses apply, do not select anything.
Partner Details	
My Partner	If all Trading Partners apply, do nothing. Otherwise, click the Search icon and select the applicable Trading Partner company. Click Select .

Field	Description
Partner Address	Select the address for this rule. If all addresses apply, do not select anything.
Rule Details	
APRF/Document Type	If all documents apply for this rule, do nothing. Otherwise, click Browse , find the document type and click its Select box. Click Select .
Direction	Select the direction(s) of the file(s) or document(s). The default is Inbound .
Start Time	Enter the Start Time for receiving alerts.
Stop Time	Enter the Stop Time for receiving alerts.
Time Zone	Supplied by system.
Event Occurrence	Select the applicable option.
Notification Options	These are the contacts previously defined in the Service Contacts list. Select the applicable contacts.

- 4 Click **Submit**.

Error Alert

To create an enhanced error alert

- 1 From the Transaction Event and Rules and Alerts page (see ["Define the Alerts"](#)), under **Enhanced Alerts**, click **Select Rule Type**.
- 2 Select **Error Rule** and click **Configure**.
The Enhanced Error Alert Rule page opens.
- 3 Do the following:

Field	Description
Rule Name	Enter a descriptive name for the new rule.
Enable Rule	Check this option to enable this rule immediately.
My Details	
Mailbox	If all company mailboxes and address apply to this rule, do nothing. Otherwise, from the Mailbox dropdown, select the company mailbox for this rule.
Address	Select the address for this rule. If all addresses apply, do not select anything.
Partner Details	
My Partner	If all Trading Partners apply, do nothing. Otherwise, click the Search icon. In the page that appears, find and select the applicable Trading Partner company. Click Select .
Partner Address	Select the address for this rule. If all addresses apply, do not select anything.
Rule Details	

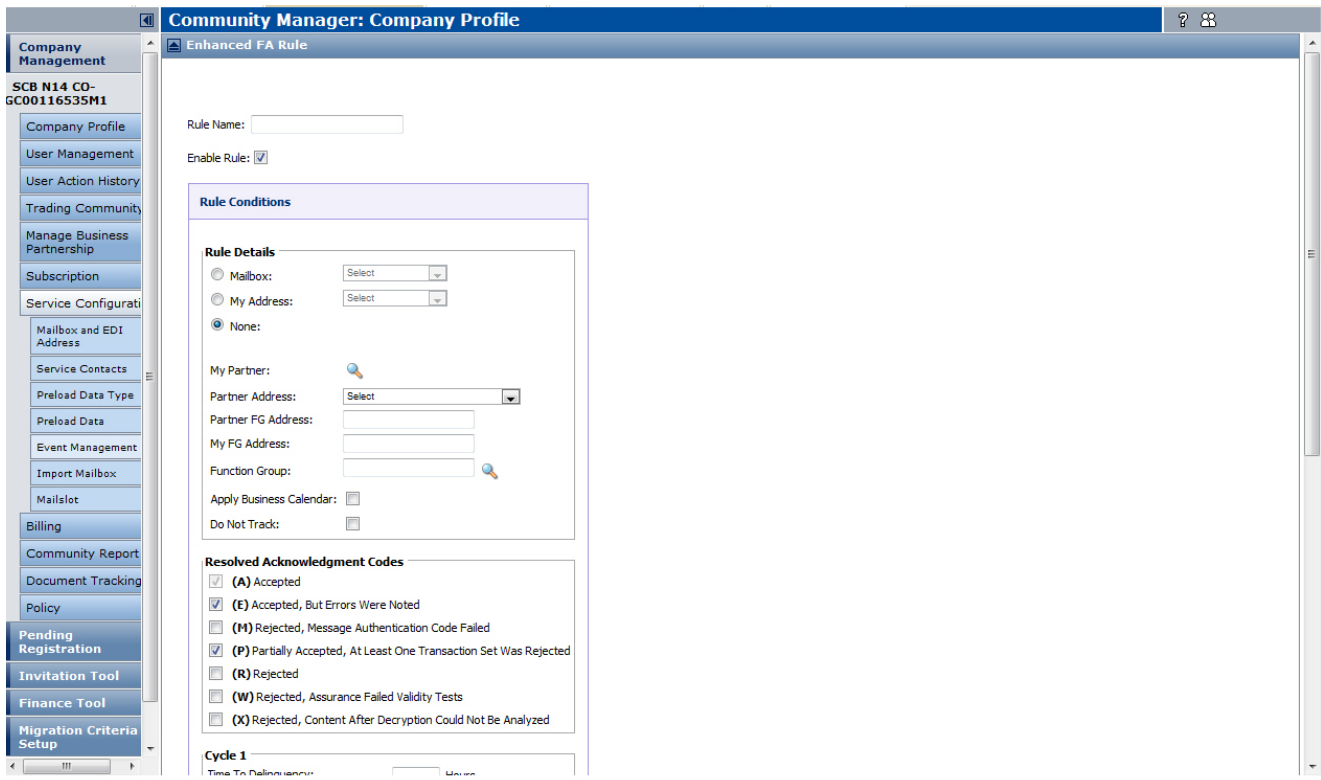
Field	Description
APRF/Document Type	If all documents apply for this rule, do nothing. Otherwise, click Browse and find the document type and click its Select box. Click Select
Direction	Select the direction(s) of the file(s) or document(s). The default is Inbound .
Error Severity	Enter the Start Time for receiving alerts.
Change Error Status	Enter the Stop Time for receiving alerts.
Notification Options	These are the contacts previously defined in the Service Contacts list. Select the applicable contacts.

4 Click **Submit**.

Functional Acknowledgment (FA) Alert Rule

To create an enhanced functional acknowledgment alert rule

- 1 From the Transaction Event and Rules and Alerts page (see ["Define the Alerts"](#)), under **Enhanced Alerts**, click **Select Rule Type**.
- 2 Select **FA Rule** and click **Configure**.
The Enhanced FA Alert Rule page opens.



3 Do the following:

Field	Description
Rule Name	Enter a descriptive name for the new rule.
Enable Rule	Check this option to enable this rule immediately.
Rule Details	
Mailbox	If all company mailboxes and address apply to this rule, do nothing. Otherwise, from the Mailbox dropdown, select the company mailbox for this rule.
Address	Select the address for this rule. If all addresses apply, do not select anything.
My Partner	If all Trading Partners apply, do nothing. Otherwise, click the Search icon and select the applicable Trading Partner company. Click Select .
Partner Address	Select the address for this rule. If all addresses apply, do not select anything.
Partner FG Address	Enter the address of the selected trading partner's applicable Functional Group. If all addresses apply, do not select anything.
My FG Address	Enter the address of the applicable Functional Group. If all addresses apply, do not select anything.
Function Group	Click the adjacent Search icon to select the applicable document type. If all types apply, do not select anything.
Apply Business Calendar	Select this option to measure mailbox inactivity only during working hours on working days, and not on holidays, as defined in the " Business Calendar ". Otherwise, inactivity is measured 24 hours, 7 days a week.
Do Not Track	Select this option to NOT track the Trading Partner(s) and Functional Group(s) for the options selected below.
Resolved Acknowledgment Codes	Select how to track documents.
Cycle 1	
Time to Delinquency	Enter the expected amount of time for a response after the document or file was received.
Notification Options	These are the contacts previously defined in the Service Contacts list. Select the applicable contacts.
Cycle 2	
Time Since Cycle 1	Enter the expected amount of time for a response after the first alert was received.
Notification Options	These are the contacts previously defined in the Service Contacts list. Select the applicable contacts.
Cycle 3	
Time Since Cycle 2	Enter the expected amount of time for a response after the second alert was received.
Notification Options	These are the contacts previously defined in the Service Contacts list. Select the applicable contacts.

4 Click **Save**.

Resolve Customer Issues

When signed on as a customer user, you see exactly what the user sees in Trading Grid. This is useful when helping customers solve problems or determining what is causing an error.

Topics include

- [“Log in as a Customer”](#) and then send a test file and examine the customer reports for errors or problems.
- [“Upload and Send a File”](#) on page 22 as a test.
- Examine the [“TGMS Reports”](#) for errors or problems.

Log in as a Customer

Use this procedure to login as a customer user.

To log in as a customer

- 1 In Community Manager, click **Company Management** and locate the applicable company.
- 2 Click the company name to expand the available options and select **User Management**.

The User Management page opens.

- 3 Click **Actions > Sign in as this User**.

The Trading Grid system for that user displays.

From this page you can

- Navigate and browse to find the information.
- Return to your own Trading Grid system. Click **End Act on Behalf**.



Next steps

- Send a test file using Transaction Manager — see [“Upload and Send a File”](#) on page 22.
- Go to the Reports component and examine the Trading Grid Messaging Service (TGMS) customer reports for errors or problems — see [“TGMS Reports.”](#)

Invitation Tool

Use the Invitation Tool to create and send reusable invitations that invite a customer company or customer user to register for Trading Grid.

Important: If you do not set up the user in Trading Grid, you must send them an invitation to register on Trading Grid.

On the Invitation Tool page, the

- **Company Invitations** list shows the invitations created on behalf of an IWF-subscribed company (the “hub”) to the customers receiving their forms (the “spokes”).
- **User Invitations** list shows the invitations created for users at customer companies.

For each invitation, the listings show

- **Invitation Name** — Name given to that invitation when it was created.
- **Invitation Type**
 - **Generic** — A generic invitation is a reusable invitation for sending to one or more recipients. Each recipient has the same Invitation Code.
 - **Unique** — A unique invitation is a one-time invitation that you send to one or more recipients. Each recipient has a unique Invitation Code, enabling easy tracking of each recipient's response.
- **Status** of the invitation. Statuses are
 - **Saved** — The invitation has not yet been sent.
 - **Active** — Invitees can now register using this Invitation Code.
 - **Expired** — The Invitation Code within the invitation has expired.
 - **Terminated** — The invitation is inactive. That is, nobody can register with this Invitation Code.
- **Expiration Date** — Date that the Invitation Code in the invitation expires.
- **Creator** — Name of the person who created the invitation.

Topics include

- [“Create a Company Invitation” on page 298](#)
- [“Copy a Company Invitation” on page 300](#)
- [“Create a User Invitation” on page 301](#)
- [“Modify a Company or User Invitation Details” on page 302](#)

Create a Company Invitation

Create and send reusable invitations to the “spoke” companies associated with a “hub” company that was previously set up.

There are various ways to connect companies to Trading Grid.

- For “parent/child” companies, set up both a “parent” company and its “child” company(ies) via the [“Create company accounts” on page 261](#) procedure.
- For “hub/spoke” companies, i.e., an IWF-subscribed company (the “hub”) providing forms to their user companies (the “spokes”):
 - Set up the “hub” company via the [“Create company accounts.”](#) procedure.
 - Invite the “spoke” companies via this [“Create a Company Invitation”](#) procedure. Then, when the “spoke” company registers, it specifies the association to the “hub” company, thus establishing the “hub/spoke” link.

Create a company invitation

- 1 In Community Manager page, click **Invitation Tool**.
The Invitation tool page opens.
- 2 Above the **Company Invitations** list, do any of the following:
 - For Resellers: click **Actions > Invite Reseller's Customer**.
 - For first invitations to a company: click **Invite Reseller's Customer**.
 - Click the applicable action.
- 3 On the Step 1: Invitation Details page, enter all the information.

Field	Description
Inviting Company	From the Reseller's or the Community Administrator's Customer list, select the IWF-subscribed company (the "hub") that this company is associated with.
Invitation Name	Enter a unique, descriptive name for the invitation.
Invitation Type	Select either <ul style="list-style-type: none"> ■ Unique if this is an invitation that you are sending one time. A unique Invitation Code is assigned to each recipient company. ■ Generic if this is an invitation that you send to different companies. The Invitation Code is the same for all recipient companies.
Approval Type	After an invitee (prospective company who receives the invitation) receives this invitation and registers on the Trading Grid, the invitee must be approved before the user can access the Trading Grid. Select either <ul style="list-style-type: none"> ■ Manual if you want the Approver to individually approve or reject each invitee that registers. We strongly recommend this option for all Generic invitations because the invitation code in a generic invitation is not specific to any one recipient, and could be distributed to unintended registrants. ■ Automatic if you want Trading Grid to automatically approve each invitee for you. GXS recommends that you select this option for any invitation sent to a single company, because the recipient company can begin using the service as soon as they respond to the invitation.
Registration Status Notification	Enter the email address(es) of the people who want or need to be kept up-to-date of the company's registration status, e.g., if it registered, if the registration was approved.
Expiration Date	The final date that the Trading Grid accepts the company's registration; this is the date that the Invitation Code supplied in this invitation expires.
Notes	Enter up to 4,000 characters of explanatory information that is for your use only — the invitee does not see this information. The Trading Grid truncates anything over 4,000 characters; click the Count Characters box below this field to ensure you stay within the 4,000 limit .

- 4 Click **Next Step**.

- 5 On the Step 2: Services page, select the service(s) and the options. For example: privileges for each package that you want the company to have.
Note: By default, all options are selected for any service.
- 6 Click **Next Step**.
- 7 On the Step 3: Recipient Details page,
 - **Enter Email Address(es)** — Address(es) of the company(ies). Separate multiple addresses by a semi-colon (;), comma (,), or a blank space.
 - Optionally upload an image (for example: a company logo) to appear in the invitation.
 - **Enter the Email Language** — Select the language of the invitation text.
 - **Enter the Email Content** — Invitation text.Click **Edit from Template** and change the text (in the new page) if necessary. Then click **Submit**.
Note: Note that you can enter the recipient details now, or you can continue and save the invitation and enter these details later. You cannot send the invitation without the recipient details.
- 8 Click **Next Step**.
- 9 On the Step 4: Review page.

Review the information, especially the Service Selection packages and privileges. To make changes, click **Previous Step** to go back to the applicable step and make changes. Then, click **Next Step** to return to this page.
- 10 Do one of the following.
 - To save the invitation information without sending it, click **Finish**.

The invitation displays in your **Company Invitations** list with a **Saved** status. You can send the invitation at a later time.
 - To both send and save the invitation, click **Send Now**.

Do this only if you completed the Recipient Details in Step 7 above. The invitation displays in your **Company Invitations** list with an **Active** status.

Copy a Company Invitation

To copy an existing company invitation

- 1 In Community Manager, click **Invitation Tool**.

The **Company Invitation List** page opens.
- 2 Find and select the applicable invitation to copy, then click **Actions > Copy Invitation**.

The Copy Invitation page opens.
- 3 Enter a new **Invitation Name**, enter the recipients, and make any other changes, as applicable.
- 4 Click **Save**.

The invitation displays in the **Company Invitations** list with a **Saved** status.

Note: You can send the invitation at a later time.

- To send this invitation, go back to the **Invitation List** and open this invitation. Click **Actions** > **Send Now**.

Create a User Invitation

To create and send reusable invitations

- In Community Manager, click **Invitation Tool**.

The **User Invitations** list displays.

- Click **Actions** > **Create Invitation**.

The Step 1: Invitation Details page opens.

- Enter all the information.

Field	Description
Inviting Company	Click Invite on Behalf of Another Company to select the company of the user you are sending this invitation to.
Invitation Name	Enter a unique, descriptive name for the invitation.
Invitation Type	Select either <ul style="list-style-type: none"> ■ Unique if this is an invitation that you are sending one time to a specific recipient or group of recipients. A unique Invitation Code is assigned to each recipient. ■ Generic if this is an invitation that is sent multiple times to different recipients. The Invitation Code is the same for all recipients.
Approval Type	After an invitee (prospective user who receives the invitation) receives this invitation and registers on the Trading Grid, the invitee must be approved before the user can access the Trading Grid. Select either <ul style="list-style-type: none"> ■ Manual if you want the Approver to individually approve or reject each invitee that registers. We strongly recommend this option for all Generic invitations because the invitation code in a generic invitation is not specific to any one recipient, and could be distributed to unintended registrants. ■ Automatic if you want Trading Grid to automatically approve each invitee for you. GXS recommends that you select this option for any invitation sent to a single individual, because the recipient can begin using the service as soon as they respond to the invitation.
Registration Status Notification	Enter the email address(es) of the people who want or need to be kept up-to-date of the invitee's registration status,. For example, if they registered, if the registration was approved.

Field	Description
Expiration Date	The final date that the Trading Grid accepts the invitee's registration; this is the date that the Invitation Code supplied in this invitation expires.
Notes	Enter up to 4,000 characters of explanatory information that is for your use only — the invitee cannot see this information. The Trading Grid truncates anything over 4,000 characters; look at the Count Characters box below this field to ensure you stay within the 4,000 limit .

4 Click **Next Step**.

The Step 2: Services page opens.

5 Select the **Service Instances** and the options/ For example. privileges, for each package that you want the user to have.

Note: By default, all options are selected for any Service Instance.

6 Click **Next Step**.

On the Step 3: Recipient Details page opens.

7 Do the following:

Email Address(es)	Enter the Email Address(es) — Address(es) of the recipient(s). Separate multiple addresses by a semi-colon (;), comma (,), or a blank space.
Image	Optionally upload an image, e.g., a company logo, to appear in the invitation.
Email Language	Enter the Email Language — Select the language of the invitation text.
Email Content	Click the Edit from Template link, change the text (in the new page) as desired. Click Submit to use the text for the invitation.

8 Click **Next Step**.

The Step 4: Review page opens.

9 Review the information, especially the Service Selection packages and privileges.

To make changes, click **Previous Step** to go back to the applicable step and make your changes. Then, click **Next Step** to return to this page.

10 Do one of the following.

- To save the invitation information without sending it, click **Finish**. The invitation displays in the **User Invitations** list with a **Saved** status.

Note: You can send the invitation at a later time.

- To both send and save the invitation, click **Send**. The invitation displays in the **User Invitations** list with an **Active** status.

Modify a Company or User Invitation Details

You can modify invitations according to the following rules.

Rules

- The invitation **Status** must be **Active** or **Saved**.
- If the **Invitation Type** is **Generic**, you can modify the **Recipient Details** fields only. For example, you might want to send this specific invitation to another group of invitees.
- If the **Invitation Type** is **Unique**, you can modify the **Email Content** field only. For example, you might want to send a follow-up reminder to the invitee(s).

To modify an invitation

- 1 In Community Manager, click **Invitation Tool**.
- 2 Find the applicable invitation in the lists.
Important: You can only modify an invitation with an **Active** or **Saved** status.
- 3 Click the name of the invitation.
 - For a **Generic** invitation, you can only modify the **Recipient Details** fields.
 - For a **Unique** invitation, you can only modify the **Email Content** field.
- 4 Do one of the following.
 - To save the invitation information without sending it, click **Save**. The invitation displays in the applicable **Invitation List** with a **Saved** status.
Note: You can send the invitation at a later time.
 - To both send and save the invitation, click **Send Now**, or **Resend** if the invitation is **Unique**. The invitation displays in the applicable **Invitation List** with an **Active** status.

On-Boarding and Self-Registration

GXS Support creates the “hub” or “parent” company for you. This enables you, as the “hub” or “parent” company, to invite (via an invitation) your user community companies, also known as “spoke” or “child” companies, to register with the GXS Trading Grid for the purpose of exchanging data and documents.

Create Invitation for “Spoke” or “Child” Companies

Invitations are sent out by the “hub” or “parent” company to “spoke” or “child” companies in the community.

To create an invitation

- 1 Log into TGO, and on the left side of the page, click **Invitation Tool** > **Actions** > **Invite GXS Customer**.
The Invitation List page appears.
- 2 Click **Actions** > **Invite GXS Customer**.
The Step 1: Invitation Details page displays.

- 3 Enter the invitation details. For field help, click the **Help** link and search for the field or page name. When finished, click **Next Step**.
The Step 2: Service(s) page displays.
- 4 For the **Service Type** select **Active Invoice Delivery**.
The page redisplay.
- 5 For the **Service Type** select the applicable service bundle. Then, select the **Active Invoices Compliance** option (i.e., the "Do you want to . . ." option).
The page redisplay.
- 6 For the **Legal Profile Name**,
 - a Click **Submit**. Then, click **Search Legal Profile**.
 - b In the Legal Profile popup that displays, enter the name of your company's legal profile.
 - c Click **Search**.
 - d Select the applicable sender's Legal Profile name.
- 7 For **Process Type**, select the applicable value from the drop down list.
- 8 For **Delivery Mode**, select **Secure Email Delivery**.
- 9 Click **Next Step**.
The Step 3: Recipient Details page displays.
- 10 Enter the recipient details. For field help, click the **Help** link and search for the field or page name. When finished, click **Next Step**.
The Review page displays.
- 11 Review your invitation data. Use the **Previous Step** and **Next Step** buttons to make any changes. When finished, click **Send Now** to send and save the invitation.

Self-Registration Steps for Suppliers

You should have received an email similar to the following that invites your company to trade within the community.

Your company is invited to participate in the GXS Trading GridSM to trade with SecureEmail_Hub. GXS Trading GridSM is a unique global integration platform that enables and streamlines cross-enterprise business processes. With extreme flexibility and a services-oriented business-to-business platform, the Grid helps customers automate global trading communities by shielding complexity from rapidly changing standards, eliminating manual and duplicative efforts and enabling a new level of process integration and business intelligence.

In order to register, please make sure that you are authorized to provide company specific information such as your company address, contact and billing information. You may register using the following link:

<https://qtg.qa.gxsonline.net/registration/base/emailCode.do?invitationCode=5700015610&page=1>

If you access the Grid registration process directly instead of using the link, you will be asked to provide the following invitation code: 5700015610. If you are an existing Trading GridSM user, please login to access this invitation from the Message Center:

<https://qtg.qa.gxsonline.net/TigerPortal>

- 1 Follow the instructions in your email by clicking the first link in your email.
Or:
 - a Click the Access the Trading Grid directly by clicking the second link in your email.
 - b When prompted, enter the invitation code supplied in the email.
 - c Click **Submit**.The Identify Your Company page appears.
- 2 Enter the information and click **Submit**.
The Overview page appears.
- 3 Carefully read the information and click **Next Step** to begin the registration.
The Agreement page displays.
- 4 To accept the Service Agreement, the **Accept** option. Then click **Next Step**.
The My Profile page displays.
- 5 Enter all of your company data. For field help, click the **Help** link and search for the field or page name. When finished, click **Next Step**.
The Legal Profile for Receiver page displays.
- 6 Enter all of your company data. For field help, click the **Help** link and search for the field or page name. When finished, click **Next Step**.
The Review page displays.

- 7 Review your registration data. Use the **Previous Step** and **Next Step** buttons to make any changes. When finished, click **Submit**.

Assuming you made no mistakes, the Registration Complete page appears. From here you can log into Trading Grid and download your invoices.

Self-Registration Steps for Buyers

You should have received an email similar to the following that invites your company to trade within the community.

Your company is invited to participate in the GXS Trading GridSM to trade with SecureEmail_Hub. GXS Trading GridSM is a unique global integration platform that enables and streamlines cross-enterprise business processes. With extreme flexibility and a services-oriented business-to-business platform, the Grid helps customers automate global trading communities by shielding complexity from rapidly changing standards, eliminating manual and duplicative efforts and enabling a new level of process integration and business intelligence.

In order to register, please make sure that you are authorized to provide company specific information such as your company address, contact and billing information. You may register using the following link:

<https://qtg.qa.gxsonline.net/registration/base/emailCode.do?invitationCode=5700015610&page=-1>

If you access the Grid registration process directly instead of using the link, you will be asked to provide the following invitation code: 5700015610. If you are an existing Trading GridSM user, please login to access this invitation from the Message Center:

<https://qtg.qa.gxsonline.net/TigerPortal>

- 1 Follow the instructions in your email by clicking the first link in your email.
Or:
 - a Click the Access the Trading Grid directly by clicking the second link in your email.
 - b When prompted, enter the invitation code supplied in the email.
 - c Click **Submit**.

The Identify Your Company page appears.
- 2 Enter the information and click **Submit**.
The Overview page appears.
- 3 Carefully read the information and click **Next Step** to begin the registration.
The Service Subscription page displays.
- 4 Do the following.
 - a Select the service and click the **Subscribe to Selected Service** option.
 - b On the next page, select your pricing option and any **Optional Features** you want.
 - c Click **Accept Pricing**.

The Agreement page displays.
- 5 To accept the Service Agreement, click the **Accept** option. Then, click **Next Step**.

The My Profile page displays.

- 6 Enter your data and login information. Then click **Next Step**.

The Company Profile page displays.

- 7 Enter all of your company data. For field help, click the **Help** link and search for the field or page name. When finished, click **Next Step**.

The Legal Profile for Sender page displays.

- 8 Create the legal profile. For field help, click the **Help** link and search for the field or page name. When finished, click **Next Step**.

The Partnership page displays.

- 9 Enter your EDI Address information, or select the option for the system to create it. Then click **Next Step**.

The Review page displays.

- 10 Review your registration data. Use the **Previous Step** and **Next Step** buttons to make any changes. When finished, click **Submit**.

Assuming you made no mistakes, the Registration Complete page appears. From here you can log into Trading Grid to send and receive documents.

Pending Registrations

After an invitee receives an invitation from the company, the company receiving forms from an IWF-subscribed company or the individual user must register before the Invitee appears on the **Invited Companies** or **Invited Users** list. After the Invitees are on this list, you must approve them as users of the Trading Grid, before they can access the service.

To approve or reject registrants

- 1 In Community Manager, click **Pending Registrations**.

Note: The default **Approval Status** for each company or user is **Pending**.

- 2 For the applicable company or user, change the **Approval Status** to **Approve** or **Reject**.
- 3 Click **Actions** > **Submit**.
A confirmation page opens showing your selections.
- 4 For any Invitee Rejected, type explanatory text into the **Reasons for Rejection** box.
- 5 After reviewing the confirmation page, click **Actions** > **Confirm**.
Trading Grid generates and sends an email to each invitee notifying them of your approval or rejection.

Important

- After you reject or approve a company or user, Trading Grid removes that person from the Invited list.
- After approving a company, the company is listed in the **Company List** in the **Company Management** section.
- After approving a company user, that person is listed under in its **Users** list in the **User Management** section.
- If you mistakenly approved a company user, delete the user from Trading Grid in the **User Management** section.
- If you mistakenly rejected a user, resend the invitation or create and send a new invitation. The user must re-register.

This chapter describes the role of company System Administrators for Trading Grid Online and explains how to use the Account Manager Tab to set up and manage user accounts.

Topics include:

- [“Overview” on page 310](#)
- [“Company Profile Information” on page 311](#)
- [“Manage User Accounts” on page 313](#)
- [“Trading Relationships” on page 323](#)
- [“Company Subscription” on page 339](#)
- [“Mailboxes and EDI Addresses” on page 339](#)
- [“Service Contacts” on page 345](#)
- [“Messaging Service Alerts and Options” on page 349](#)
- [“Active Document Status Alerts” on page 360](#)
- [“Active Document Data Policies” on page 362](#)
- [“Active Invoice Legal Profiles” on page 364](#)
- [“Machine Users” on page 377](#)
- [“Mailboxes and Mailslots” on page 378](#)
- [“Cross-Reference Tables” on page 380](#)
- [“Billing” on page 383](#)
- [“Policy” on page 385](#)

Important: All components and links discussed in this chapter might not display, depending on your Company's subscription agreement and your permissions assigned by your Company Administrator.

Overview

From the Account Manager, you perform most of the administrative tasks associated with your mailbox and manage trading partnerships. These partnerships are important to your Trading Grid Messaging Service (TGMS) mailbox because you cannot exchange documents with a Trading Partner unless a trading partnership first is created and approved by both parties.

Trading Grid Online users can log on, and work with TGMS mailboxes. Creating a new user bypasses the invitation process and allows users in your company direct

access to Trading Grid Online. When you when create a new user account, you also set the user's their role and access rights.

Note: Each mailbox must have at least one associated EDI address. A mailbox may also have optional mailslots.

Navigation Panel

The Navigation Panel displays the functions you can perform in the Account Manager.

Link	Description
Company Profile	View or update your Company information.
User Management	Create, activate, remove, update, etc., invitations and Trading Grid users at your Company.
Trading Community	View, update, or remove the companies with which you have trading partner relationships View, update, or remove the companies which have trading partner relationships with you.
Subscription	View or change your Subscription Options.
Service Configuration	Set or change your document or file notification options.
Billing	Print or view your invoiced bills.
Policy	Set or change password defaults or restrictions that apply to all users at your Company; review and modify other business policies.

Company Profile Information

The Company Profile page is the Account Manager home page. If a company's profile information changes, update the profile accordingly.

The Company Profile page consists of these sections:

Section	Description
Profile Status	System generated data.
Organization Hierarchy	If your company has child companies, select the Allow to create child company(s) option.
Company Information, Business Contact, Technical Contact	Company and company contact information. One person might be multiple contacts. Contacts receive user invitations after the company subscribes to Trading Grid.

To change the company profile

- 1 Review the the Company Profile information and update it with new information if it has changed since the company was registered.

Account Manager: Company Profile

Company Profile

Actions

* Indicates a required field.

Profile Status

Current Status: Active
Created Date: Tuesday, October 21, 2014
Created By: System
Last Updated Date: Tuesday, October 21, 2014
Updated By: System

Organization Hierarchy

Child Company(s): None
Hierarchy Access: Allow to create child company(s)

Company Information

Company Name: DMN00E1ZTP
Address Line 1: DMN00E1ZTP
Address Line 2:
City/Town: DMN00E1ZTP
State/Province: DMN00E1ZTP
ZIP/Postal Code: 11233
(Required for United States, Canada and United Kingdom)
Country: India
Website:
Industry Type: Chemicals And Allied Products
D-U-N-S Number: --
(xxxxxxx-xxxx, where x is digit)
Primary SIC Code: 1170 - Adhesives and sealants
1171 - Agricultural chemicals, non
1172 - Adhesives and cements
1173 - Biological products, exc diagnostic
1174 - ...
Company Number:
UCCEAN Number:
(Required if using ASN services)
Global Location Number :
Test/Demo Company: Yes [View Details](#)

Business Contact

First/Given Name: DMN00E1ZTP
Last/Family Name: DMN00E1ZTP
Telephone: 212121212
Fax:
Extn:
Email: vdyakalma@ga.com
(e.g. john.doe@opentext.com)

Technical Contact Same as Business Contact

First/Given Name: DMN00E1ZTP
Last/Family Name: DMN00E1ZTP
Telephone: 212121212
Fax:
Extn:
Email: vdyakalma@ga.com
(e.g. john.doe@opentext.com)

Sponsoring Trading Partners (only for non-Messaging Service company)

Is this company a hub, hosting a community? If yes, specify whether it may be paying for some or all of its trading partners.

Yes

Billing Profile(s)

Note: OPENTEXT cannot bill against profiles containing double-byte characters (e.g Traditional Chinese Characters). Please do not enter this in billing profile, only in company profile above.

Select	Default	Billing Profile Name	Country	Tax Exempt	Tax Exempt #
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DEFAULT	United States	No	

One item found.

Other Billing Details (only for non-Messaging Service company)

Billing Suppressed? Yes, for days
(You will not be billed for the time period specified from the joining date)

2 To save the changes, do one of the following.

- Click **Actions** > **Save**.
- Click **Save**.

Manage User Accounts

Trading Grid Online User Management service allows you to:

- Create and manage accounts for users in your company.
- Create, send, and resend invitations to users and Trading Partners.

Topics include:

- [“Create Company User Accounts” on page 313](#)
- [“Invite Company Users” on page 318](#)
- [“User Action History” on page 322](#)

Create Company User Accounts

Creating a user through the User Management service registers the user immediately and bypasses the invitation process. After you create the user account following these steps, that person is ready to access and work within Trading Grid Online.

User List

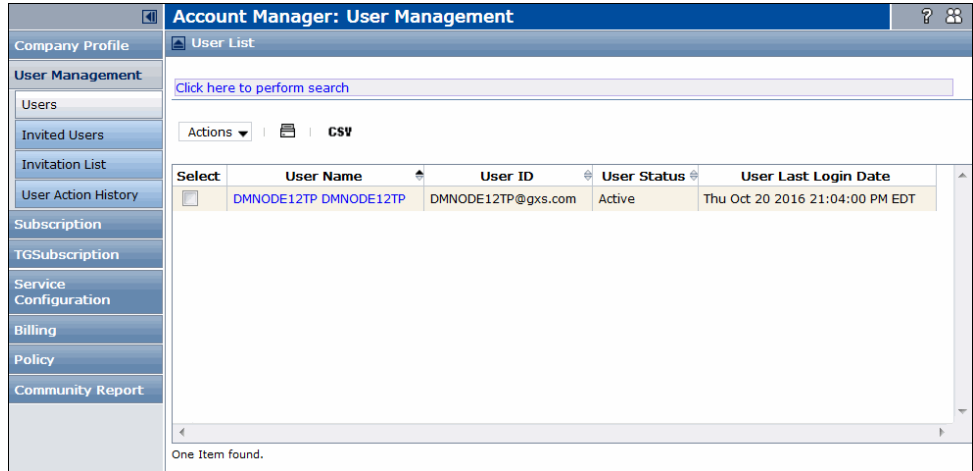
On the left side of the page, when you click the **Users** link, the Users list page opens. This area lists all of your Company users, and for each user displays the

- **User Name** of the user — Click the name to see more information about the user.
- **User ID** — Generally, this is the user's email address.
- **Status** — Whether the user is currently
 - **Active** — The user registered and was approved to participate in Trading Grid Online.
 - **Inactive** — The user registered, but is not currently participating in Trading Grid Online.
 - **Incomplete** — The user registered, but has not yet been approved to participate in Trading Grid Online - see the [“Approve Invited Users”](#) topic.

Add New Users

To add a new user

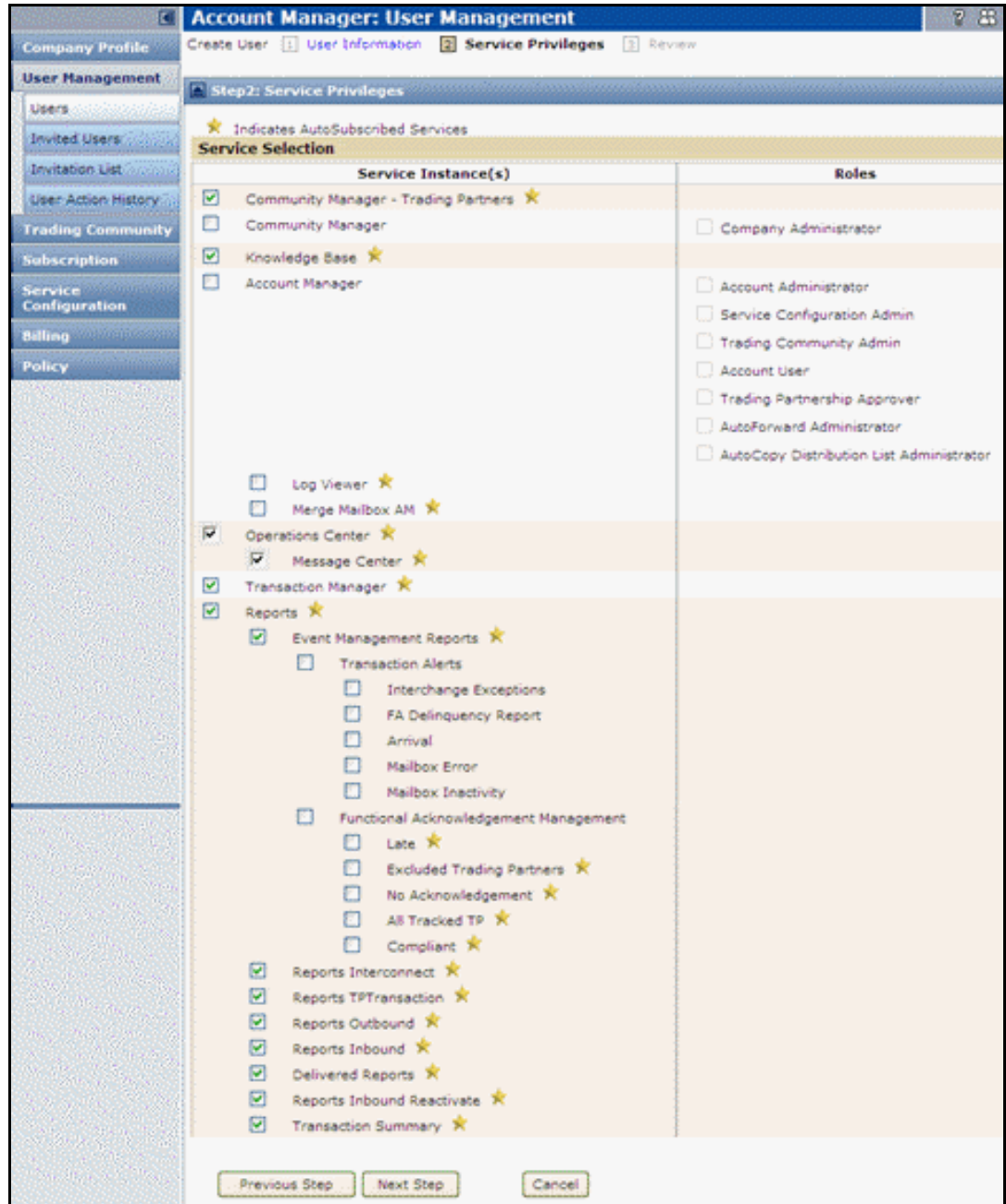
- 1 Click **User Management**.
- 2 The Account Manager: User Management page displays the User's tab and User List by default.



- 3 Click **Actions** > **Create New User**.
The Step 1: User Information page opens.
- 4 Provide the applicable user information.

The screenshot shows the 'Step 1: User Information' form. It is divided into two main sections: 'Personal Information' and 'Login Information'. The 'Personal Information' section includes fields for First/Given Name, Last/Family Name, Address Line 1, Address Line 2, City/Town, State/Province, ZIP/Postal Code, Country (dropdown), Preferred Language (dropdown), Telephone (with Extn. field), Fax, Email, Time Zone (dropdown), and Preferred Date Format (dropdown). The 'Login Information' section includes fields for User ID (e-mail), Password, and Retype Password. There is a 'View Password Policy' link. At the bottom, there is a checkbox for 'I would like to receive OPENTEXT marketing materials' and a paragraph of text regarding privacy policy authorization. 'Cancel' and 'Next Step' buttons are at the bottom.

- 5 Click **Next Step**.
The Step 2: Service Privileges page opens.



- 6 Under **Service Instance(s)**, select the subscription package(s) and options (privileges) for each service instance you want the user to have.
- 7 Under **Roles**, select the role of the new user. All roles have access to the user functions (Service Instances) that are subscribed to by the Company.

Role	Access to Administrative Functions
Company Administrator	All of the administrative functions of Trading Grid Online, subscribed to by all Companies in his/her community. These functions are in both the Community Manager and Account Manager components.

Role	Access to Administrative Functions
Trading Community Admin	The Trading Community functions in Account Manager that are subscribed to by the company. These can include <ul style="list-style-type: none"> ■ Requesting and approving trading partnerships. ■ Defining and maintaining the AutoForwarding of messages. ■ Setting up and maintaining the AutoCopy distribution lists.
Account User	None. This user does not have access to any of the administrative functions in Account Manager.
Account Administrator	All of the administrative functions in Account Manager that are subscribed to by his/her Company. These include: <ul style="list-style-type: none"> ■ Maintenance of the Company Profile. ■ Inviting or setting up, and maintenance of, Company users (User Management). ■ Administration of the Trading Community and its distribution list. ■ Subscription modification. ■ Service Configuration, which can include: <ul style="list-style-type: none"> ■ Setting up and maintaining mailbox information ■ Defining and setting company or mailbox rules and alerts ■ Mailslotting ■ Monitor Billing invoices. ■ Define or update the company Password Policy.
Service Configuration Admin	The Service Configuration functions in Account Manager that are subscribed to by his/her Company.
Trading Partnership Approver	Only the Trading Community function of approving trading partner relationships (EDI to EDI).
AutoForward Administrator	Only the Trading Community function of setting up and maintaining AutoForward partnerships.
AutoCopy Distribution List Administrator	Only the Trading Community function of defining and maintaining AutoCopy distribution lists.

- 8 Click **Next Step**.
- 9 On the Step 3: Review page, carefully review the information, especially the Service Selection instances and options.
- 10 Do the following:
 - a To make any changes, scroll down and click **Previous Step**.
 - b Return to the applicable step and make your changes.
 - c Click **Next Step** to return to this page.
- 11 Click **Submit** to enter the person into Trading Grid Online.

Note: If you do not enter data for all required fields, **Submit** is de-activated. If you do not yet want this person activated in Trading Grid Online, click **Save** to save the data you entered. The user appears in the Users list with an **Incomplete** status. You can activate the user later.

12 Click **User Management**.

The user created displays in the User List . .



13 Repeat these steps for each user you need to create.

See also

- "To modify user data"
- "To activate, deactivate, or delete a user"

Modify User Data

To modify user data

- 1** Click **User Management**.
- 2** In the section that expands, click **Users**.
- 3** Find and select the applicable user from the list.
Important: You can only select a user with an **Active** or **Inactive** status.
- 4** Do one of the following:
 - Click **Actions** > **Update**.
 - Click the applicable **User Name**.

The User Information page opens.

- 5** Change the applicable information.
- 6** Click **Service Privileges** tab to change the users package(s) or roles.
See User Role definitions in "Create Company User Accounts" on page 313.
- 7** Click **Update** to enter save and activate the changes.
Note: **Update** is inactive if you did not enter data into all required fields. To permanently remove the user and all their data from Trading Grid Online, click **Delete**.

Activate, Deactivate, or Delete a User

You can activate, deactivate, or delete users one at a time or in groups. When you select multiple users, you can only perform one of the three actions. For example, five users are selected for activation only.

To activate, deactivate, or delete a user

- 1 Select the user(s).
- 2 From the **Actions** drop-down list, select:
 - **Activate** to authorize the user to access Trading Grid Online.
 - **Deactivate** to temporarily prevent the user from using Trading Grid Online.
 - **Delete** to permanently remove the user and all their data from Trading Grid Online.
- 3 Click **Yes**.

Invite Company Users

You can easily create and send reusable invitations that invite the user to register.

Important: If you do not [“Create Company User Accounts” on page 313](#) in Trading Grid Online, you must send them an invitation to register on Trading Grid Online.

Topics include:

- [“Invitation List” on page 318](#)
- [“Create an invitation” on page 319](#)
- [“Modify Invitation Details” on page 320](#)
- [“Send or Resend Invitation” on page 321](#)
- [“Approve Invited Users” on page 321](#)

Invitation List

When you click the **Invitation List** link, the Invitation List page opens. This area lists all the invitations that you created, and for each invitation, displays the

Field	Description
Invitation Name	<ul style="list-style-type: none">■ Name given to that invitation when it was created.
Invitation Type	<ul style="list-style-type: none">■ Generic — A generic invitation is a reusable invitation for sending to one or more recipients. Each recipient has the same Invitation Code.■ Unique — A unique invitation is a one-time invitation that you send to one or more recipients. Each recipient has a unique Invitation Code, enabling you to easily track each recipient's response.
Status	<ul style="list-style-type: none">■ Saved — The invitation has not yet been sent.■ Active — Invitees can now register using this Invitation Code.■ Expired — The Invitation Code within the invitation has expired.■ Terminated — The invitation is inactive. That is, nobody can register with this Invitation Code.
Expiration Date	<ul style="list-style-type: none">■ Date that the Invitation Code in the invitation expires.
Creator	<ul style="list-style-type: none">■ Name of the person who created the invitation.

Create an invitation

To create an invitation

- 1 Click **User Management**.
- 2 In the section that expands, click **Invitation List**.
- 3 Above the Invitation List, click **Actions > Create Invitation**.

The On the Step 1: Invitation Details page opens.

- 4 Enter the following information.

Field	Description
Invitation Name	Enter a unique, descriptive name for the invitation.
Invitation Type	Select either <ul style="list-style-type: none"> ■ Unique if this is an invitation that you are sending one time to a specific recipient or group of recipients. A unique Invitation Code is assigned to each recipient. ■ Generic if this is an invitation that you send multiple times to different recipients. The Invitation Code is the same for all recipients.
Registration Status Notification	Enter the email address(es) of the people who want or need to be kept up-to-date of the invitee's registration status, e.g., if they registered, if the registration was approved.
Approval Type	After an invitee (prospective user who receives the invitation) receives this invitation and registers on Trading Grid Online, the invitee must be approved before the user can access Trading Grid Online. Select either <ul style="list-style-type: none"> ■ Manual if you want the Approver to individually approve or reject each invitee that registers. We strongly recommend this option for all Generic invitations because the invitation code in a generic invitation is not specific to any one recipient, and could be distributed to unintended registrants. ■ Automatic if you want Trading Grid Online to automatically approve each invitee for you. We recommend that you select this option for any invitation sent to a single recipient, because then the recipient can begin using the service as soon as they respond to the invitation.
Expiration Date	The final date Trading Grid Online accepts the invitee's registration; this is the date the Invitation Code supplied in this invitation expires.
Notes	Enter up to 4,000 characters of explanatory information that is for your use only — the invitee does not see this information. Trading Grid Online truncates anything over 4,000 characters; check the Count Characters box that displays to ensure you stay within the 4,000 limit.

- 5 Click **Next Step**.

On the Step 2: Service Privileges page opens.

- 6 Select the subscription package(s) and the options (privileges) for each package you want the user to have.
By default, all options are selected for any Subscription Package that you select.

7 Click **Next Step**.

The Step 3: Recipient Details page opens.

8 Do any of the following:

- Enter the recipient details now.

Field	Description
Email Address(es)	Type the recipient(s) address(es). Separate multiple addresses by a semi-colon (;), comma (,), or a blank space.
Email Language	Select the language of the invitation text.
Email Content	Invitation text. Do the following: <ol style="list-style-type: none"> 1 Click the Edit from Template link. 2 Change the text (in the new page). 3 Click Submit to use that text for the invitation.

- Save the invitation and enter the details later.

Note: You cannot send the invitation without the recipient details.
Enter the

9 Click **Next Step**.

10 On the Step 4: Review page, do the following:

- a Carefully review the information, especially Service Selection packages and privileges.
- b To make changes, click **Previous Step** and return to the applicable step and make your changes.
- c Click **Next Step** to return to this page.

11 Do one of the following.

- To save the invitation information without sending it, click **Finish**.
The invitation appears in your "[Invitation List](#)" on page 318 with a **Saved** status. You can send the invitation later.
- When you complete Step , click **Send Now** to send and save the invitation.
The invitation appears in your "[Invitation List](#)" on page 318 with an **Active** status.

Modify Invitation Details

You can modify invitations according to the following rules:

The invitation Status must be Active or Saved.

- If the Invitation Type is Generic, you can modify the Recipient Details fields only. For example, you might want to send this specific invitation to another group of invitees.
- If the Invitation Type is Unique, you can modify the Email Content field only. For example, you might want to send a follow-up reminder to the invitee(s).

To modify an invitation

- 1 Click **User Management**.
- 2 In the section that expands, click **Invitation List**.
- 3 Find the applicable invitation in the list.
Note: You can only modify an invitation with an **Active** or **Saved** status.
- 4 Click the name of the invitation.
- 5 Modify the invitation. Note the following:
 - For a **Generic** invitation, you can only modify the **Recipient Details** fields.
 - For a **Unique** invitation, you can only modify the **Email Content** field.
- 6 Do one of the following.
 - To save the invitation information without sending it, click **Finish**.
 The invitation appears in your "[Invitation List](#)" on [page 318](#) with a **Saved** status. You can send the invitation later.
 - To save and send the invitation, click **Send Now**.
 The invitation appears in your "[Invitation List](#)" on [page 318](#) with an **Active** status.

Send or Resend Invitation

You can send any invitation with a **Saved** status; you can resend any invitation with a **Unique** invitation type and an **Active** status.

To send or resend invitations

- 1 Click **User Management**.
- 2 In the section that expands, click **Invitation List**.
- 3 Find and select the applicable invitation(s) in the list.
- 4 Above the User Invitations list, click **Actions** > **Send/Resend**.

Approve Invited Users

After the Invitee receives the invitation he or she must register before the Invitee appears on the Invited Users list. After the Invitees are on this list, someone must approve them as users of Trading Grid Online, before they can access the service.

When you click the **Invited Users** link, the Invited Users list page opens. This area lists the people that responded to your invitations and have registered. These people are waiting for someone to approve them as users of Trading Grid Online. For each person, the list displays:

Field	Description
Approval Status	Everyone in this list has a Pending status. After you approve or reject a user, that user is eliminated from this list.
User Name	Click the name to see more information about the user.
Request Type	What the invitation is for; for example, User Registration.
Role	The user's role as defined by your community; for example, Administrator.
Invitation Name	Name of the invitation sent to this person. Click the name to see the invitation contents.

Field	Description
Inviting Company	Name of the company that sent the invitation.
Tracking ID	ID the user was assigned upon registration completion. This ID might be used to track the status of a registration; for example, if it is still pending approved.
Date Registered	Date the person submitted their registration data.

To approve or reject an invitation

- 1 Click **User Management**.
- 2 In the section that expands, click **Invited Users**.
- 3 Find the applicable user(s) in the list.
The default **Approval Status** for each user is **Pending**.
- 4 For applicable user(s), change the Approval Status to **Approve** or **Reject**.
- 5 Above the Users listing, click **Actions** > **Submit**.
A confirmation page opens showing your selections.

Note: For any Invitee you **Reject**, you must enter an explanation in the **Reasons for Rejection** box.

- 6 Carefully review the confirmation page, click **Actions** > **Confirm**.
Trading Grid Online immediately generates and sends an email to each invitee, notifying them of your approval or rejection.

Important:

- After you reject or approve a user, Trading Grid Online removes that person from the Invited Users List.
- If you approved the invitee, that person now appears in your ["User List"](#) on page 313.
- If you mistakenly approved a user, you can delete the user from Trading Grid Online.
- If you mistakenly rejected a user, you must either resend the invitation or create and send a new invitation, and the user must re-register.

User Action History

This is an audit log that provides a history and accounting log of activities performed by each company user. Querying capabilities let you find activities based on various search parameters and view detailed information on their history.

You can search for activities by:

Field	Description
User	Select from the drop-down list showing all users in your Company.
Date/Time Range	Select either a specified range or a "last number of days" option.
Action Code	Select from a comprehensive drop-down list.
Details	Enter text into the box; for example, an ILOG number.
Service	Enter the complete internal ID number of the session.

You can filter your search results by

Field	Description
User Name	Enter the complete name of the user. Note: There is one additional entry for OpenText Client Services, which filters to all act-on-behalf-of entries.
Session ID	This filter is for a OpenText Client Services help desk associate to help you with any problems. A session ID number is assigned to you when you log in and determines which actions were performed within the user session.
Action Code	Enter the applicable Action Code.
Service	Enter the complete internal ID number of the session.
Impersonated User	This filter is for a OpenText Client Services help desk associate to help you with any problems.

To access user action history

- 1 On the Account Manager tab, click **User Management**.
- 2 The page expands.
- 3 Click **User Action History**.
 The User Action History page opens.

Trading Relationships

Important: Trading Relationships are handled differently.

This section describes the company's Trading Partner Relationships. A Trading Partner Relationship defines the unique relationship between your company and a business trading partner for each type of document you send or receive electronically. This means that you could define several different Trading Partner Relationships for each business partner. A trading partner relationship identifies who and where they send documents to and receive documents from within the Trading Community.

There are several types of trading partner relationships you can set up.

Topics include:

- ["For Intelligent Web Forms \(IWF\) Users only"](#)
- ["For IWF Users only"](#)
- ["About your Trading Community"](#)
- ["Current Trading Partner List"](#)
- ["Standard Trading Partnership" on page 326](#)
- ["Open Trade Partnership" on page 330](#)
- ["AutoForward Partnership" on page 333](#)
- ["AutoCopy Partnership" on page 336](#)

For Intelligent Web Forms (IWF) Users only

For IWF Users only

Your Trading Partnerships were defined when you registered or by your Community Manager. Use the Trading Community page to search for, view, modify, or remove Trading Partner Relationships.

Search for Trading Partners

To search for a specific Trading Partner

See the [“Search for Trading Partners”](#) on page 324.

View Trading Partner Data

To view trading partner data

- 1 On the Account Manager tab, click **Trading Community**.
- 2 Click **Company Name**.

Details for the Trading Partner display.

Remove a Trading Partner Relationship

To remove a trading partner relationship


- 1 On the Account Manager tab, click **Trading Community**.
- 2 Scroll through the list of companies or search for the applicable trading partner company.
- 3 Click **Select** next to the applicable company.
- 4 Click **Actions** > **Delete Partnership**.

Important: After you delete a partnership, Trading Grid Online:

- Removes all associated forms, maps, templates for the trading partner.
- Retains all the received and sent documents or files until they expire.

Create a New Trading Partner Relationship

To create a new trading partner relationship

- 1 You must contact Technical Support.
- 2 Click  (**Contact**) icon to contact technical support by email, telephone, or online chat.

About your Trading Community

Trading Grid Online allows you to create and manage trading partnerships by providing three types of partnerships.

- A *Standard Trading Partnership* is where you send (and receive) transactions with that Trading Partner only. After you set this up, you can then:
 - Automatically forward documents you receive from this partner to other users using a distribution list.

- Automatically send a copy of documents you send to this partner to other users via a distribution list.
- An *Open Trade* is where you can send (and receive) transactions with any Trading Partner within Trading Grid Online. This is the simplest and most convenient trading type in that you can trade with other “open” traders without having to set up any trading partnerships. An Open Trade
 - Allows you to exchange documents with any Trading Partner that requests to trade with you at that EDI address.
 - Enforces a 50-50 split billing process. This means your company pays for all the transactions that you send and the receiver's company pays for the transactions that you receive and for the storage of that mailbox.
- A *Group Trade* is a partnership set up between you and a group EDI addresses and then send a copy of documents that you send to this Group to other partners using a distribution list. If you set up an Open Trade, the EDI address that you specify can send (and receive) interchanges to any trading partner within Trading Grid Online.

Current Trading Partner List

To see a listing of the your current trading partners

- 1 Click the **Account Manager** tab in Trading Grid Online.
The Company Profile page opens.
- 2 Click **Trading Community**.
The Trading Community page opens.

The screenshot shows the 'Community Manager: Trading Community' interface. On the left is a navigation menu with options like 'Company Profile', 'User Management', and 'Trading Partners'. The main content area is titled 'Trading Partners' and contains a table with the following data:

Select	Mailbox Alias	Trading Partner	Partner VAN	Partner EDI Address	Your EDI Address	Your Role	Partners
<input type="checkbox"/>		RAHC Company	GXS Company	:11A1TESTPP	ZZSD:1111	Receiver	Non
<input type="checkbox"/>		RAHC Company	GXS Company	:11A1TESTPP	ZZSD:1111	Sender	Non

Below the table, it says '2 Items found.' There is also a section for 'Open Tradings' which currently shows no results and a 'Request New Open Trading' button.

This page displays two listings. The **Trading Partners** list displays the current partnerships and the following information for each Trading Partnership.

Column	Description
Mailbox Number	The mailbox number(s) associated with this role and partnership.
Trading Partner	Identification of the Trading Partner.
Partner VAN	The network used in this partnership.
Partner EDI Address Your EDI Address	The EDI addresses of both your company and the Trading Partner. Click the Trading Partner EDI Address to see information about the partnership.
Your Role	Whether you are a Sender of interchanges or a Receiver of interchanges. If you Send and Receive documents with this trading partner, two partnerships display for this Mailbox number and trading partner.
Partnership Type	Type of partnership, where <ul style="list-style-type: none"> ■ AutoCopy means that Trading Grid Online automatically sends one interchange to multiple receivers. ■ AutoForward means that Trading Grid Online automatically forwards interchanges that the you receive to another Trading Partner EDI Address(es). ■ Normal refers to any standard Trading Partnership setup.
Status	Current partnership status, where <ul style="list-style-type: none"> ■ Approved means that the trading partnership is currently active. ■ Pending Partner Approval means that the Trading Partner has not yet responded to the trading partnership request.

The second listing, the **Open Tradings** list, displays the EDI addresses that have open trading.

Standard Trading Partnership

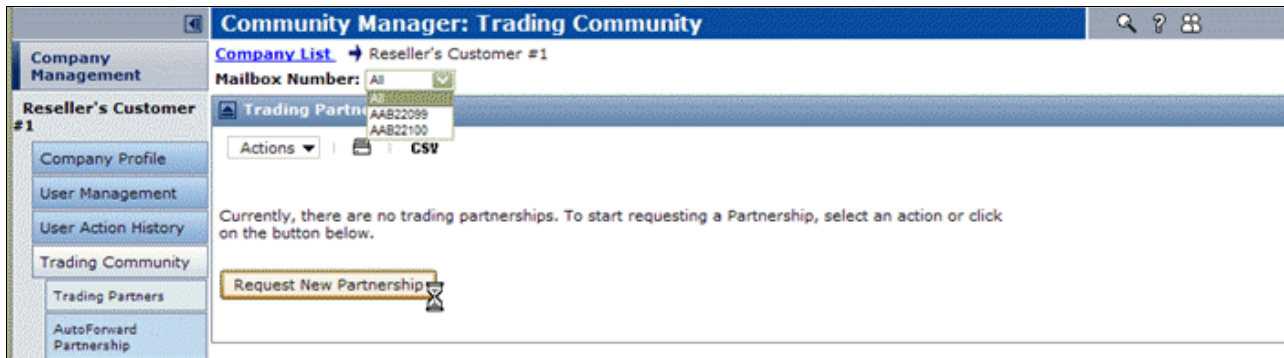
A *standard trading partnership* is set up so you can send (and receive) transactions with one specific trading partner. This partnership can then be further defined to:

- Automatically forwards documents they receive from this partner to other users using a distribution list.
- Automatically sends a copy of documents sent to one partner to other users using a distribution list.

To request a standard trading partnership.

- 1 On the Account Manager tab, click **Trading Community**.

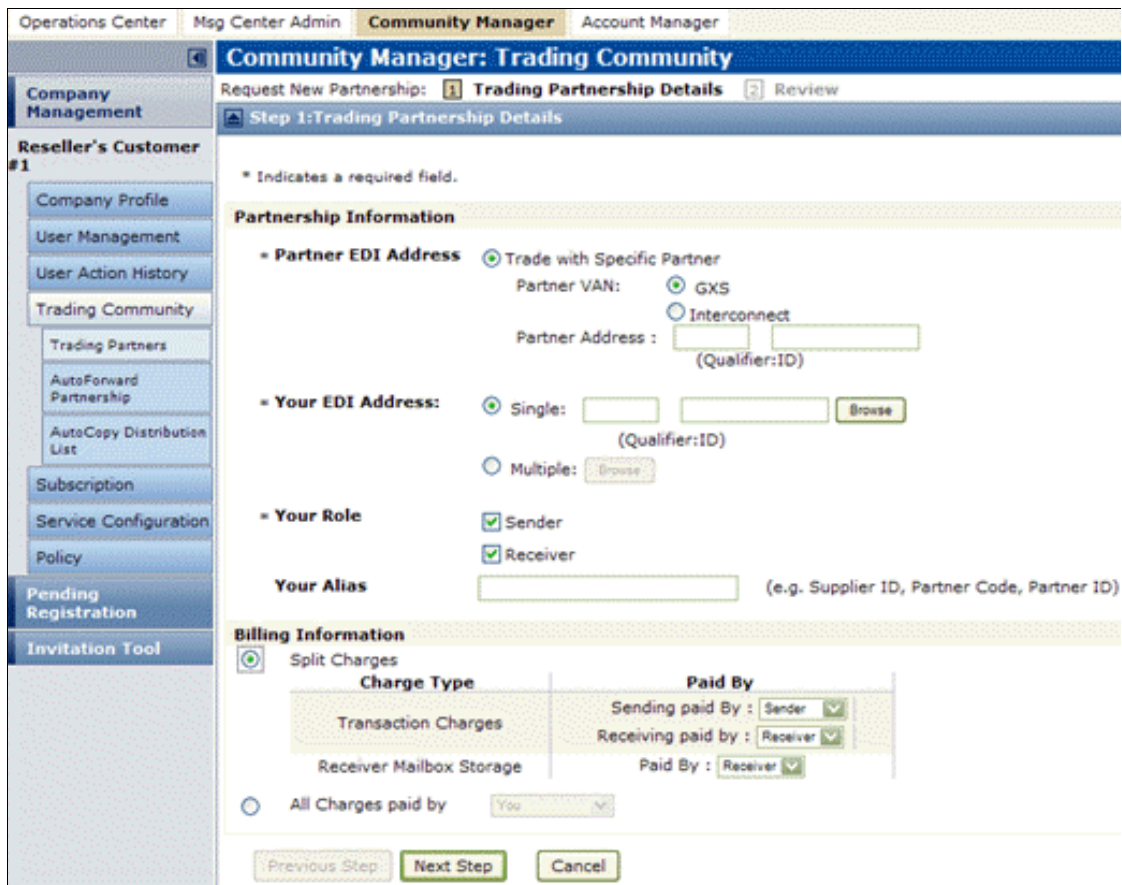
The Trading Community Company List page opens.



2 Do any of the following that apply:

- If your company has multiple mailboxes, select the applicable mailbox for the new partnership from the **Mailbox Number** list, or select **All**.
- If this is your first partnership, click **Request New Partnership**.
- If this is *not* your first partnership, click **Actions > Request New Partnership**.

The Step 1: Trading Partner Details page opens.



3 In the **Partnership Information** section, enter the following information:

Field	Description
Partner EDI Address	Do the following: If necessary, click Trade with Specific Partner . In Partner VAN , do one of the following: <ul style="list-style-type: none"> ■ Select GXS if trading partner is on the Trading Grid Online network. ■ Select Interconnect if trading partner is on another VAN service. In Partner Address , enter the trading partner's EDI address.
Your EDI Address	Do one of the following: <ul style="list-style-type: none"> ■ Click Single. Type your EDI address or click Browse and select the address. ■ Click Multiple. Click Browse and select the address.
Your Role	Click Sender and/or Receiver check boxes based on your role(s) in the trading partner relationship. If you select both Sender and Receiver , Trading Grid Online creates two partnerships for this Mailbox number and trading partner.
Your Alias	Type a name that represents you to the trading partner.

4 In the **Billing Information** section, select the billing option established by you and the trading partner.

5 Click **Next Step**.

6 Do one of the following:

- If you entered an **Interconnect EDI Partner Address** in Step 3 which does *not* currently exist in Trading Grid Online, a message displays. To add the EDI partner address, continue with the following three steps.



1 Click the **Add Partner Address** link.

The **Add Interconnect Partner EDI Address** page opens.

2 Enter the following information.

Field	Description
Partner EDI Address	Type trading partner's EDI address.
Interconnect Name	? Use Select drop-down list to select the Interconnect Name .
Company Name	Type trading partner's company name.
Contact First Name	Type trading partner's contact information.
Contact Last Name	Type trading partner's contact information.
Contact Phone Number	Type trading partner's contact phone number.

3 Click **Submit**.

Note: The Step 2: Review page opens.

7 Do any of the following that apply:

- Review the information.
- To make any changes, click **Previous Step** to return to Step 1 page.
- Make the changes, click **Next Step** to return to this page.

8 Click **Submit**.

The Trading Partnership Request Complete page opens.

9 Click **Return to Trading Partnership List**.

The Trading Partnerships list page opens. The new partnership displays in the list with a type of **Normal** and a status of **Pending Partner Approval**.

To approve or reject, view, modify, or terminate a Standard Partnership

You can only modify the billing information. To modify other partnership details, you must first delete the current partnership and then create a new partnership with the correct details.

- 1 On the Account Manager tab, click **Trading Community**.
- 2 In the **Trading Partnerships** listing, select the partnership to approve, reject, view, change, or terminate.
- 3 Do any of the following that apply.

To . . .	Do this . . .
Approve partnership	Click Actions > Approve Partnership . The partnership status changes to Approved . Note: Only a partnership with Pending Your Approval can be approved.
Reject partnership	Click Actions > Reject Partnership . The partnership status changes to Rejected . Note: Only a partnership with Pending Your Approval can be rejected.
Terminate partnership	Click Actions > Delete Partnership . The partnership is immediately removed from the listing.
View or modify partnership	Click Actions > View/Modify Partnership . The Trading Partnership Details page opens. Note: You can only modify the billing information. To modify other partnership details: Delete the partnership. Create a new partnership with the correct details.
Change partnership type	To change Partnership to AutoForward, see “AutoForward Partnership” on page 333 . To change Partnership to AutoCopy, see “AutoCopy Partnership” on page 336 .

- 4 Click **Save**.

Open Trade Partnership

An *open trade partnership* allows you to send (and receive) transactions with any trading partner within Trading Grid Online. Trading documents and/or files with other “open” traders does not require a formal partnership setup. An *Open Trade Partnership*:

- Allows you to exchange documents with any trading partner that requests to trade with you at that EDI address.
- Enforces a 50-50 split billing process, which means your company pays for all the transactions that it sends, and the receiver's company pays for the transactions that you receive and for the storage of that mailbox.

To request an open trade partnership

- 1 On the Account Manager tab, click **Trading Community**.
The Trading Community Company List page opens.

- 2 In the **Open Tradings** section, do any of the following that apply:
 - If your company has multiple mailboxes, select the applicable mailbox for the new partnership from the **Mailbox Number** list, or select **All**.
 - If this is your first partnership, click **Request New Partnership**.
 - If this is *not* your first partnership, click **Actions** > **Request New Partnership**.

The Step 1: Open Trading Details page opens.

Request New Open Trading: **Open Trading Details** Review

Step 1: Open Trading Details

Partnership Information

+ Your EDI Address Browse
 (Qualifier:ID)

+ Your Role
 Sender
 Receiver

Billing Information

Charge Type	Paid By
Transaction Charges	Sending paid By : Sender Receiving paid by : Receiver
Receiver Mailbox Storage	Paid By : Receiver

Previous Step Next Step Cancel

- 3 In the **Partnership Information** section, enter:
 - **Your EDI Address** — Type your EDI address or click **Browse** and select it.
 - **Your Role** — If you expect to send and receive interchanges, click **Receiver** check box.
- 4 Click **Next Step**.

The Step 2: Review page opens.

Request New Open Trading: 1 Open Trading Details 2 Review

Step 2: Review

Please review the partnership request below. To make any changes, click the applicable link above to return to that section.

Partnership Information

Your EDI Address : ZZ : JDZULTRA
Your Role : Sender/Receiver

Billing Information

Split Charges

Charge Type	Paid By
Transaction Charges	Sending paid By : Sender Receiving paid by : Receiver
Receiver Mailbox Storage	Paid By : Receiver

Previous Step Submit Cancel

5 Do the following:

- Review the information.
- To make any changes, click **Previous Step** to return to Step 1 page.
- Make the changes, click **Next Step** to return to this page.

6 Click **Submit**.

The Open Trading Request Complete page opens.

7 Click **Return to Trading Partnership List**.

The Trading Partnerships page opens displaying the new partnership in the **Open Tradings** listing.

Mailbox Number: 4

Trading Partnerships

Select	Mailbox Number	Trading Partner	Partner VAN	Partner EDI Address	Your EDI Address	Your Role	Partnership Type	Status
<input type="checkbox"/>	ADW13787	GXS PCS TRAINING DEPARTMENT	GXS Company	ZZ:WALLYTEST	ZZ:JDZ00005	Receiver	Normal	Approved
<input type="checkbox"/>	ADW13787	GMK JUSTIN D-2 HTTPS	GXS Company	ZZ:JDZHTTPS	ZZ:JDZ00005	Receiver	Normal	Approved
<input type="checkbox"/>	ADW13787	Demo_Hub	GXS Company	ZZ:DEMOHUB01	ZZ:JDZ00005	Receiver	Normal	Approved
<input type="checkbox"/>	ADW13787	GSS EMEA	GXS Company	ZZ:GSSEMEA	ZZ:JDZ00005	Receiver	Normal	Approved

Items 1 - 4 of 53

Open Tradings

Select	Your EDI Address	Your Role
<input type="checkbox"/>	ZZ:JDZ00005	Sender/Receiver

One item found.

For each open Trading, the listing displays:

- **Your EDI Address** — Click the EDI Address to see information about the partnership.
- **Your Role** — Displays your role in the partnership; **Sender** of interchanges or **Sender and Receiver** of interchanges.

To view, modify, or delete an open trade partnership

- 1 On the Account Manager tab, click **Trading Community**.
- 2 Find the applicable company and click the name.
- 3 In the section that expands, click **Trading Community**.
- 4 In the **Open Tradings** listing, select the partnership to view, change, or terminate.
- 5 Do any of the following that apply:

Action	Do this
Delete Open Trading (partnership)	Select the partnership, click Actions > Delete Open Trading . The partnership is removed from the listing.
View/Modify Open Trading	<ol style="list-style-type: none"> 1 Select the partnership, click Actions > View/Modify Open Trading. 2 View the partnership information. Note: Only the billing information can be modified. To modify other partnership details, the partnership must be deleted then recreated with the correct details. 3 Make changes to the billing information.

- 6 Click **Save**.

AutoForward Partnership

A *group trade partnership* allows you to set up a partnership between the yourself and a group EDI address. Trading Grid Online then sends a copy of each document that you send to this Group to the other partners in the Group via a distribution list.

The *AutoForward partnership* feature automatically forwards interchanges that you receive to another EDI Address. For example, a large department store sends Purchase Orders to you. Your Sales organization requires a copy of the POs, but the department store does not sent the POs to them. The AutoForward feature automatically forwards the Purchase Orders to the Sales organization on your behalf.

With AutoForwarding, the data flows as follows between trading partners. PartnerA sends to PartnerB. OpenText then AutoForwards the data from PartnerB to PartnerC. In this scenario, before an AutoForward partnership is set up, there must be active trading partnerships between:

- PartnerA and PartnerB
- PartnerB and PartnerC

Use the *AutoCopy* feature to send one interchange to multiple receivers. First, create a Distribution List which has its own valid EDI address. Then send an interchange to the receiver EDI address, which is the Distribution List. Trading Grid Online sends a copy of the interchange to each member in the Distribution List.

Before setting up an AutoCopy Distribution List, active trading partnerships between the sender's EDI address and each of the EDI addresses defined in the Distribution List must be set up. A partnership between the sender's address and the Distribution List EDI address is not required.

Important: See ["AutoForward Implications"](#) on page 334.

AutoForward Implications

With AutoForwarding, the data flows as follows between trading partners. PartnerA sends to PartnerB. OpenText then AutoForwards the data from PartnerB to PartnerC. In this scenario, before an AutoForward partnership is set up, there must be active trading partnerships between

- PartnerA and PartnerB
- PartnerB and PartnerC

Based on this scenario described:

- When data is AutoForwarded from PartnerB to PartnerC, PartnerC sees the data coming from PartnerB, not PartnerA.
 - When PartnerA sends an interchange to PartnerB, PartnerA's address is in the sender's position of the interchange header, and PartnerB's address is in the receiver's position.
 - When OpenText AutoForwards the data, PartnerB's address is placed in the sender position of the interchange header and PartnerC's address is placed in the receiver position. This is because Partner A did not send to PartnerC; PartnerB did. Therefore, the data received by PartnerC must show that PartnerB sent it.
 - OpenText sends a copy of the interchange from Partner B to PartnerC. Most likely PartnerC creates a Functional Acknowledgment (or control message) and sends it back to PartnerB. Unfortunately, since PartnerB's EDI Translator software did not send the original document to PartnerC, it does not know how to reconcile the FA.
- It is OpenText policy that after data is put on the network it becomes the property of the receiver. Therefore, only the original receiver (PartnerB) can request an AutoForward partnership.

Both senders and receivers can set up AutoForwarding partnerships.

Note: For an AutoForwarding partnership established by the sender on the sender's account, Trading Grid Online does not inform the receiver about the partnership, and vice versa.

Set up an AutoForward Partnership

Important: Before setting up an AutoForward partnership, Trading Partnerships must exist and be approved between:

- The address that sends the interchanges and the address that receives the interchanges.
- The address that receives the interchanges and the address to which you want to forward the interchanges.

To set up AutoForwarding

- 1 On the Account Manager tab, click **Trading Community**.
- 2 Find the applicable company and click the name.
- 3 In the section that expands, click **Trading Community > AutoForward Partnership**.

4 Click **Actions** > **Create AutoForward Partnership**.

Note: If no listing displays, click **Create AutoForward Partnership** again.
The Create AutoForward Partnership page opens.

5 In the **AutoForward EDI Address** section, enter the following:

- **Sender EDI Address** — Address from where the interchanges are sent.
- **Your EDI Address** — EDI address that receives the interchanges that you forward.
- **AutoForward EDI Address** — EDI address to which the interchanges (that are sent from the **Sender EDI Address** to **Your EDI Address**) should be autoforwarded.

Note: Use **Search** to search and select specific addresses. Click **Search by Company** to display a pop-up to enter a partial or complete name, then click **Search**. To view a listing of all companies, click **Search** without entering any search criteria. Then click the company name, and if applicable, select an address.

6 To forward only specific document types, in the **Document Type** section, select the appropriate **Envelope Type**.

The page refreshes displaying all associated document types in the **Available Document Types** area.

7 Do one of the following:

- To select one document type, select the type then click **Add**.
- To select multiple document types:
 - 1** Press **Ctrl** and select the types.
 - 2** Release **Ctrl**, and click **Add**.
- To select all document types, click **Add All**.

The selection displays in **Selected Document Type** area.

8 To remove document types:

- Select the type(s) and click **Remove**.
- To remove all types, click **Remove All**.

9 Click **Actions** > **Submit**.

A confirmation message displays. The AutoForward Partnership is created.

10 Use the AutoForward Partnerships page to view this new partnership.

To view, modify, or terminate an AutoForward Partnership

- 1** On the Account Manager tab, click **Trading Community**.
- 2** Find the applicable company, and click the name.
- 3** In the section that expands, click **Trading Community** > **AutoForward Partnership**.

The AutoForward Partnership listing opens.

4 Do any of the following that apply:

Action	Do this
Delete Partnership	<ol style="list-style-type: none"> 1 Select the partnership, click Actions > Delete. The confirmation message displays. 2 Click Yes. The partnership is immediately removed from the listing.
View/Modify Partnership	<p>Only Document Types are modified. To modify an EDI address, you must delete the current partnership, then create a new partnership with the correct EDI address.</p> <p>To add a document type to be forwarded:</p> <ol style="list-style-type: none"> 1 Select partnership, click Actions > View/Modify. 2 Locate Available Document Type area and do one of the following: <ul style="list-style-type: none"> ■ Select one document type then click Add. ■ Select multiple document types by clicking Ctrl and selecting document types. Release Ctrl and click Add. ■ Select all document types by clicking Add All. Your selection displays in the Selected Document Type area. <p>To stop a document type from being forwarded:</p> <ol style="list-style-type: none"> 1 Select partnership, click Actions > View/Modify. 2 Locate the Selected Document Type area and do one of the following: <ul style="list-style-type: none"> ■ Select one document type then click Remove. ■ Select multiple document types by clicking Ctrl and selecting document types. Release Ctrl and click Remove. ■ Select all document types by clicking Remove All.

5 Click **Actions > Submit**.

AutoCopy Partnership

The AutoCopy Partnership is a *group trade partnership* that you set up between yourself and a group EDI address. Trading Grid Online then sends a copy of each document you send to this Group to other partners using a distribution list. This partnership is similar to the AutoForward Partnership. See ["AutoForward Partnership" on page 333](#).

The *AutoCopy* feature allows you to send one interchange to multiple receivers. This is done by creating a distribution list that has its own valid EDI address. So when you send an interchange to the receiver EDI address (the distribution list), Trading Grid Online sends a copy of the interchange to each of the members in that distribution list.

Before an AutoCopy Distribution List is set up, there must be active trading partnerships between the sender's EDI address and each of the EDI addresses in

the Distribution List EDI address. A partnership between the sender's address and the Distribution List EDI address is not required.

Important: See [“AutoCopy Implications” on page 337](#).

AutoCopy Implications

When sending EDI data, the Distribution List is the receiver EDI Address for your data. When Trading Grid Online processes the interchange, the Distribution List address is removed from the data and is replaced by an EDI Address from the distribution list. This process is repeated for each address in the list.

The sender might not be able to reconcile Functional Acknowledgements. The sender's software typically expects FAs back from the address used in the outbound data (the distribution list), but the FAs do not come back to the sender from the distribution list address. They come from the trading partner addresses. Either the original receivers must prevent FAs being sent back to the sender, or the sender has to turn off FA reconciliation.

Use AutoCopy with AutoForward

This feature can also be used in conjunction with an AutoForward partnership. When used with AutoForwarding, the data flows as follows between trading partners. PartnerA sends to PartnerB. OpenText then AutoForwards the data from Partner B to PartnerC. Extending this scenario, you can use a distribution list that you create as the PartnerC address in the AutoForward setup. This enables you to AutoForward documents from PartnerA to multiple PartnerCs, where each PartnerC is defined within the distribution list.

An AutoCopy Distribution List

To create an AutoCopy distribution list

- 1 On the Account Manager tab, click **Trading Community**.
- 2 Find the applicable company and click the name.
- 3 In the section that expands, click **Trading Community > AutoCopy Distribution List**.
- 4 Click **Actions > Create Distribution List**.

Note: If no listing is displayed, click **Create Distribution List**.

The Create Distribution List page opens.

- 5 Enter the following information.

Field	Description
Mailbox Number	Type the number of the Mailbox that receives the interchanges.
Distribution List Address	Type the EDI address that receives the interchanges Trading Grid Online copies and sends.
Member EDI Addresses	Type the EDI addresses to which Trading Grid Online should send the copied interchanges. To add more than 10 addresses, scroll to the bottom of the page, then click Add .
Primary Billing Address	Select Primary Billing Address if this EDI address is the primary billing address. Otherwise, leave this item un-selected.

6 Click Actions > Submit.

A confirmation message displays. The AutoCopy Distribution List is created.

7 Use the AutoCopy Distribution List page to view this new partnership.**To view, modify, or delete an AutoCopy Distribution List****1** On the Account Manager tab, click **Trading Community**.**2** Find the applicable company, click the name.**3** In the section that expands, click **Trading Community > AutoCopy Distribution List**.

The Autocopy Distribution List page opens displaying all the listing information including:

- **Mailbox Number** — Mailbox that receives the interchanges.
- **Distribution List Address** — EDI address that receives the interchanges Trading Grid Online copies and sends.

4 Do any of the following that apply:

Action	Do this
Delete	<ol style="list-style-type: none"> 1 Select the distribution list, click Actions > Delete. 2 Confirm the deletion. The distribution list is removed from the listing.
View/Modify	<ol style="list-style-type: none"> 1 Select the distribution list, click Actions > View/Modify. 2 View the distribution list information. Note: Only the Member EDI Address information can be modified. To modify other distribution list information, the distribution list must be deleted then recreated with the correct details. 3 Make the changes to the list. <ul style="list-style-type: none"> ■ To modify a Member EDI Address, delete it, and then add the correct one. ■ To delete a Member EDI Address, select it, then click Actions > Delete. The address is removed from the list. ■ To add a new Member EDI Address, type the address in Add Member EDI Address, then click Add. ■ To specify whether an address is the primary billing address, select or deselect the Primary Billing Address option.

5 Click Save.

The Subscription page displays your current subscription details. From this page you can view or change your GXS subscriptions (see ["To view or update your subscription" on page 339](#)).

Important: Because of the many new and existing Trading Grid Online functions, GXS recommends you work with your GXS Representative to modify your company's subscription package.

Company Subscription

To view or update your subscription

- 1 Click the **Account Manager** tab > **Subscription** > **Current Subscription**.
- 2 If necessary, select the applicable mailbox.
- 3 Click **Actions** > **View Subscription** or **Change Subscription Options**, whichever is applicable.

Mailboxes and EDI Addresses

This section describes how to configure an EDI mailbox. The procedures describe how to:

- Update the EDI mailbox information.
- Add other EDI addresses to mailboxes.
- Specify data retention.
- Select reports to receive.

Topics include:

- ["Configure EDI Mailboxes" on page 339](#)
- ["Add or Delete Mailbox Addresses" on page 341](#)

Configure EDI Mailboxes

To configure an EDI mailbox

- 1 On the Account Manager tab, click **Service Configuration** > **Mailbox and EDI Address**.

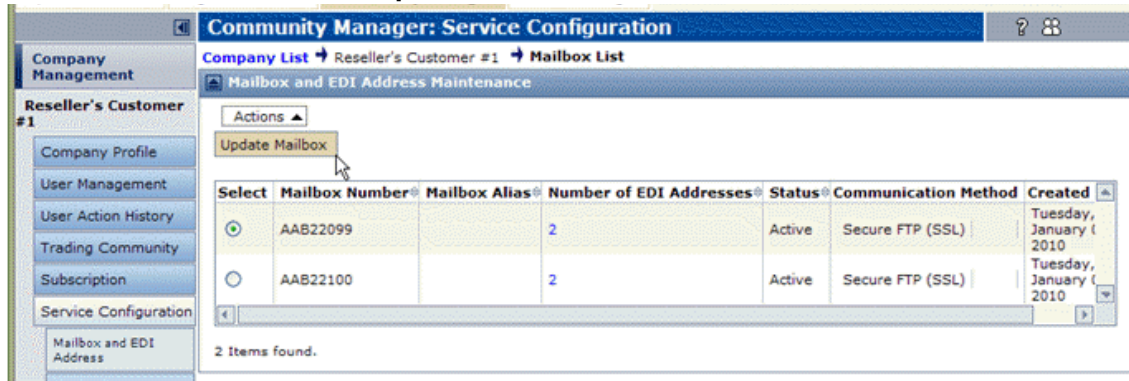
The Mailbox and EDI Address Maintenance page opens displaying a listing of the EDI Mailboxes associated with this account.

Select	Mailbox Number	Mailbox Alias	Number of EDI Addresses	Status	Communication Method	Created
<input type="radio"/>	AAB22099		2	Active	Secure FTP (SSL)	Tuesday, January (2010)
<input type="radio"/>	AAB22100		2	Active	Secure FTP (SSL)	Tuesday, January (2010)

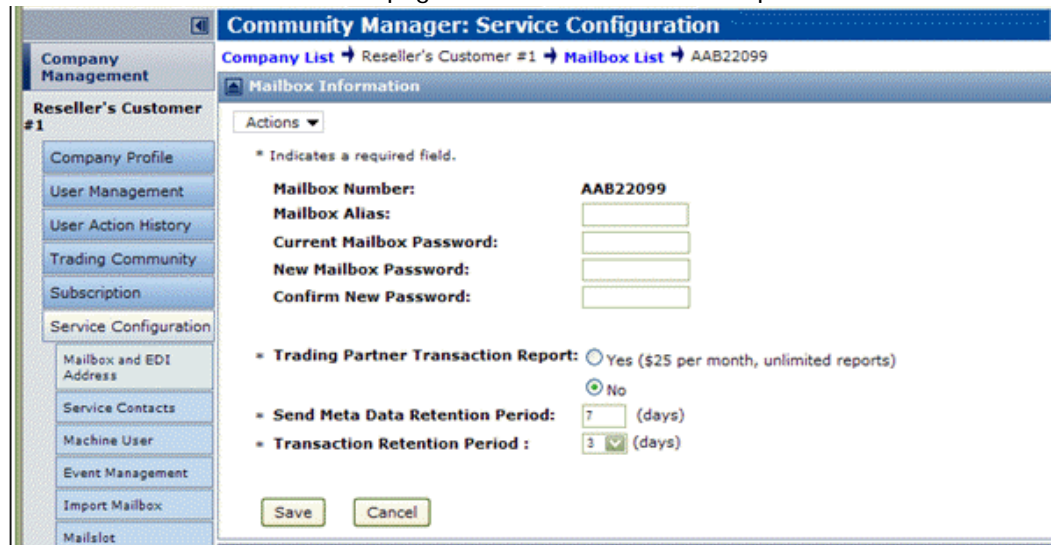
2 Items found.

- 2 To configure the mailbox options, select the applicable mailbox.

3 Click **Actions** > **Update Mailbox**.



The Mailbox Information page for the selected mailbox opens.



4 Specify the following information.

Field	Description
Mailbox Number	Displays the number for the mailbox. This value cannot be changed.
Mailbox Alias	Do one of the following: <ul style="list-style-type: none"> To add an alias for the mailbox, type the value. To change the value displayed, delete the existing value and enter another value.
Current Mailbox Password	Do one of the following: <ul style="list-style-type: none"> To add a password for the mailbox, type the value. To change the value displayed, delete the existing value and enter another value. Enter the current password for the mailbox.
New Mailbox Password	To define a new password for the mailbox, type the password.
Confirm New Password	To confirm the password, type the password again.

Field	Description
Trading Partner Transaction Report	This report summarizes the transactions and interchanges sent and received between you and your trading partners during the previous month. The report lists each transaction, a description, and the number of KCs for each trading partner. Click Yes to subscribe to this report.
Send Meta Data Retention Period	Specify the number of days to retain meta information on data sent from your mailbox/EDI address.
Transaction Retention Period	Specify the number of days each transaction interchange should remain in your mailbox, up to a maximum of 45 days. Note: This option might have billing implications. GXS recommends you contract your OpenText sales representative before selecting this option.

- 5 Click **Save**.
- 6 Repeat steps 2-5 for each mailbox associated with the customer account.

Add or Delete Mailbox Addresses

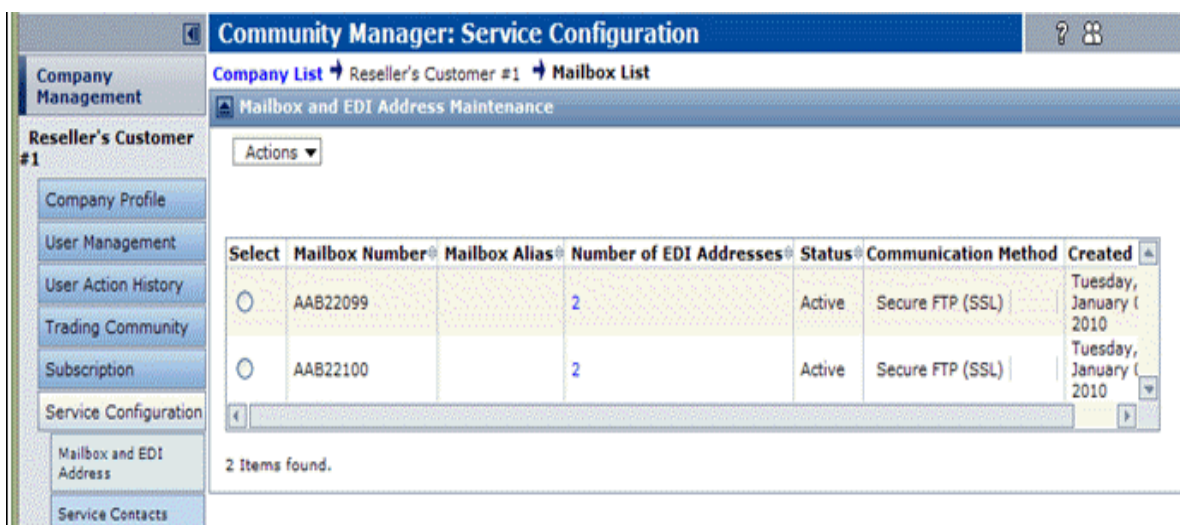
You can only add or delete EDI addresses. To modify an EDI address, you must delete the incorrect address and then re-add the correct address, as specified below.

Important: You cannot delete an EDI address if there are trading partnerships currently associated with the address. You must check for and terminate any associated Partnerships before deleting the EDI address. See [“Terminate Associated Partnerships”](#) on page 343.

To add addresses in a mailbox

- 1 On the Account Manager tab, click **Service Configuration > Mailbox and EDI Address**.

The Mailbox and EDI Address page opens listing the EDI Mailboxes that are associated to this account.



- 2 In the **Number of EDI Addresses** column, click the number for the applicable mailbox.

The EDI Address List page opens.



3 Scroll down to the **Add New EDI Address** area and enter the information.

4 Click **Add**.

A confirmation message displays.

5 Click **Return to EDI address list** link.

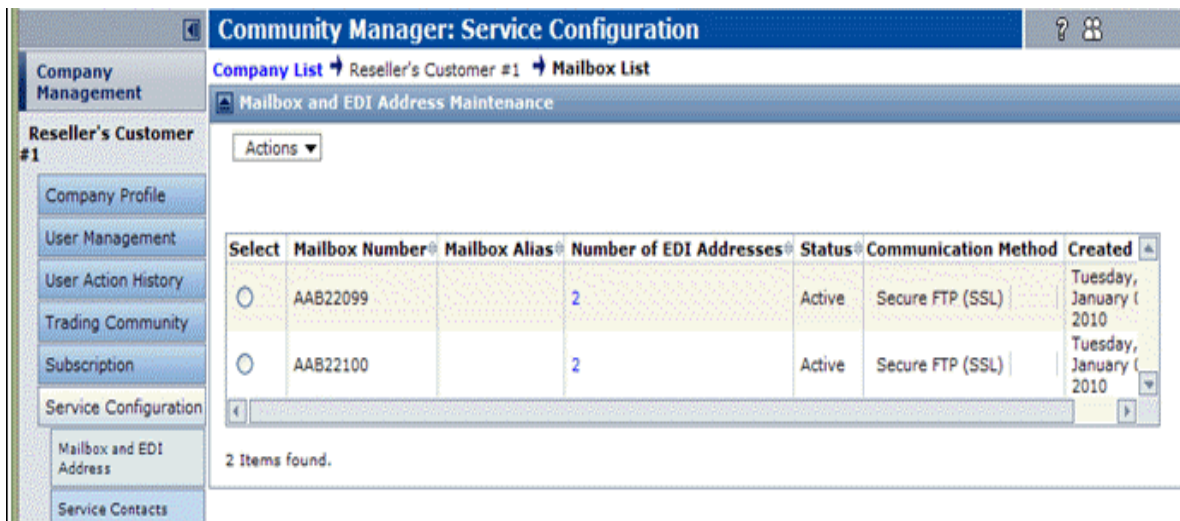
6 Repeat Steps 2-4 to add additional addresses to the mailbox.

This completes the adding EDI addresses to a mailbox procedure.

To delete an EDI address from a mailbox

1 On the Account Manager tab, click **Service Configuration > Mailbox and EDI Address**.

The Mailbox and EDI Address page opens displaying a listing of the EDI Mailboxes associated with this account.



2 In the **Number of EDI Addresses** column, click the number for the applicable mailbox.

The EDI Address List page opens.



Important: You cannot delete an EDI address if there are trading partnerships currently associated with the address. You must check for and terminate any associated Partnerships before deleting the EDI address. See ["Terminate Associated Partnerships"](#) on page 343.

- 3 Locate applicable EDI address.
- 4 In **Associated Partnerships?** column, click the applicable **view partnership** link.
- 5 Select the address to delete.
- 6 Click **Actions > Delete EDI Address**.
A confirmation message displays.
- 7 Click **OK**.

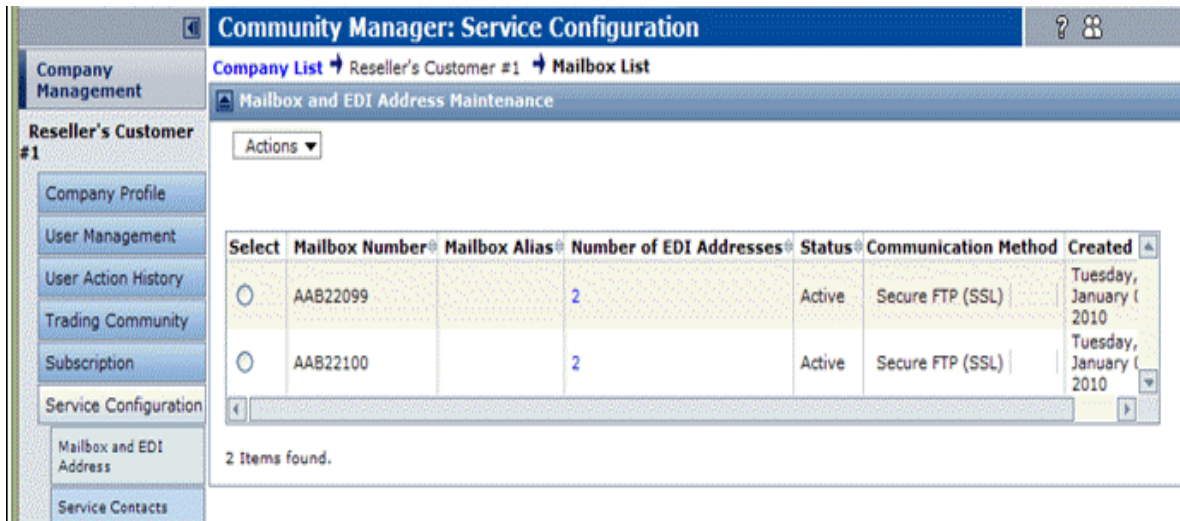
Terminate Associated Partnerships

Before deleting an EDI address, you must first verify whether any associated partnerships exist that reference the EDI address. If partnerships do reference the address, then the partnerships must be terminated so the EDI address can be deleted.

To verify and terminate associated partnerships

- 1 On the Account Manager tab, click **Service Configuration > Mailbox and EDI Address**.

The Mailbox and EDI Address Maintenance page opens.



- In the **Number of EDI Addresses** column, click the number for the applicable mailbox.

The EDI Address List page opens displaying the EDI addresses and associated partnerships for the selected Mailbox number.



- Locate the EDI address that needs to be deleted.
- Do one of the following:
 - No link displays in the **Associated Partnerships?** column, close the page and continue to ["Add or Delete Mailbox Addresses"](#) on page 341.
 - The **View partnership** link displays in **Associated Partnerships?** column, click the link.

Identify the partnership(s) that need to be terminated then return to the **Mailbox and EDI Address Maintenance** page. Continue to step 5.

- Click **Trading Community**.
The EDI Address list page opens.
- Terminate the partnership(s).
- Continue to ["Add or Delete Mailbox Addresses"](#) on page 341.

Service Contacts

Service Contacts is a centralized area where you define who is to:

- Receive specific email notifications at the company level
- Be the default contact for service messages and outages
- Be notified as a result of the rules and alerts you later define for your mailbox(es)

Important: All contacts to be notified as a result of rules and alerts defined in **Event Management** must be set up using Service Contacts.

Topics include:

- ["Define Service Contacts" on page 345](#)
- ["Re-Assign a Default Contact" on page 347](#)
- ["Remove a Default Contact" on page 347](#)
- ["View, Change, or Delete a Contact" on page 348](#)

Define Service Contacts

To define service contacts

- 1 Click the **Account Manager** tab > **Service Configuration** > **Service Contacts**.

The Service Contacts page opens. It lists any contacts that have been defined. For each contact, the listing shows:

- First and last name.
- A list of alerts the person is contacted about (**Contact Type** column).
- If the person is a **Default** contact. Trading Grid Online automatically designates the Technical Contact entered in the Company Profile as the default contact. You can change the default contact (see ["Re-Assign a Default Contact" on page 347](#)).
- If the person is currently active (**In-Use** column).

- 2 Click **Actions**, and click **Add New Contact**.



The Create New Contact Service page opens.

3 Enter the required information.

Operations Center | Msg Center Admin | **Community Manager** | Account Manager

Community Manager: Service Configuration

Create New Service Contact

Actions ▼

* Indicates a required field.

Contact Details

* **Last/Family Name:** Johnson (max. 50 char.)

* **First/Given Name:** Robert (max. 25 char.)

* **Telephone:** 3014445050

Extn:

* **Time Zone:** (GMT -05:00) America/New_York

Daylight savings time observed

* **Preferred Language:** English

Contact Type :

Invitation

Community Manager - Company

Transaction Event Alerts

Arrival Alerts

Mailbox Error Alert

Inactivity Alert

Notification Method

* **Email Address:** robert.johnson@customer1.com (Max. 80 char.)
(e.g. john.Doe@gxs.com)

This is a Pager address.

Submit Cancel

4 Optionally, select the **Contact Type(s)**, or which contacts should receive notification(s) in addition to service messages and outages.

Note: Based on the company's service subscription, you might not see all the options listed. If in doubt, check with your OpenText sales representative.

■ For **Intelligent Web Forms (IWF) Users:**

- **Invitation** — Contact receives subsequent invitations, such as invites for the company to connect to an additional IWF hub sponsoring new forms. IWFS customer only.
- **Incoming Document Alert** — "Whenever a new document arrives in your Document Inbox" rule.
- **Incoming File Alert** — "Whenever a new file arrives in your File Inbox" rule.

■ For **Trading Grid Online Messaging Service Users:**

- **Arrival Alerts** — "Whenever a document interchange arrives in your mailbox" rule.
- **FA Delinquency** — "Whenever a trading partner has a delinquent FA" rule.
- **Inactivity Alert** — "Whenever a mailbox is inactive" rule.
- **Mailbox Error Alert** — "Whenever a mailbox processing error occurs on an outbound interchange" rule.

Note: When you select an option for a customer contact, Trading Grid Online automatically adds the contact to the notification list for alerts you create later. For example, if you subscribe to and select **Arrival Alert** for this contact, and

define a rule to generate an alert when a partner has one or more documents that need acknowledgment, Trading Grid Online automatically notifies this contact. If you later delete the contact, Trading Grid Online automatically deletes the contact from the **Arrival notification list**.

- 5 Enter the **Email Address** for the contact. If the address is for a pager, select **This is a Pager address**.
- 6 Click **Submit**.
 The Service Contact Request Complete page opens.
- 7 Click the **Return to Service Contacts List** link.
 The new contact displays in the list on the Service Contact page.



Re-Assign a Default Contact

Important: You must designate one default contact who receives notifications for service messages and outages. Initially, Trading Grid Online assigns the Technical Contact from your Company Profile as the default contact.

To re-assign the default contact

- 1 On the Account Manager tab, click **Service Configuration > Service Contacts**.
- 2 Select the contact you want to make the default contact, and click **Actions > Set as Default Contact**.

Trading Grid Online reassigns the default contact from the previous person to the one specified.

Remove a Default Contact

Important: Only one contact is the default contact.

To remove a default contact

To delete a contact that has the default role, first assign a new default contact, and delete the previous default contact.

View, Change, or Delete a Contact

To view, change, or modify a contact

1 On the Account Manager tab, click **Service Configuration > Service Contacts**.

2 Select the contact you want to view, modify, or delete.

Important: To delete a default contact, you must first assign a new default contact; see ["To re-assign the default contact" on page 347](#).

3 Perform the appropriate action:

To . . .	Do this
Delete the contact	Click Actions , and click Delete .
View or modify the contact	<ol style="list-style-type: none"> 1 Click Actions, and click View/Modify. The Modify New Service Contact page opens. 2 Change the contact's information. 3 (Optional) Change the Contact Type(s), or which contacts should receive notification(s) in addition to service messages and outages. 4 Based on your service subscription, you might not see all the following options: <ul style="list-style-type: none"> ■ Arrival — "Whenever a document interchange arrives in your mailbox" rule. ■ FA Delinquency — "Whenever a Trading Partner has a delinquent FA" rule. ■ Incoming Document — "Whenever a new document arrives in your Document Inbox" rule. ■ Incoming File — "Whenever a new file arrives in your File Inbox" rule. ■ Mailbox Inactivity — "Whenever a mailbox is inactive" rule. ■ Mailbox Outbound Error — "Whenever a mailbox processing error occurs on an outbound interchange" rule. <p>Note: When you select an option for the contact, Trading Grid Online automatically adds the contact to the notification list for that alert in Event Management. For example, if you previously subscribed to and select the FA Delinquency for this contact, and in Event Management you define a rule to generate an alert when a partner has one or more documents that need acknowledgment, Trading Grid Online automatically notifies this contact. If you later delete the contact, Trading Grid Online automatically deletes the contact from the FA Delinquency notification list.</p>

4 Click **Submit**.

Messaging Service Alerts and Options

Trading Grid Online lets you define the rules and policies to determine when trading partners are compliant or non-compliant based on these rules and policies. Compliance or non-compliance is reported in the **Reports** component under **Functional Acknowledgement Management** and **Transaction Alerts**.

Important: Whether or not you see these alerts or options depends on if your company has subscribed to the optional alert services (extra fee might apply). If in doubt, check with your OpenText sales representative.

For each customer mailbox, you can set up one or more of the following:

- **Business Calendar option** — The days the customer considers “working” or “business” days for each of your EDI mailboxes.
- **Arrival Alert** — When a document is placed in the mailbox, Trading Grid Online sends the customer a message. You can request the alert for specific document types, specific trading partners, or both. You can also route the alert to different individuals within the customer company based on document type or trading partner or both. This is useful for a user that checks his/her mailbox infrequently but wants to respond to orders from key clients as soon as possible.
- **Mailbox Outbound Error Alert** — If the customer sends a document to Trading Grid Online Messaging Service and it fails to process, Trading Grid Online alerts the customer. This enables the customer to correct the problem immediately.
- **Mailbox Inactivity Alert** — If the customer does not receive documents in the mailbox according to a schedule that you define, Trading Grid Online alerts the customer, allowing him to determine if a problem exists.
- **Mail Slots option** — Mail slots separate documents you receive according to business process needs.
- **Password Policy** — You can impose a more restrictive password policy than what the customer has defined.

Important: In order for the alerts to function properly, you must configure **all** alerts the customer subscribes to.

Topics include:

- [“Define the Alerts” on page 349](#)
- [“FAM Alerts and Report Options” on page 358](#)

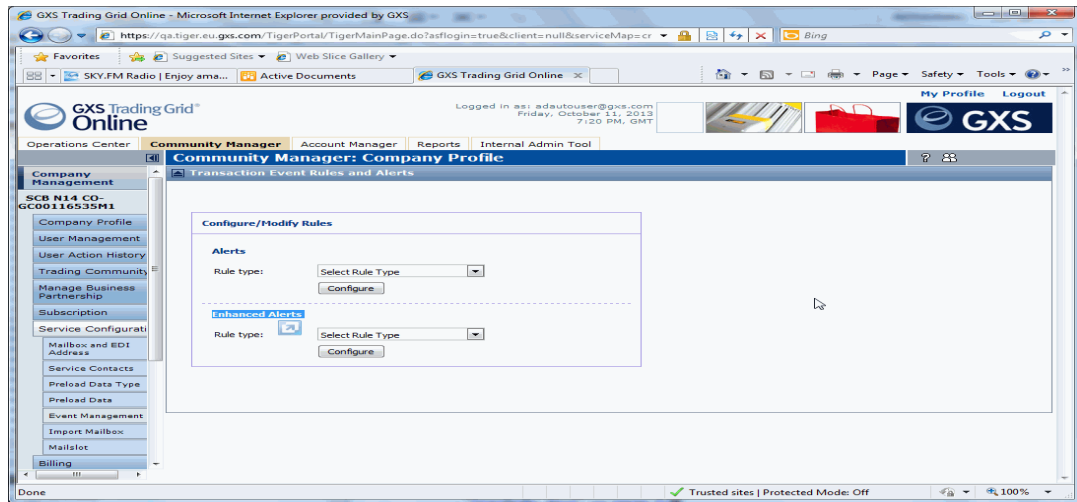
Define the Alerts

Important: For alerts to function properly, you must configure **all** alerts you subscribed the customer to. Based on your subscription, you might need to configure all or some of alerts.

To define customer alerts

- 1 On the Account Manager tab, click the applicable **Customer Company Name**.
- 2 On the Company Profile page, click **Service Configuration**.
- 3 On the left side of the Service Configuration page, click **Event Management**.

The Transaction Event and Rules and Alerts page opens.



From here you can define:

- "Business Calendar" on page 350
- "Inactivity Alert" on page 352
- "Arrival Alert" on page 354
- "Mailbox Error Alert" on page 356

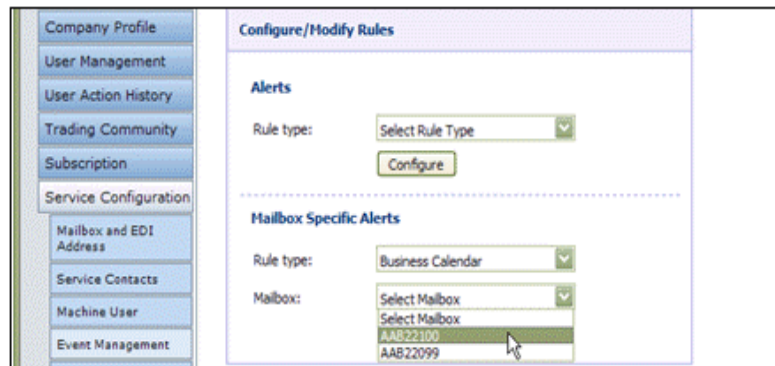
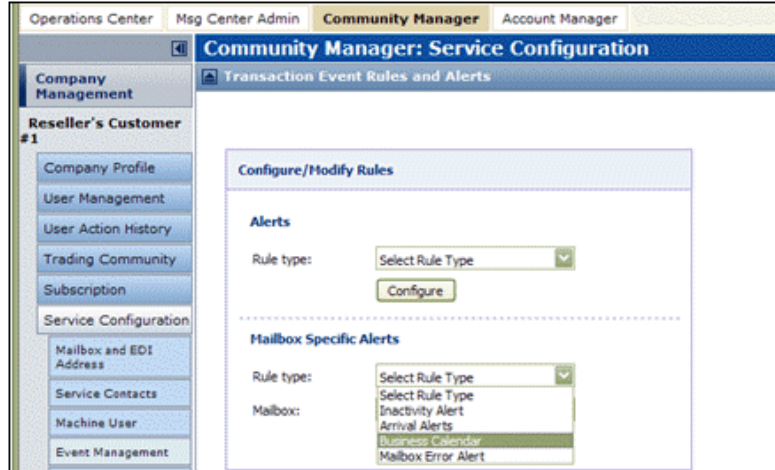
Business Calendar

Note: Business Calendar applies only to Inactivity Alerts. If you are not defining an Inactivity Alert, go to "Arrival Alert" on page 354 or "Mailbox Error Alert" on page 356.

To define the Business Calendar

- 1 Open the Transaction Event and Rules and Alerts page. See "Define the Alerts" on page 349.
- 2 In the **Mailbox Specific Alerts** section, for **Rule type** select **Business Calendar**.

3 Select the **Mailbox** to apply the calendar to, then click **Configure**.



- 4 On the Business Calendar page enter the following.
- **Working Days** — Days to consider as “working” or “business” days. Inactivity alerts process Working Days only.
 - **Time Zone** — Select the time zone for your community.
 - **Daylight saving time observed** — Select this if your community observes Daylight Savings Time.

- **Holidays** — Days Trading Grid Online should ignore as non-Working Days. Use any days, not only holidays. Click the calendar icon to select each holiday date.

- 5 Click **Save**.
- Repeat these steps for each mailbox.

Inactivity Alert

To create an inactivity alert

- 1 Open the Transaction Event and Rules and Alerts page. See [“Define the Alerts” on page 349](#).
- 2 In the **Mailbox Specific Alerts** section, enter the following information.
 - a From the **Rule type** drop-down list, select **Inactivity Alert**.
 - b From the **Mailbox** drop-down list, select the mailbox to which this rule should apply, then click **Configure**.

The Mailbox Inactivity Alert page opens.

- 3 Make sure the **Enable Event Rule** option is selected.
- 4 Enter the following information.

Field	Description
Apply the Business Calendar	Select this check box to have mailbox inactivity measured only during working hours on working day, excluding holidays, as defined in the “Business Calendar” on page 350. Otherwise, mailbox inactivity is measured 7 days a week.
The Range for Receiving Alerts	
Start Time	Enter the start time for receiving alerts.
Stop Time	Enter the stop time for receiving alerts.
Time Zone	Displays the time zone previously defined.
Mailbox Inactivity Alert Details	

Field	Description
Inactivity Length	Enter the number of hours the mailbox is inactive before Trading Grid Online generates a notification.
Notify Contact	<p>These are the customer's contacts previously defined in the Service Contacts list. See "Define Service Contacts" on page 345. Do any of the following:</p> <ul style="list-style-type: none"> ■ To have the default contact receive the alert, click the Default Contact check box. To display the contact information, click the Default Contact link. ■ To have the contacts, previously designated as contact for this alert, receive the alert, click the Mailbox Inactivity Contact(s) check box. To display the contact information, click the Mailbox Inactivity Contact(s) link. ■ To have someone else receive the alert, click the Other Contacts check box then click Modify List. A list of all your service contacts displays. Select a contact from the list, then click Submit. <p>If a contact does not display in the list, you must define that contact. See "Define Service Contacts" on page 345. To remove a contact from the Other Contacts list:</p> <ol style="list-style-type: none"> 1 Click the Other Contacts check box > Modify List. The list of service contacts displays. 2 Deselect the contact from the list, and then click Submit.

5 Click **Save**.

6 Repeat these steps for each mailbox.

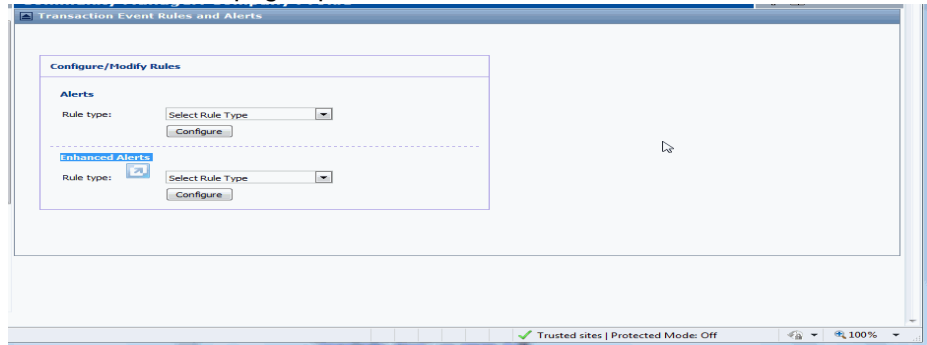
Arrival Alert

Use this procedure to create an arrival alert.

To create an arrival alert

- 1 Open the Transaction Event and Rules and Alerts page. See ["Define the Alerts" on page 349](#).
- 2 In the **Mailbox Specific Alerts** section, enter the following information.
 - a From the **Rule type** drop-down list, select **Arrival Alerts**.
 - b From the **Mailbox** drop-down list, select the mailbox to which this rule should apply, then click **Configure**.
- 3 Do one of the following:
 - Click **Add Arrival Alert**
 - Click **Actions** > **Add Rule**.

The Add Arrival Alert page opens.



- 4 Make sure the **Enable Event Rule** option is selected.
- 5 Enter the following information.

Field	Describe
Document Type	<p>Select a Document Type for the rule.</p> <ol style="list-style-type: none"> 1 Click Browse. 2 Find the document type, then click the Select check box. The selected value displays in Document Type field.
Partner EDI Address	<p>Enter the partner's EDI address.</p> <ol style="list-style-type: none"> 1 Click Search by Company. 2 Do one of the following: <ul style="list-style-type: none"> ■ Type a partial or complete name in the pop-up then click Search. ■ Leave the field blank then click Search to view a listing of all companies. 3 Click Select. 4 Select the company name and an address. The selected value displays in Partner EDI Address field.

Field	Describe
Your EDI Address	<p>Enter your EDI address.</p> <ol style="list-style-type: none"> 1 Click Browse. 2 Find the address this rule to, then click the Select check box. 3 Click Select. <p>The selected value displays in Your EDI Address field.</p>
Notify Contact	<p>These are the customer's contacts previously defined in the Service Contacts list. See "Define Service Contacts" on page 345. Do any of the following:</p> <ul style="list-style-type: none"> ■ To have the default contact receive the alert, click the Default Contact check box. To display the contact information, click the Default Contact link. ■ To have the contacts, previously designated as contact for this alert, receive the alert, click the Arrival Alerts Contact(s) check box. To display the contact information, click the Arrival Alerts Contact(s) link. ■ To have someone else receive the alert, click the Other Contacts check box then click Modify List. A list of all your service contacts displays. Select a contact from the list, then click Submit. ■ If a contact does not display in the list, you must define that contact. See "Define Service Contacts" on page 345. <p>To remove a contact from the Other Contacts list:</p> <ol style="list-style-type: none"> 1 Click the Other Contacts check box > Modify List. The list of service contacts displays. 2 Deselect the contact from the list, and then click Submit.

- 6 Click **Submit**.
- 7 Repeat these steps for each mailbox.

Mailbox Error Alert

To create a mailbox error alert

- 1 Open the Transaction Event and Rules and Alerts page. See ["Define the Alerts" on page 349](#).
- 2 In the **Mailbox Specific Alerts** section, enter the following information.
 - a From the **Rule type** drop-down list, select **Error Alert**.
 - b From the **Mailbox** drop-down list, select the mailbox to which this rule should apply, then click **Configure**.

The Mailbox Outbound Error Alert page opens.

- 3 On the Mailbox Outbound Error Alert page, check the **Enable this Event Rule** checkbox.

- 4 Enter the following.

Field	Description
Notify Contact	<p>These are the customer's contacts previously defined in the Service Contacts list. See "Define Service Contacts" on page 345. Do any of the following:</p> <ul style="list-style-type: none"> ■ To have the default contact receive the alert, click the Default Contact check box. To display the contact information, click the Default Contact link. ■ To have the contacts, previously designated as contact for this alert, receive the alert, click the Mailbox Outbound Error Contact(s) check box. To display the contact information, click the Mailbox Outbound Error Contact(s) link. ■ To have someone else receive the alert, click the Other Contacts check box then click Modify List. A list of all your service contacts displays. Select a contact from the list, then click Submit. ■ If a contact does not display in the list, you must define that contact. See "Define Service Contacts" on page 345. <p>To remove a contact from the Other Contacts list:</p> <ol style="list-style-type: none"> 1 Click the Other Contacts check box > Modify List. The list of service contacts displays. 2 Deselect the contact from the list, and then click Submit.

- 5 Click **Submit**.
- 6 Repeat these steps for each mailbox.

FAM Alerts and Report Options

The Functional Acknowledgement Management (FAM) service provides you with a series of reports and generates notifications for delinquent FAs.

Important: For each mailbox, you must define the conditions under Trading Grid Online should generate an email notification and report data.

Topics include:

- ["Define or Modify a Rule" on page 358](#)
- ["Enable a Specific Rule" on page 359](#)
- ["Disable \(but Do Not Delete\) a Specific Rule" on page 359](#)
- ["Enable/Disable All Rules" on page 360](#)
- ["Delete a Rule" on page 360](#)

Define or Modify a Rule

To define or change a rule

- 1 Click **Service Configuration**.
 - 2 In the section that expands, click **Event Management**.
 - 3 On the Transaction Events Rules and Alerts page, in the **Rule Type** dropdown, select **FA Delinquency**, and in the **Mailbox** dropdown, select your first mailbox.
 - 4 Click the **Configure** link.
 - 5 On the Functional Acknowledgement Rules page, do one of the following:
 - To add a new rule, click **Add Rule**.
 - To modify a rule, select the rule, click **Actions > Modify**.
- Important:** Make sure the **Enable this Event Rule** option is selected. If it is not, you cannot add or modify rule data.
- 6 In the **Tracking Type** section, select either
 - **Included for Tracking** — Default. Usually select this option. It includes all transactions that meet the rule conditions.
 - **Excluded for Tracking** — Select this to exclude from notifications and reports the transactions that meet the conditions in this rule. With this option, you cannot enter any Tracking Policy conditions because they do not apply.
 - 7 (Optional) Enter data in the **Rule Conditions** section. To select a specific **Document Type** for the rule, click **Browse**, find the type, and double-click it. You can search and select EDI addresses. If you select a **Partner EDI Address**, Trading Grid Online automatically populates the **Trading Partner** field.
 - 8 In the **Tracking Policy** section, you can select these options:
 - **Apply the Business Calendar** — Select this option to apply the rule on "working days" as defined in your Business Calendar.
 - **Functional Acknowledgement address must match original transaction address** — Select this option to exactly match addresses between the FA and original transaction.

- 9 Define the **Delinquency Policy** for this rule as follows:
 - **Time to Delinquency** — Number of hours after receipt that the Trading Partner must acknowledge all documents or document groups.
 - **Notify Contact** — Specify who to notify.
 - Note:** These are contacts in your Service Contacts list.
 - For the **Default Contact** to receive the alert, click the check box. Click the **Default Contact** link to see contact information.
 - For the designated **Alert Contact(s)** to receive the alert, click the check box. Click the **Alert Contacts** link to see contact information.
 - For someone else to receive the alert, select the **Other** check box, then click **Modify List**. A list of all your service contacts displays. Select a contact, then click **Submit**.
 - To remove a contact from this list, click **Modify List**. Deselect the contact, then click **Submit**.
 - If you do not see the contact you want, define that contact using the “[Service Contacts](#)” procedures.
- 10 **Notify Trading Partner Contact** — Select this option for Trading Grid Online to send a notification to the Trading Partner.
- 11 Define the **Escalation 1** policy, that is, the action to take when the **Time to Delinquency** expires. **Time for Delinquency** is the number of hours the Trading Partner has to acknowledge the document(s) before Trading Grid Online again escalates it.
- 12 Specify the contacts to notify for this escalation.
- 13 Define the **Escalation 2** policy, that is, the action to take when the **Escalation 1 Time from Delinquency** expires. This **Time for Delinquency** is the number of hours the Trading Partner has to acknowledge the document(s) before Trading Grid Online escalates it for the final time.
- 14 Specify the contacts to notify for this final escalation.
- 15 Click **Submit**.

Enable a Specific Rule

To enable a rule

- 1 Click **Service Configuration**. In the section that expands, click **Event Management**.
- 2 On the Functional Acknowledgement Rules page, select the rule
 - Note:** Its status must **Disabled**.
- 3 Click **Actions > Modify**.
- 4 Deselect the **Enable this Event Rule** option.
- 5 Click **Actions > Save**.

Disable (but Do Not Delete) a Specific Rule

To disable a rule

- 1 Click **Service Configuration**.

- 2 Click **Event Management**.
- 3 On the Functional Acknowledgement Rules page, select the rule.
Note: Its status must **Enabled**.
- 4 Click **Actions > Modify**.
- 5 Deselect the **Enable this Event Rule** option.
- 6 Click **Actions > Save**.

Enable/Disable All Rules

To enable or disable all rules

- 1 Click **Service Configuration > Event Management**.
- 2 On the Functional Acknowledgement Rules page, in the **Functional Acknowledgement Rules** dropdown, select one of the following:
 - **Turn on all rules to enable all rules**
 - **Turn off all rules to enable all rules**
- 3 Click **OK**. The page redisplayes showing the new status for all rules.

Delete a Rule

To delete a rule

- 1 Click **Service Configuration > Event Management**.
- 2 On the Functional Acknowledgement Rules page, select the rule.
- 3 Click **Actions > Delete**.
- 4 Click **OK**.

Active Document Status Alerts

For outbound transactions, the company administrator can set up email status alerts that indicate key events — such as message receipt, processing, delivery, or extraction by a Trading Partner — associated with files and documents moving through the GXS environment.

Topics include:

- [“Define an alert” on page 360](#)
- [“Active Document Data Policies” on page 362](#)
- [“Customize Key Names/Labels” on page 363](#)

Define an alert

To define an alert

- 1 Click the **Account Manager** tab in Trading Grid Online.
- 2 On the Company Profile page, click **Service Configuration**.
- 3 In the Service Configuration page, click **Event Management**.

The Status Alert Rules page lists alerts and whether or not they are enabled.

4 To create a new alert, click **Create**.

A new page opens.

5 Define the rule parameters.

Field	Description
Rule Name	Enter a descriptive name for the rule.
Enable Rule	Make sure that this box remains checked, or the rule is disabled.
Document Type	If applicable, enter the EDI document type(s) or the APRF for non-EDI or binary files. Optionally, click the adjacent icon to select a document type. Standards currently supported are ANSI X12, EDIFACT, and Tradacoms.
Partner Address My Address	Enter the applicable EDI addresses.
Direction	Specify the transaction direction relative to the address in My Address . Select the type of direction for this rule: <ul style="list-style-type: none"> ■ Sent from this address — Default. Applies to outbound transactions. ■ Received for this address — Applies to inbound transactions.
Do not track Event types/Notifications	Select this option to exclude the Trading Partner from all Status Alert Rules.
Order Notifications [Delivery status file via Global Platform]	Select this option to generate alerts in the order that Event Types are presented in the next step. Alerts are delivered as a file. If you do not select this option, alerts are generated as the events are received, which might or might not be in the order that events are processed.

6 Select the **Event Type** to send an alert for. Event types are:

Event Type	Description
Accepted by GXS	The file/document has been received by GXS from the Trading Partner's system.
Mailboxed by GXS	The Global Platform mailboxed the translation output file for delivery to the Trading Partner.
Processed by GXS	The Global Platform successfully processed the customer application file with a custom script.
Translated by GXS	GXS completed the translation process on the file or document.
Extracted by my Partner	The Trading Partner has extracted the document from the mailbox or the interconnect. This event is available only for transactions that travel through TGMS.
Received by my Partner	The file/document has been delivered to the Trading Partner's destination.

7 Enter occurrence, error, and timing information for the Event Type:

- **Notify when this occurs** — Select to generate an alert when the event is received.
 - **Notify me if there is an error or if this has not occurred . . .** — Select to notify if one of the following occurs.
 - An error.
 - The event has not occurred within a time period after a specific, previous event completed. This is referred as a negative status. Specify the number of minutes, hours, or days, then select the event type that the time period refers to.
- 8 Enter delivery information for the Event Type:
- **Send to service contacts** — Select this to send an email alert to all Service Contacts designated to receive alerts.
 - **Delivery status file via Global Platform** — Select this to send an alert file to the address specified in the **Receiver** field. Optionally, you can select the **Include additional details** option to include more detailed information such as document, functional group, and interchange in the alert file.
- 9 Repeat these steps for each event to include in the rule.
- 10 Click **Save**.

Active Document Data Policies

Active Documents supports policy-based data access restrictions for users. Each company can define data filter policies based on sender and receiver addresses, document types, and other data elements, and assign users to those policies to limit which sets of transaction data they can view and work with in Active Documents.

To define an Active Documents data policy

- 1 Click **Service Configuration > Policy Definition**.
- 2 On the Policy Definition Listing page, click **Create**.
- 3 On the Create Policy Definition page, enter the **Definition Name** and a short **Description**.
- 4 In the **Template Name** dropdown, select the applicable template. The page adds fields.
- 5 Enter the applicable values.

Notes:

- You can enter more than one value in each field.
 - Separate each value with a comma.
 - Do not surround the comma with any leading or following spaces.
- 6 To assign users to see what this policy generates, click the **Assign Users** tab.
 - 7 Click **Save**.

Customize Key Names/Labels

You can define custom labels for your keys, then use the labels to search those keys. Use this procedure to define key names rather than use the predefined names.

Important: Once you define a custom key name, you must define custom key names for ALL of your keys, as you will not see any of the system-predefined key names.

To define a key name

- 1 Click **Service Configuration > Custom Key Names**.
- 2 Click **Add**.
- 3 In the Add New Key page, enter the data.

- **Level** (required) — Select the applicable option:
 - **Document** — Data is transformed into (or from) EDI format.
 - **File** — Data is transformed between two custom data formats.
- **Element Name** (required) — From the drop-down menu, select the applicable element key name to replace.

Note: Existing key names are case-sensitive. Select the correct version of the key name for your data.
- **Custom Key Name** (required) — Enter a unique name to use for this key.
- **Direction** (required) — Select the direction(s) when the custom key name applies.

The remaining fields are optional. You can limit the use of the new custom key name to one of your own addresses, and/or a specific trading partner's address, and/or document type. Click the dropdown to select a value.

- 4 Click **Save**, or to add this key to the list and define a new key, click **Save & New**.

Active Invoice Legal Profiles

If your company subscribes to the Active Invoices with Compliance (AIC) Active Invoices with Compliance (AIC) service, you must define and maintain the applicable legal profile(s), as nearly every country in the world has legislation to regulate electronic invoicing. While these regulations are often similar in purpose, specific requirements can vary by country. For example, data archiving requirements vary between six and eleven years, depending on which countries are involved with the invoice.

You must define a profile for each of your company's entities — that is, each of your divisions, sub-divisions, branches, plants, etc. — in each country where they have a valid Value Added Tax (VAT) or Tax ID number.

For example, a company that with headquarters in the United States, branch offices in Italy, France, and Spain, and manufacturing plants in Brazil and Mexico would need to define six profiles — one for each country.

A legal profile:

- Identifies the default type of input the buyer receives.
- Determines the period of time that invoices are available in the Invoice Archive.
- Provides delivery options, including Secure Email Delivery.
- Specifies contacts that receive email notifications about invoice processing.
- Provides options for suppliers to display a logo and define additional content on invoice input.

Topics include:

- [“Define a Legal Profile” on page 364](#)
- [“Maintain Legal Entity Relationships” on page 375](#)

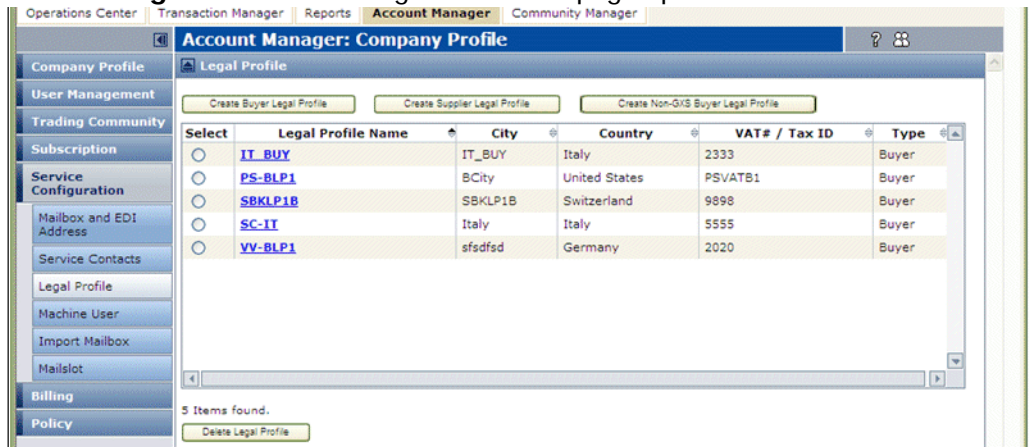
Define a Legal Profile

You can define one or more Legal Entity profiles (sender or receiver) for a Business Unit. A *Legal Entity* is the record of the unique Buyer (receiver) or Supplier (sender) party, typically from a tax registration perspective, that exchanges compliant invoices through AIC. This is a company or a business unit or division within a company.

To define your legal profile(s)

- 1 Login into the GXS Trading Grid Online.
- 2 Click **Account Manager** tab > **Service Configuration**.

3 Click **Legal Profile**. The Legal Profile List page opens.



Note: Depending on if you are a sender or receiver, and who you are creating a Profile for, you might not see all of the following options or steps.

4 On the Legal Profile list page, to modify a legal profile, in the **Legal Profile Name** column, click the profile, then go to the next step.

To create a new legal profile, click one of the following, which depends upon the subscription chosen by your Business Unit.

Create Option	Subscription	Description
Sender (Subscriber) Legal Profile	AIC Sender	Click if your Company is a Supplier Hub, that is, a corporate sell-side organization (Hub), which is proactively planning to push compliant electronic invoices out to its customer community, and your Company is focused on the Accounts Receivable benefits of electronic invoice compliance.
Receiver (Subscriber) Legal Profile	AIC Receiver	Click if your Company is a Buyer Hub, that is, a large corporate buy-side organization (Hub), which is proactively mandating electronic invoice compliance to its Supplier community, and your Company is focused on the Accounts Payable benefits of electronic invoice compliance.
Create Receiver (Non-Subscriber) Legal Profile		Click if your company is a Supplier to a buying company that has requested compliant e-invoices, but the buying company is not using GXS AIC.
Create Sender (Non-Subscriber) Legal Profile		Click if <ul style="list-style-type: none"> ■ Your company is a buying company that has requested compliant e-invoices. ■ The Supplier company is not using GXS AIC. ■ You are using the Non-Sign EDI invoice process type with this Supplier.
Non-GXS Receiver Legal Profile	AIC Sender	Click if you have a trading relationship with Buyer who is not a GXS customer, but uses the AIC service.
Non-GXS Sender Legal Profile	AIC Receiver	Click if you have a trading relationship with Supplier who is not a GXS customer, but uses the AIC service.

The buttons to create legal profile are based on the subscription chosen by the respective Business Unit (BU) / company, as follows.

- **Create Sender (Subscriber) Legal Profile** and **Create Non-GXS Receiver Legal Profile** apply to an AIC Sender subscription.
- **Create Receiver (Subscriber) Legal Profile** and **Create Non-GXS Sender Legal Profile** apply to an AIC Receiver subscription.
- **Create Receiver (Subscriber) Legal Profile, Create Sender (Subscriber) Legal Profile, Create Non-GXS Receiver Legal Profiles,** and **Create Non-GXS Sender Legal Profile** are seen

For creating legal profile for Receivers, click **Create Receiver (Subscriber) Legal Profile**.

- 5 On the Legal Profile as . . . page, enter or modify the data to modify or define the profile. In the **Legal Entity Information** section, enter the required information about the location of the division, plant, or other entity for the profile.

For **Legal Entity Unique ID**, enter a unique combination of letters and/or numbers. A *Legal Entity* is the record of the unique Buyer or Supplier party, typically from a tax registration perspective, that exchanges compliant invoices through AIC. This is a company or a business unit or division within a company.

For example, if Company ABC operates in three European countries and is registered as a unique tax entity all three, it would have three legal entities in AIC.

- 6 Be sure to select the **Country**. The **Country** drop-down menu has 2 sections.

- First the **COMPLIANT** countries are listed. These countries have a set of standards for doing business, as defined by its legal entity.
- Then, the **NON-COMPLIANT** countries are listed. These countries have no specific defined standards.

- 7 In the **Contact Information** section, enter at least one contact.

- 8 To enter one or more of your previously defined Service Contacts:
 - a Click **Select Existing Service Contacts**.
 - b Select the applicable contact(s), then click **Select**.
- 9 To define a new contact:
 - a Enter the data for the first contact. All fields are required. **Locale** refers to the preferred language of the contact, not a country.
 - b Click **Add**. This is required to save the contact.
- 10 Repeat the previous two steps to add additional contacts.

Note: The system assigns a Contact ID to each contact; this is an internal ID for system use only.

Important: If you have only one contact and want to replace it, add the new contact, make it the default contact, then remove the old contact.
- 11 Click **Submit** to save changes. Options display.

Important: GXS strongly recommends that you consult with your GXS Account Manager before selecting the remaining options.
- 12 In the **Signing Information** section, specify the **Process Type**, that is, the output format in which to deliver signed invoices. Based on the **Country** selected, and the type of the Legal Profile, you will not see all of the following options. Select an option.

Process Type Option	Description
Active Invoice Archive	Archives all signed and non-signed invoice documents and related artifacts without any validation checking, duplicate invoice number checking, or invoices sent to a recipient. In the Legal Entity Information section, if you selected a NON-COMPLIANT country , you must select this option.
Active Invoice Archive	Archives all signed and non-signed invoice documents and related artifacts without any validation checking, duplicate invoice number checking, or invoices sent to a recipient.
Active Invoice for Latin America with and without Duplicate Check	Applies to signed invoices in the countries of Mexico , Brazil , and Turkey for invoice processing requiring approval from Tax authorities. This process applies digital signatures to the invoice documents (PDF or any other format). AIC then sends a PDF version of the signed invoice. This process is available with or without the duplicate invoice number check feature for invoice documents; select the applicable option.
Active Invoice Non Sign With Human Readable Image and Signed PDF container	Same as Active Invoice Non-sign with Human Readable Image with a PDF "container" created to sign the invoices and then to send or archive these invoices with their related "artifacts," or data, via PDF file(s).
Active Invoice Non Sign With Human Readable Image and Unsigned PDF container	Same as Active Invoice Non-sign with Human Readable Image with a PDF "container" created to send or archive unsigned invoices with their related "artifacts," or data, via PDF file(s).

Process Type Option	Description
Active Invoice Non-sign with Human Readable Image	Same as Active Invoice Non-signed EDI except that a PDF document (human readable image) of the invoice is generated and sent to the recipient.
Active Invoice Non-sign with Human Readable Image without Duplicate Check	Same as Active Invoice Non-sign with Human Readable Image except that a duplicate invoice number check is not performed on invoice documents.
Active Invoice Non-signed EDI	AIC receives only EDI invoice documents that are not digitally signed. AIC forwards the EDI documents to the recipient after content validation. The duplicate invoice number check feature is also performed on the invoice documents. Duplicate checking ensures that a Sender cannot send multiple invoices with same invoice number within the Sender's fiscal year. AIC also generates: <ul style="list-style-type: none"> ■ Summary List — list of all transactions performed by the customer in a day ■ Trading Partner List — list of trading partners with whom the customer has performed transactions. <p>Note: For non-signed invoices, there is an additional requirement to maintain the Trading Partner List and Summary List. An active relationship between two legal entities (Receiver and Sender) is mandatory for them to exchange invoices; otherwise the invoices are rejected.</p>
Active Invoice Non-signed without Duplicate Check	Same as Active Invoice Non-signed EDI except that the invoice number duplicate check is not performed on invoice documents.
Active Invoice Sign	AIC digitally signs the invoices on behalf of a Sender, provided the Sender is also selected this Process Type . Digital signatures are applied to the invoice (PDF or any other format). AIC then sends a PDF version of the signed invoice.
Active Invoice Sign with Duplicate Check	Same as Active Invoice Sign with an added duplicate invoice number check feature performed on the invoice documents. Duplicate checking ensures that a Sender cannot send multiple invoices with the same invoice number within the Sender's fiscal year.
Active Invoice Sign with Duplicate Check and TP Report List	Same as Active Invoice Sign with TP Report List with an added duplicate invoice number check feature performed on the invoice documents. Duplicate checking ensures that a Sender cannot send multiple invoices with same invoice number within the Sender's fiscal year.
Active Invoice Sign with Signed PDF container	Same as Active Invoice Sign with a PDF "container" created to sign the invoices and then to send or archive these invoices with their related "artifacts," or data, via PDF file(s).
Active Invoice Sign with TP Report List	Same as Active Invoice Sign with an added Legal Entity Relationship check that generates a list of trading partners associated with the Sender.

Process Type Option	Description
Active Invoice Sign with Unsigned PDF container	Same as Active Invoice Sign with a PDF “container” created to send or archive unsigned invoices with their related “artifacts,” or data, via PDF file(s).
Active Invoice Validate	Same as Active Invoice Sign with an added feature that received signed invoice documents are validated for digital signatures.
Active Invoice Validate with Duplicate Check	Same as Active Invoice Validate with an added duplicate invoice number check feature performed on the invoice documents. Duplicate checking ensures that a Sender cannot send multiple invoices with same invoice number within the Sender’s fiscal year.

If you selected **Active Invoice Sign**, the page redisplay.

Digital Signature Information

Domestic

Document Format:

Sign Format:

Job Type:

Cross Border

Document Format:

Sign Format:

Job Type:

Select / Update Digital Signature Information

- a** In the **Digital Signature Information** section, click **Select/Update Digital Signature Information** to enable the Digital Signature Information page for selecting the **Document Format / Sign Format / Job Type** for **Domestic** invoices (sender and receiver are in the same country) or **Cross Border** invoices.

Note: The **Default** combination (**PDF / PDF / CADESA**) is marked with a check mark, but it must be selected to populate the Legal Profile.

Domestic:

Default	Select	Document Format	Sign Format	Job Type
	<input type="radio"/>	CXML	PKCS7	CADESA
	<input type="radio"/>	CXML	PKCS7D	CADESA
	<input type="radio"/>	CXML	SMIME	CADESA
	<input type="radio"/>	CXML	XMLCON	XADESA
	<input type="radio"/>	CXML	XMLSIG	XADESA
	<input type="radio"/>	GENERIC	PKCS7	CADESA
	<input type="radio"/>	GENERIC	PKCS7D	CADESA
	<input type="radio"/>	GENERIC	SMIME	CADESA
✓	<input checked="" type="radio"/>	PDF	PDF	CADESA
	<input type="radio"/>	XML	PKCS7	CADESA
	<input type="radio"/>	XML	PKCS7D	CADESA
	<input type="radio"/>	XML	SMIME	CADESA
	<input type="radio"/>	XML	XMLCON	XADESA
	<input type="radio"/>	XML	XMLSIG	XADESA

Scroll down to the next section to select the combination for **Cross-Border** invoices (sender and receiver are in different countries).

Scroll to the bottom and click **Select** to add your selections.

- b** In the **Signing Information - Exceptions** section, specify Suppliers that should not receive invoices for a specific **Process Type**. The **Legal Entity Unique ID** displays the first Supplier that you do not want to receive invoices in the selected **Process Type**.

For example, if a Sender (trading partner) selected the **Active Invoice Sign** process type and the Receiver selected the **Active Invoice Non Signed** process type, the Receiver can create an exception for the Sender by specifying the **Sender Legal Entity Unique ID** (VAT / TAX Id) and then selecting the preferred process type.

Signing Information - Exceptions

Supplier Legal Entity Unique Id : Process Type : Active Invoice Sign PDF

In the **Process Type Documents Information Archive** section, from the a list of documents relevant for the selected *exceptions Process Type*, select document types from the list. Press the **Ctrl** key to make multiple selections.

Process Type Documents Information Archive

Process Type	Archive Documents
Active Invoice Sign	<ul style="list-style-type: none"> Digitally Signed Document Audit Trail File Digital Signature Evidence/Detached Signature (As applicable) Tax Exempt Document File Invoice Image Copy Buyer File

Click **Add**. You might need to scroll to the right to see the button.

Repeat for each Supplier to make an exception for.

Note: The document selections apply to all Suppliers named in the **Process Type**. To select other documents, use a different **Process Type**.

- c** Use the **Process Type Documents Information Delivery** section in the same way as the previous step.

- d The **Archive Information** section displays the **Default Archive Period** for the country in which this entity is located. .

Archive Information

Disable archiving?

GXS Archive

Default Archive Period : 72 month(s)

Extend to : no. of month(s)

Cloud Profile Id :

Customer Archive

*** Cloud Profile Id :**

Notification Type

Invoice Copy :

To disable invoice reports archiving, select **Disable Archiving?**

Important: This option prevents viewing invoices.

If you do not disable archiving, do one of the following.

- Select **GXS Archive** as your archive. The **Default Archive Period**, is based on the country of this profile. You can use the **Extend to** option to extend this period for each invoice by a number of months. Enter your **Cloud Profile Id**, which is your Cloud Archive Service (TG-CAS) identification. If you want a URL link to access the archived files, select the **Archive Link** option, and then select a **Delivery Mode** of **Email** or **GXS Supported Communication Methods** in Step 14.
- Select **Customer Archive** and enter your **Cloud Profile Id**.

- 13 In the **Notification Type** section, select the alerts and documents to deliver to the Contacts defined in this profile.

Invoice Copy :	<input type="checkbox"/>
Success Alerts :	<input type="checkbox"/>
Error Alerts :	<input type="checkbox"/>

Select as needed:

- **Invoice Copy** to deliver a copy of the unsigned invoice.
- **Success Alerts** (Suppliers only) to deliver a "success" email after the invoice is successfully sent.
- **Error Alerts** (Suppliers only) to deliver an "error" email if an error occurred and the system could not deliver the invoice.

- 14** In the document **Delivery Mode** section, for delivery of AIC-generated documents (not yet archived) to the service contact (default contact in case of a signed/validated document).

Note: The **Delivery Mode** is applicable only if your company subscribed to the **Deliver compliance package**.

Select one:

- **Email** to deliver the documents via email attachments. The maximum number of document attachments delivered is 10 per email.
- **GXS Supported Communication Methods** to use GXS-supported communication methods in which the compliant invoice package is delivered to the TGMS mailbox from where GXS can forward it to the customer using any GXS-supported communication method, e.g., AS2, FTP, etc.
- **Secure Email Delivery** to deliver the documents via a secure link in an email. For more information, see "[Secure Email Delivery](#)" on page 373.
- **Web Services** to deliver the documents to **Spain** or to the **Italian** Government. This applies to **Non-GXS Receivers** only.

For signed invoices, documents delivered are:

- Signed/validated PDF documents.
- Invoice copies, if selected in the **Notification Type** section (previous step).

For Non-signed EDI invoices, the Summary List is delivered.

- 15** For the document delivery **Type**, select either:

- **Real Time Delivery** to archive and deliver invoice-related documents when they are generated.
- **Delayed Delivery** to archive and deliver invoice-related documents after all artifacts (for example, audit trail, summary, etc.) are generated.

Then, you can select:

- **Suppress invoice data delivery . . . ?** to suppress delivery of the original file (submitted by the Supplier) to the Buyer mailbox.
- **Deliver Compliance Package** to deliver all of your documents related to an invoice. The default for this option is **Delayed Delivery**, which submits the compliance packages once per day.
- **Submit compliance package as zip** to deliver the artifacts as one package in zip format.

- 16** (Suppliers only). In the **Human Readable Format** section, you can specify that a logo or additional information display on invoices sent or received.

- a** In the **Locale** dropdown, select the language of the logo or user-defined field.

- b To specify a logo, enter the name of the logo file or click **Browse** to find and select it. It cannot be larger than 10 megabytes.
 - c Click **Upload**. The page redisplay shows the logo. You might need to scroll down to see it.
- 17** (Suppliers only). To specify additional fields to appear on invoices, in the **User Defined Fields** section,
- a Enter the **Field Label** and **Description**. Both are required.
 - b Click **Add** to save the information. The page redisplay shows the field you entered. You might need to scroll down to see it.
 - c Repeat to add additional user fields.
- 18** Click **Submit**. Your profile displays on the Legal Profile list page.
 See also “Maintain Legal Entity Relationships”

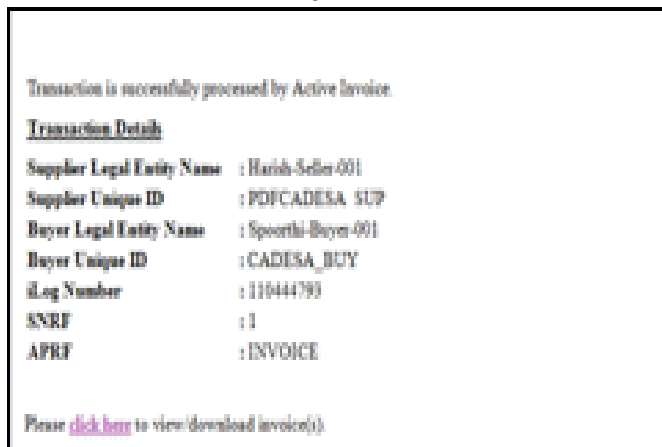
Secure Email Delivery

The Secure Email Delivery option delivers the documents by a secure link in an email sent to the person designated in the Legal Profile. The recipient downloads the documents to the Active Invoice Archive.

Important: Documents received by Secure Email Delivery are retained for 180 days only.

The process is:

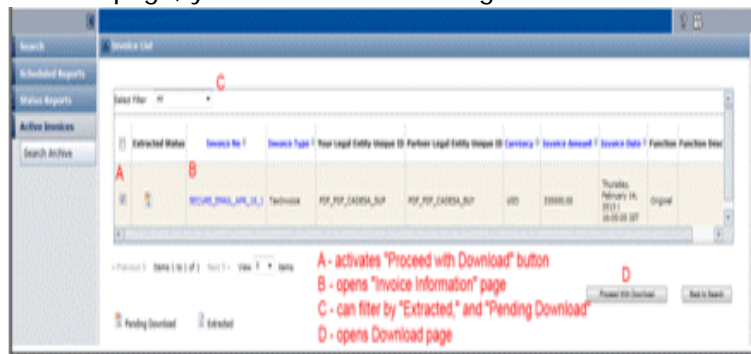
- 1 The Secure Email Delivery contact receives the secure email.



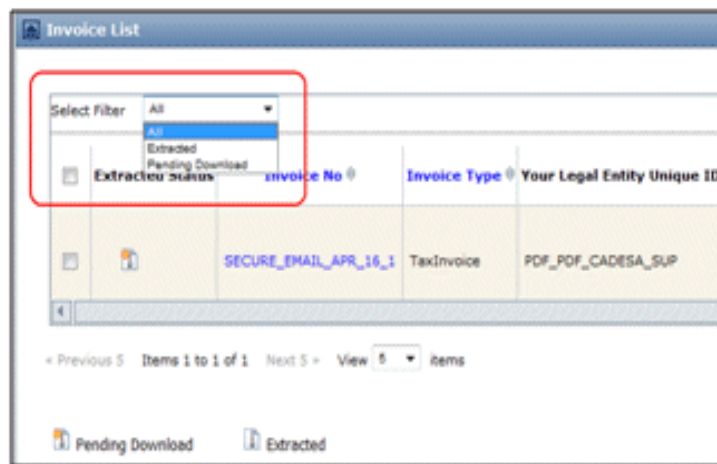
- 2 The email recipient clicks the **click here** link in the email. If the user is already logged into Active Invoices, the Invoice List displays the Secure Delivered documents.



3 From this page, you can do the following:



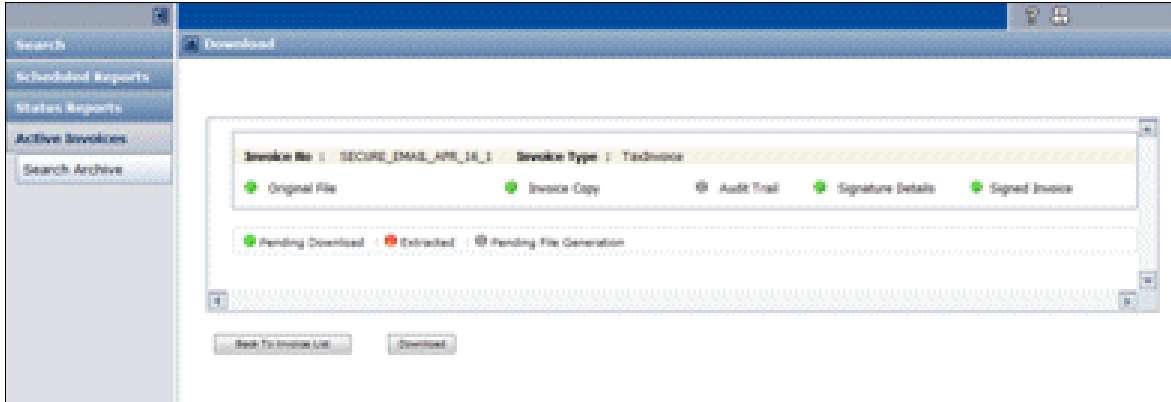
■ Filter the listing.



■ Open the Invoice Information page for the document. †



- Download the invoice.



Maintain Legal Entity Relationships

Important: This applies to Non-Signed EDI Invoice Trading Partners only.

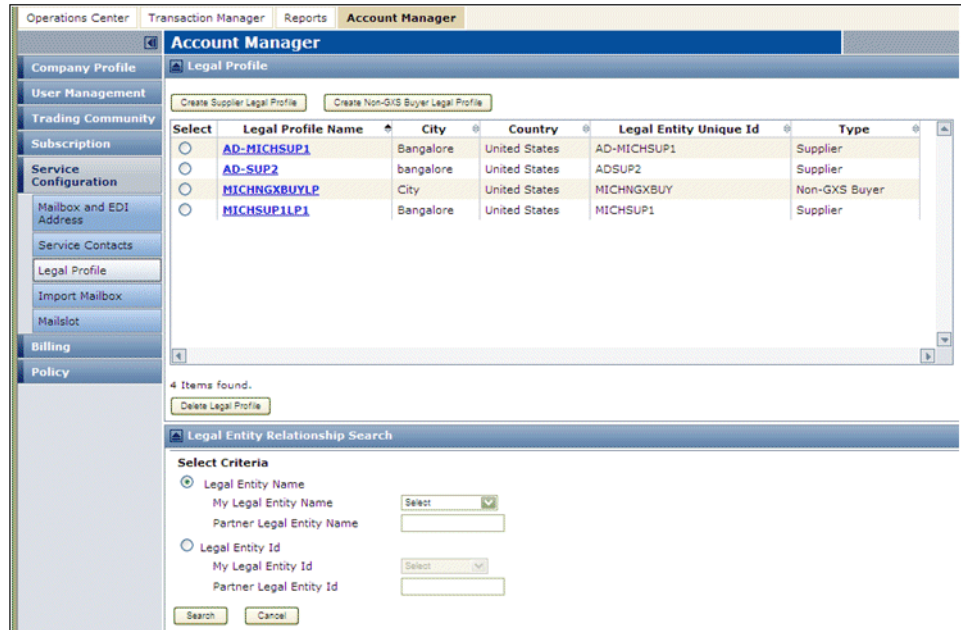
Every Company that sends or receives Non-Signed EDI Invoices must maintain a file of Trading Partners with which the invoices are exchanged in order to log and track Trading Partner changes. The AIC search function lets you quickly find an associated Trading Partner's legal entity profile to:

- View — for example, to see if status or address information has changed.
- Update by entering an end date to terminate the E-Invoicing agreement with that Trading Partner. Terminated entity relationships remain accessible for three years past the end date.

To find and view or update a Legal Entity Relationship

- 1 Log into Trading Grid Online.
- 2 Click the Account Manager tab.

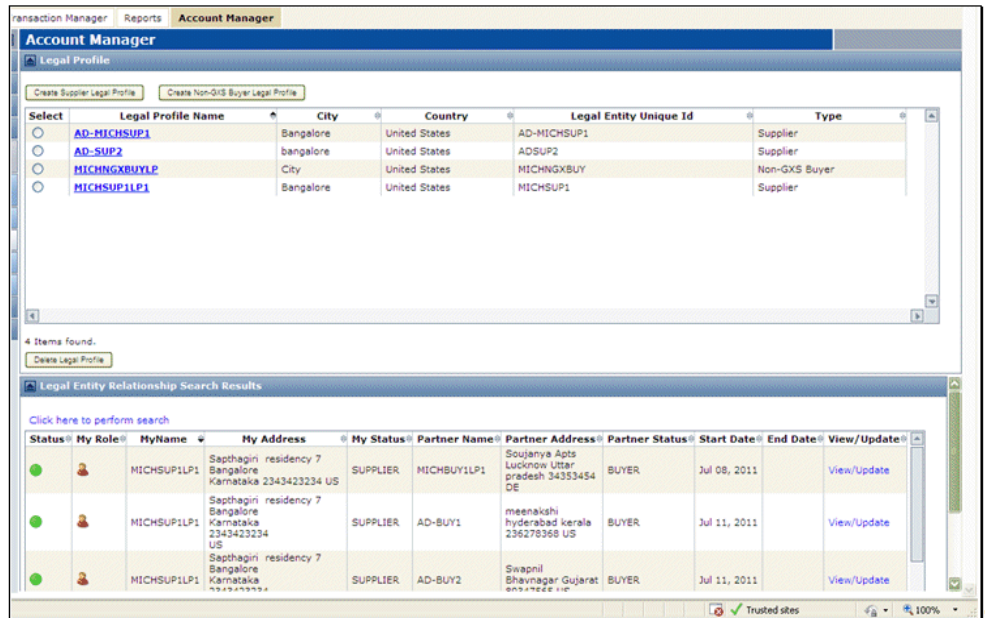
3 Click **Service Configuration > Legal Profile**. The Legal Profile page opens.



4 In the **Legal Entity Relationship Search** section, for the **My Legal Entity Name** or **My Legal Entity ID**, select the entity associated with the Trading Partner(s) to view or update.

If you are looking for a specific Trading Partner, enter that Trading Partner's **Legal Entity Name** or **Legal Entity ID**.

5 Click **Search**. On the Modify Document page your document form displays the Legal Entity Relationship Search Results.



6 To view or update Trading Partner information, in the rightmost column of the list, click the partner's **View/Update** link.

- On the Update Legal Entity Relationship page, view the information or, to terminate the e-invoicing the agreement with that partner, enter the **End Date**.

Note: The **End Date** must be at least 1 day prior to the current date.

Account Manager		
Update Legal Entity Relationship		
My Legal Entity Unique ID:	MICHSUP1	
My Legal Entity Name:	MICHSUP1LP1	
My Role:	SUPPLIER	
Partner Legal Entity Unique ID:	MICHBUY1	
Partner Legal Entity Name:	MICHBUY1LP1	
Partner Role:	BUYER	
Legal Entity Relationship Status:	APPROVED	
Start Date:	07 / 08 / 2011	
End Date:	[] / [] / []	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

Machine Users

Machine user accounts are specialized accounts that allow machine-to-machine communications for some GXS connectivity options. Unlike a personal user account, a machine user account does not require information such as an email address or physical mailing address. Machine user accounts are not required for all GXS connectivity options; if no accounts are displayed, then your current connection method does not require one.

Topics include:

- ["Add a Machine User" on page 377](#)
- ["Update or View a Machine User" on page 378](#)
- ["Activate or Deactivate a Machine User" on page 378](#)

Add a Machine User

To add a machine user

- On the Account Manager tab, click **Service Configuration > Machine User**.
The Machine User page opens.
- Click **Actions**, and click **New Machine User**.
The Step 1: Machine User **Create** Information page opens.
- Enter the required information, and click **Next Step**.
The Step 2: Service Privileges page opens.
- Select the **Service Instance(s)** (subscription package and privileges) for each Service Instance you want the user to have. By default, all options are selected.
- Select the **Role** of the new user, and click **Next Step**.
The Step 3: Review page opens.

- 6 Review your information. To make any changes, click **Previous Step**.
- 7 Click **Submit**.

Update or View a Machine User

To update or view data for a specific account

- 1 On the Account Manager tab, click **Service Configuration > Machine User**.
The Machine User page opens.
- 2 Select the account you want to view.
- 3 Click **Actions > Update**.

Activate or Deactivate a Machine User

To activate or deactivate a specific account

- 1 On the Account Manager tab, click **Service Configuration > Machine User**.
The Machine User page opens.
- 2 Select the account you want to view.
- 3 Click **Actions**; then select **Activate** or **Deactivate**.

Mailboxes and Mailslots

A mailbox is an electronic storage place provided by OpenText, which allows you to exchange data, email, and reports with Trading Partners. Each user is assigned a unique mailbox. You can then add and set up individual mailbox slots to categorize the information you receive, for example, by Trading Partner or document type.

Example:

Mail Slot	Typical Use	Category/Description
Mail Slot 1	Invoices from all standard Suppliers.	These invoices get standard handling.
Mail Slot 2	Invoices from DSD Suppliers.	These invoices get priority handling.
Mail Slot 3	Invoices from Suppliers A and B.	These invoices are paid via EFT.

To add and set up mail slots for your company

- 1 On the Account Manager tab, click **Service Configuration > Mailslots**.
- 2 Click **Create Mailslot**.
The Create Mailslot page opens.

3 Enter the **Mailslot Name** and **Description**. The text you enter should describe the purpose of the mail slot.

The screenshot shows the 'Account Manager: Service Configuration' window with the 'Create Mailslot' form. The left sidebar contains navigation options: Company Profile, User Management, Trading Community, Subscription, Service Configuration (selected), Mailbox and EDI Address, Service Contacts, Machine User, Event Management, Import Mailbox, Mailslot, Billing, and Policy. The main form area is titled 'Create Mailslot' and includes the following sections:

- Form Fields:**
 - * Mailslot Name: [Text Input]
 - * Description: [Text Input] (Max. 200 Char)
 - * Mailbox: [Dropdown Menu] (Selected: ADW13783)
 - * My EDI Address: [Text Input] with a search icon (Q)
 - * Document Type: [Text Input] (Selected: ANY) with a search icon (Q)
 - * Partner EDI Address: [Radio Button] [Text Input] (Qualifier):(ID)
 - [Radio Button] [Text Input] (Qualifier):(ID)
- Rule Definition:**
 - [Add] button
 - [CSV] button
 - [No Item found.] message
- Associate Users:**
 - * User: [Dropdown Menu] (Selected: Select User)
 - [Add] button
 - [No Item found.] message

4 In the **Rule Definition** section:

- For the **My EDI Address** and **Document Type** fields, click the adjacent **Search** icon to find and select the applicable values, and click **Submit**.
- For the **Partner EDI Address(es)**, enter the address for the first trading partner, and click **Add**.
The address displays.
- Repeat this step for each trading partner.

5 In the **Associate Users** section:

- Select the Company employee(s) that handle the documents in this mailslot.
- From the **User** drop-down list, select the first user, and click **Add**.
The employee's name displays.
- Repeat this step for each trading partner.

6 Click **Submit**.

Cross-Reference Tables

Cross-reference tables are comma-delimited (.csv) files that identify fields with specific values in EDI documents. OpenText Professional Services uploads these tables to Trading Grid Online to replace and validate document information during the transformation process.

You can update values in the tables, add or delete rows, and revert to previous versions of a table. To further edit a table, you can download and then open it in another application such as Microsoft Excel.

Topics include:

- ["File Format Guidelines" on page 380](#)
- ["Update values in a cross reference table" on page 2](#)
- ["Add or Delete Rows in Cross-Reference Tables" on page 381](#)
- ["Download Cross Reference Table as .csv Files" on page 382](#)
- ["Upload Cross Reference Tables" on page 382](#)
- ["Revert Cross Reference Table To Previous Versions" on page 383](#)

File Format Guidelines

The information in a .csv file to adhere to the following guidelines:

File Name

The name of the .csv file must be in the following format:

<table_name>.csv.

Table Cell Structure

The first cell in the table must be the table name in the following format:

<table_name>.csv)

The other cells in the first row must be the header values for the table. The values in the first column cannot be changed from Trading Grid Online.

Delimiters

Use the comma (,) character as the column delimiter.

Use the double quote (") character as the text delimiter.

Important: OpenText recommends that you do not use a comma or double-quote characters in the original table cell values, and do not add them in the text you modify. If you must include a comma inside a cell, enclose the string with double quotes in the input file.

Use a UNIX-style end of row delimiters (LF or Hex 0A).

Characters

Use the UTF-8 character set, which most Web pages support.

Currency characters, such as pound (£), yen (¥), and euro (€) can be included in cross reference tables. They are in the UTF-8 character set.

Each cell has a character limit of 4000 characters. If more than 4000 characters are used, the system truncates your input.

Example Format

The example below includes the table name in the first column of the first row. The remaining columns in the first row serve as headers in the .csv file and in Trading Grid Online:

Supplier Lookup,WholeSeller Name,Mailing Address Street,City,State,Addition Info
 AX,BAXTER RAW MATERIAL,123 Central Ave.,Kansas City,Kansas,
 CD,"Daltex Contractors, LLC ",225 White's Circle,Prosper,Texas,75078
 MD,Southwest Supply,453 New-South Street,West Memphis,Arkansas,75126

Account Manager: Cross Reference Tables					
Cross Reference Table Summary					
Cross Reference Table Details for Supplier Lookup in Solution ID TGTSXREF.COM.01					
Search all fields: <input type="text" value="Enter keyword"/>					
(1 of 1) <input type="text" value="1"/> <input type="text" value="10"/>					
Supplier Lookup	WholeSeller Name	Mailing Address Street	City	State	Addition Info
AX	BAXTER RAW MATERIAL	123 Central Ave.	Kansas City	Kansas	
CD	Daltex Contractors, LLC	225 White's Circle	Prosper	Texas	75078
MD	Southwest Supply	453 New-South Street	West Memphis	Arkansas	75126

Update Cross-Reference Table Values

To update values in a cross-reference table

- 1 On the Account Manager tab, click **Service Configuration > Cross Reference Tables**.
- 2 Click the link for the table you want to update, and find the table cell you want to update.
- 3 Click in the cell.
- 4 Type the new value.
- 5 Click outside the cell.
- 6 Click **Save**.

Add or Delete Rows in Cross-Reference Tables

To add or delete rows in a cross-reference table

- 1 On the Account Manager tab, click **Service Configuration > Cross Reference Tables**.
- 2 Click the link for the table you want to update, and find the place in the table where you want to add or delete a row.
- 3 Right-click in a table cell, and select one of the following options:
 - **Add Row Above**
 - **Add Row Below**
 - **Delete Row**

4 Perform the appropriate action:

If you selected...	Do this:
Add Row Above Add Row Below	<ol style="list-style-type: none"> 1 In the new row, add values in each column. 2 Click outside the cell. 3 Click Save.
Delete Row	<p>The row is deleted.</p> <ul style="list-style-type: none"> ■ Click Save.

- 5 To deploy your updates, click **Deploy**.
- 6 At the confirmation message, click **Yes**.
- 7 To verify deployment has finished, click **+** to open the bottom of the page.
- 8 Click **Refresh**, and verify the time of the update. Click **Show** to view additional information about the change.
- 9 To get a refreshed view of the tables, press **Cross Reference Table Summary** at the top of the page.

Download Cross Reference Table as .csv Files

To make extensive edits to a table, you can download it and open it in an application like Excel.

To download a cross reference table for editing

- 1 On the Account Manager tab, click **Service Configuration > Cross Reference Tables**.
- 2 Click the link for the table you want to download.
- 3 Click **Download**, then **Open** or **Save**.
The table opens in Excel.
- 4 Edit the rows in the table.
- 5 Click **Save**.
- 6 To upload the modified table back to Trading Grid Online, go to ["Upload Cross Reference Tables" on page 382](#).

Note: Do not upload the original cross reference table file unless the line endings are LF (line feed). The original files are typically uploaded by Professional Services.

Upload Cross Reference Tables

To upload an edited cross reference table

- 1 On the Account Manager tab, click **Service Configuration > Cross Reference Tables**.
- 2 Click the link for the table you want to upload.
- 3 Click **Upload**.
- 4 Navigate to the file you want to upload, and click **Open**.
- 5 Click **Save**.

Revert Cross Reference Table To Previous Versions

If a previous version of a table is available, you can use the old table instead of one you just modified.

To revert a cross reference table to a previous version

- 1 On the Account Manager tab, click **Service Configuration > Cross Reference Tables**.
- 2 Find the table you want to revert.
- 3 In the Revert Available column, click **Yes**.
- 4 At the confirmation message, click **Yes**.

The table is automatically reverted to the previous version.

Billing

The Billing service is available to users who have billing permissions. It contains a summary of accounts. For each invoiced bill, it lists the following information:

- Invoice Number — Unique invoice number of your bill.
- Invoice Date — Cut-off date of billing in a particular month.
- Due Date — Date when the bills should be paid.
- Customer User ID — Company name in capital letters.
- Account Unit — Currency code that returns a value like USD (US Dollar).
- Total Due — Payable amount in a particular month. Total amount due is the (\$) US Dollar figure.


Topics include:

- ["Configure Invoiced Bill Columns" on page 383](#)
- ["Find an Invoiced Bill" on page 384](#)
- ["View Invoiced Bill Data" on page 384](#)
- ["Print Invoiced Bills" on page 384](#)
- ["View or Download Invoiced Bills" on page 384](#)

Configure Invoiced Bill Columns


You can configure the Invoiced Bills page to show specific columns.

To configure columns in an invoiced bill list

- 1 On the Account Manager tab, click **Billing**.
The Invoiced Bills page opens and lists all invoiced bills.
- 2 Click  **Configure** and make your changes.

Find an Invoiced Bill

To search for an invoiced bill

- 1 On the Account Manager tab, click **Billing**.
The Invoiced Bills page opens and lists all invoiced bills.
- 2 Click  **Search**, and enter your criteria.

View Invoiced Bill Data



Important: To view the data, you must have Adobe Reader installed on your computer. You can download and install the free Adobe Reader from www.adobe.com.

To view data for an invoiced bill

- 1 On the Account Manager tab, click **Billing**.
The Invoiced Bills page opens and lists all invoiced bills.
- 2 Click the applicable **Invoice Number**.
- 3 At the prompt, select **Open this file from its current location**.
- 4 Click **OK**.
The Account Summary page opens and displays the bill in PDF format.

Print Invoiced Bills

To print invoiced bills

- 1 On the Account Manager tab, click **Billing**.
The Invoiced Bills page opens and lists all invoiced bills.
- 2 Click  **Print**.
A new page displays the list. You can resize the page to view the entire list.
- 3 Click  **Print**.
- 4 Select your printing preference, and click **Print**.

View or Download Invoiced Bills

To view or download the invoiced bills

- 1 On the Account Manager tab, click **Billing**.
The Invoiced Bills page opens and lists all invoiced bills.
- 2 Click either **XML** or **CSV**, depending on which format you want.
The **File Download** prompt opens.
- 3 Select **Save this file to disk**, and click **OK**.
The **Save As** prompt opens.
- 4 Locate the directory where you want to save the file, and click **Save**.

Policy

The Password Policy page shows the current user password policy for a company. You can impose a more restrictive password policy.

Initially, a Community Manager set up the password policy for all companies in the community. If you have the Company Administrator or Account Manager role, you can impose a more restrictive password policy.

Important: When you change the password policy, the changes override only the fields where your policy is more restrictive than initially specified.

Topics include:

- [“Change Password Policy” on page 385](#)
- [“Terms and Conditions” on page 385](#)

Change Password Policy

To impose a more restrictive password policy

- 1 Click the **Community Manager** tab > **Company Management** > **Policy**.
The Password Policy page opens and displays the current user password policy.
- 2 Change the value in any field, and click **Save**.

Note: Any change in password policy forces all users at the company to change.

Terms and Conditions

You can create custom Terms and Conditions (T&C) that display for users to read and accept.

Follow these guidelines:

- GXS supplies the default Terms and Conditions (T&C).
- A custom T&C overrides the GXS Terms and Conditions.
- Custom T&C must be approved by the GXS Administrator and GXS Legal team before they are displayed to your users.
- Only one custom T&C is active and displays to ALL users, regardless of their country. That is, you cannot define country-specific Terms and Conditions. You can, however, create a T&C with text in different languages.
- After GXS approval of a T&C, the previously active T&C is made inactive.
- The Terms and Conditions page displays existing T&Cs that you defined. The status for a T&C is:

Status	Description
Draft	Saved T&C, which can be edited at a later point in time. Can be deleted.
Requested	Pending approval by GXS. Cannot be edited, but can be deleted. Only one T&C can have this status.
Active	Last approved T&C. Cannot be edited or deleted.
Inactive	T&C was previously active, but was replaced by another T&C. Cannot be edited or deleted.
Rejected	GXS did not approve this T&C. Cannot be edited, but can be deleted.

From this page, you can do the following.

To view T&C details

- Click the applicable **Reference ID** number.

To edit T&C details

- Click the applicable **Reference ID** number. Remember, only T&Cs with a status of **Saved** can be edited.

To delete a T&C

- 1 Select the T&C.
- 2 Click **Delete T & C**. Remember, only T&Cs with a **Saved**, **Requested**, or **Rejected** status can be deleted.

To create a new T&C

- 1 Click **Create Custom T & C**.
- 2 Select the applicable language.
- 3 Enter the applicable text, using the format options in the toolbar.
- 4 When finished, click **Save**.
- 5 To then create this T&C in a subsequent language,
 - a Select the language.
 - b The new editor opens. Type the text in the selected language.
 - c Click **Save**.
 - d Repeat this step for all other languages you want this T&C to appear in. For example, if you enter text in both English and Italian, the English version will display to users whose default language is English, and the Italian version will display to users whose default language is Italian.
 - e When finished, click **Submit for Approval** to request OpenText approval.

Important: This section applies to Buyers and Suppliers using the classic version of Active Orders. If your company updated to the new version, you are currently performing these functions in the Active Orders component.

Topics include:

- [“Active Order Alert Management” on page 388](#)
- [“Define Alerts” on page 389](#)
- [“Define Business Rules” on page 393](#)
- [“Define Display Templates” on page 397](#)
- [“Add Logos to Documents” on page 402](#)
- [“Upload Terms and Instructions” on page 403](#)
- [“Upload Order Closure and Retention Policy” on page 403](#)
- [“Define Inventory Criteria” on page 404](#)
- [“Manage Department Codes” on page 405](#)
- [“Change Invoice Status Names” on page 405](#)
- [“Manage Email Alerts” on page 406](#)
- [“Field Descriptions and Terms” on page 408](#)

Active Order Alert Management

You need to set up email alert rules for your company; that is, define the circumstances under which you want Active Orders to generate and send an email. For example, if you submitted an order and the supplier has not acknowledged it, you might set up an “Overdue Acknowledgment” alert, where:

- An email is sent every day (**Frequency**).
- Orders must be acknowledged within 2 days (**Threshold = 48**).
- A maximum of 4 emails are sent (**Maximum number of alerts = 4**).

These settings mean if an order has not been acknowledged within 48 hours, Active Orders sends the first email alert. Active Orders sends an email alert each succeeding day until either:

- The Supplier enters an acknowledgement.

or

- Active Orders sends four emails.

If your company is a new user, you must select the document types you want to display in the Message Center on the Operations Center tab.

If your company is an existing user, you might want to eliminate some document types that currently display in the Message Center.

Define Alerts

To define alerts

- 1 Click the **Account Manager** tab > **Service Configuration** > **Buyer Alert Management** or **Supplier Alert Management**.

The Business Process Manager Event Notifications (or Supplier Settings) page opens to the Notifications tab.

- 2 In the top area (optional):

Field	Description
Preferred Email Language	Select the language in which you prefer to receive emails
"From" email address	Change to represent the buying organization. The address that displays is the address that you made your Default Contact when you added your " Service Contacts ."
Email Addresses	Enter the email addresses for the recipients that you defined when you added your " Define Service Contacts " who should receive all email alerts (that you select) for all suppliers. Note: This list should not include your buyer users; they select the alerts they want to receive. To do so, select Other Contacts , and click Modify List .
Frequency	Enter the number of days between alerts when specifying multiple alerts. For example, if you enter 2 , and then select to generate a maximum of 3 alerts for Overdue Shipments, Active Orders generates Overdue Shipment alerts over 6 days — one alert every 2 days for a total of 3 alerts.

3 In the **New Documents** section (suppliers), enter or select:

Field	Description
New Order	Generate an email whenever the Buyer submits an Order to Active Orders.
New Remittance Advice	Generate an email whenever the Buyer submits a Remittance Advice in Active Orders.
New Order Forecasts	Generate an email whenever the Buyer submits a New Order Forecast in Active Orders.
Delivery Method	Whether to generate an Email or display it in the Message Center on the Operations Center page or both. Select for each option.

4 In the **Invoice** section (suppliers), enter or select:

Field	Description
Rejected Invoice	Generate an email whenever the Buyer rejects a non-DSD Invoice in Active Orders.
Rejected DSD Invoice	Generate an email whenever the Buyer rejects a Direct Store Delivery Invoice in Active Orders.
Delivery Method	Whether to generate an Email or display it in the Message Center on the Operations Center page or both. Select for each option.

5 In the **Shipments** section (buyers and suppliers), enter or select:

Field	Description
New Ship Notice Arrival	When a supplier submits a Ship Notice in Active Orders.
Overdue Shipment	When a supplier does not submitted a Ship Notice by your Requested Arrival Date in the order. <ul style="list-style-type: none"> ■ In Threshold, enter the number of hours after the Requested Arrival Date that you want to generate the first alert. ■ In Maximum number of alerts, enter the total number of alerts you want to generate.
Pending Shipment	Before a shipment is due. This is a proactive alert, based on your Requested Arrival Date in the order, that your buyers might want to send to their suppliers as a reminder. <ul style="list-style-type: none"> ■ In Threshold, enter the number of hours before the Requested Arrival Date that you want to generate the first alert. ■ In Maximum number of alerts, enter the total number of alerts you want to generate.
Delivery Method	Whether to generate an Email or display it in the Message Center on the Home page or both. Select for each option.

6 In the **Invoice** section (buyers), enter or select:

Field	Description
New Invoice	When a supplier submits a non-DSD Invoice to Active Orders.
New Direct Store Delivery (DSD) Invoice Arrival	When a supplier submits a DSD Invoice to Active Orders.
Delivery Method	Whether to generate an email or display it in the Message Center on the Home page or both. Select for each option.

7 In the **Orders** section (buyers and suppliers), enter or select:

Field	Description
New Order	When a supplier acknowledges an order in Active Orders.
New Order Acknowledgement	When a supplier acknowledges an order in Active Orders.
Overdue Order Acknowledgement	When a supplier has not acknowledged your order within a certain amount of time. <ul style="list-style-type: none"> ■ In Threshold, enter the number of hours after you submit the Order that you want to generate the first alert. ■ In Maximum number of alerts, enter the total number of alerts you want to generate.
Rejected Order Acknowledgements	When a supplier rejects an order in Active Orders.
New Commitments	When a supplier generates an "order promise" committing to the dates and quantities for the delivery of items that you requested.
Overdue Commitments	When a supplier has not entered commitment data within a certain amount of time. <ul style="list-style-type: none"> ■ In Threshold, enter the number of hours after you submit the Order that you want to generate the first alert, ■ In Maximum number of alerts, enter the total number of alerts you want to generate.
Missed Commitments	When a supplier did not send the correct item quantity or ship the items you requested according to the commitment data the supplier sent.
Delivery Method	Whether to generate an email or display it in the Message Center on the Home page or both. Select for each option selected.

8 In the **Out of Stock** section (buyers and suppliers), enter or select:

Field	Description
Out of Stock	Enter the total number of alerts you want to receive when a product is out of stock.
Delivery Method	Whether to generate an email or display it in the Message Center on the Operations Center page or both.

- 9 In the **UCCEAN Prefix Code** section (suppliers), enter your unique prefix value required for the generation of UCC/EAN-128 complaint barcodes. The UCCEAN code is the standard encoding format for barcodes.

- 10 In the **New Order Forecasts** section (buyers), enter or select:

Field	Description
New Order Forecasts	Track when a Supplier submits a planned material purchases.
Delivery Method	Indicate how to display it in the Message Center on the Home page.

- 11 In the **New Credit** section (buyers), enter or select:

Field	Description
New Credit	Track when a Supplier submits a Credit Note to Active Orders
Delivery Method	Indicate how to display it in the Message Center on the Home page.

- 12 In the **New Debit** section (buyers), enter or select:

Field	Description
New Debit	Track when a Supplier submits a Credit Note to Active Orders
Delivery Method	Indicate how to display it in the Message Center on the Home page.

- 13 In the **Order, Invoice Mismatch Alert** section (buyers and suppliers), select the **Order, Invoice Mismatch Alert** to track order and invoice discrepancies, and select what you want to base mismatches on:

Field	Description
Quantity	When the Order line Quantity does not match the Invoiced line Quantity.
Unit Price	When the Order line Unit Price does not match the Invoiced line Unit Price.
Extended Price	When the Order line Extended Price does not match the Invoiced line Extended Price .
Number of Days	Enter the number of days to keep the alert on the Message Dashboard.
Delivery Method	Whether to generate an email or display it in the Message Center on the Home page or both.

- 14 In the **Order, Ship Notice Mismatch Alert** section (buyers and suppliers), select the **Order, Ship Notice Mismatch Alert** to track order and ship notice discrepancies, and select what you want to base mismatches on.

Field	Description
Quantity	When the Order line Quantity does not match the Ship Quantity.
Unit of Measure	When the type of measure for the item stated on the Order does not match that of the Ship Notice.
Buyer Item ID	When the number or code that you assigned to the line item on the Order does not match that of the Ship Notice.
Number of Days	Enter the number of days to keep the alert on the Message Dashboard.
Delivery Method	Whether to generate an email or display it in the Message Center on the Home page or both.

- 15 Click **Actions**, and click **Preview Alert and Notification Changes**.
 16 Review your settings, click **Actions**, and click **Save** to activate your settings.

Define Business Rules

To define business rules

- 1 Click the **Account Manager** tab > **Service Configuration** > **Business Rules**.

The Business Process Manager Rules page opens.

- 2 Select the options you want to use:

Field	Description
Default Currency Code	Select the currency code that you want your item amounts based on.
Invoice Rules	<p>Select one or more of Invoice rules. For complete information, see Invoice rules in “Field Descriptions and Terms” on page 408.</p> <ul style="list-style-type: none"> ■ Allow non-Order invoice — Select this rule to let Suppliers create Invoices that do not have a corresponding Order. ■ Allow negative invoice quantity — Select this rule to let Suppliers create an Invoice for a negative quantity, that is, a credit against a line item. ■ Allow Supplier to edit invoice discount terms and conditions — Select this rule to let Suppliers change the discount terms and conditions that you specify per your Order. ■ Allow zero tax amount for taxable items — Select this rule to let Suppliers enter '0' as an entry in the Tax Amount field in an invoice. ■ Update the Invoice status to “Received” upon processing an acknowledgement — Select this rule to automatically generate a Received status for the invoice after you send back an acknowledgement that the Invoice has been received, for example, an ANSI X12 997 functional acknowledgement. Otherwise, the status remains Submitted.

Field	Description
Fixed Price Rules	<p>Select one of the Invoice Fixed Price rules. For complete information, see Invoice rules in “Field Descriptions and Terms” on page 408.</p> <ul style="list-style-type: none"> ■ Limit invoice by Order quantity - Tolerance — Ensures Suppliers invoice you only for a Shipped Quantity that equals your Requested Quantity plus a specified Tolerance (percentage of your Requested Quantity). ■ Limit invoice by shipped quantity - Tolerance — Ensures Suppliers invoice you only for a Shipped Quantity that equals the quantity shipped plus a specified Tolerance (percentage of the shipped quantity). ■ Limit invoice by received quantity - Tolerance — Ensures Suppliers invoice you only for a Shipped Quantity that equals the quantity you received plus a specified Tolerance (percentage of the shipped quantity). If you select this rule, you must also select the Limit SN received quantity - Tolerance nn % Ship Notice rule. ■ No rules — Suppliers can invoice you for any quantity.
Invoice Variable Price Rules	<p>Select one or both of the Invoice Variable Price rules. For complete information, see Invoice rules in “Field Descriptions and Terms” on page 408.</p> <ul style="list-style-type: none"> ■ Hide Order value details — Select this rule to keep Suppliers from seeing the Order Total Amount, Unit Price, Extended Price, and Open Amount to Invoice. ■ Limit invoice by price - Tolerance — Ensures Suppliers invoice you only for an amount that equals the Order Total Amount plus a specified Tolerance (percentage of the total dollar amount).
Credit Note Rules	<p>Select one or more of the Invoice Credit Note rules. For complete information, see Invoice rules in “Field Descriptions and Terms” on page 408.</p> <ul style="list-style-type: none"> ■ Credit Amount can exceed Original Line Item Amount — Select this rule to let Suppliers create a Credit Note for an amount greater than the line item amount on the corresponding Invoice. ■ Allow Partial Credit — Select this rule to let Suppliers create a Credit Note for an amount less than the line item amount on the corresponding Invoice. ■ Create Credit Without Invoice — Select this rule to let Suppliers create a Credit Note that does not have a corresponding Invoice.

Field	Description
Ship Notice Rules	<p>Select one or more Ship Notice rules. See Ship Notice rules in “Field Descriptions and Terms” on page 408.</p> <ul style="list-style-type: none"> ■ A Ship Notice cannot have more than one product ID or part number — Ensures Suppliers create a Ship Notice where, for each line item entered, the part numbers are the same. ■ A Ship Notice cannot contain line items with different Ship-To addresses — Ensures Suppliers create a Ship Notice where all line items are shipped to the same address. ■ A Ship Notice cannot contain line items from multiple Orders — Ensures Suppliers create a Ship Notice for line items in only one Order. ■ A Ship Notice cannot be created with a date in the past by more than ____ hours — Ensures in the Shipping Date field, Suppliers only enter a current date, future date, or a date in the past that is within your specified limit. ■ A Ship Notice cannot contain lines previously flagged with “Last Shipment” indicator — Ensures Suppliers do not create a Ship Notice for line items where 100% of the quantity has been shipped. <p>Optionally, select one of the following:</p> <ul style="list-style-type: none"> ■ Limit by Ship Notice scheduled quantity - Tolerance — Ensures Suppliers enter a Ship Quantity that equals the Requested Quantity plus a specified Tolerance (percentage of requested quantity). ■ Limit by Ship Notice received quantity - Tolerance — Ensures Suppliers enter a Ship Quantity that equals the Open Quantity to Ship plus a specified Tolerance (percentage of open quantity). Selecting this rule tells Active Orders to calculate the Open Quantity to Ship based on the quantity you received, rather than the quantity the Supplier shipped. ■ No rules — Suppliers can ship any quantity.

- 3 In the **Order** section, optionally select the **Filter user's message center dashboard and alerts based on department code** rule. If selected, Active Orders message center dashboard as well as email alerts are filtered based on events that are relevant to their particular department codes.
- 4 If you are requesting acknowledgements on a line item level, in the **Line Acknowledgement Attributes** section:
 - If you do not allow partial acknowledgements, select the **All lines in the order must either be accepted or rejected** rule.
 - Select the attributes that the Supplier can change when acknowledging a line item.
- 5 To override Order line deletion, in the **Override Order Line Delete Action** section select:
 - **Line is shipped** — Select this rule to display a line that the Supplier has shipped.
 - **Line is received** — Select this rule to display a line that you have received.
 - **Line is invoiced** — Select this rule to display a line that you have invoiced.

6 To handle missed commitments, in the **A Schedule is Miss Committed When** section, select:

Field	Description
The shipment is split	The shipment is split if the Supplier cannot ship the total ordered quantity at once. This means that the total quantity was divided into two (2) or more shipments with corresponding shipment dates. The schedule is considered as a missed commit if the supplier failed to ship the items on the indicated shipment dates.
The first shipment is ___ days earlier than the requested date OR The final shipment is ___ days later than the requested date in a split shipment scenario	Select this rule to set the number of days between the first shipment and the requested date, OR between the final shipment and the requested date before the schedule is considered as a missed commit.
Split Shipments will not result in miss commitments	Select this rule if the supplier's split shipments are not considered as missed commits.
Commit date is ___ days earlier or ___ later than the requested date	Select this rule to set the number of days wherein the commit date is earlier or later from the requested date.
Commit date is ___ days later than the cancel-by date	Select this rule to set the number of days wherein the ordered item is considered as a missed commit. The ordered items are considered cancelled if the supplier does not commit on or before the indicated number of days.
Commit quantity is over ___% or under ___% of requested quantity	Select this rule to set the variance of the commit quantity over the requested quantity in terms of rate value, which can either be in excess or under the requested quantity.

- 7 Optionally, in the **Extract Rules** section, select the **Include 'transaction date' with data extracts** rule. The **Transaction Date** is when the document arrives in the Active Orders system, which might be different from the current date in the document. If you select this rule, and there are any translation maps based on the version of the extract without Transaction Date, the maps might need to be updated to include the Transaction Date value.
- 8 Optionally, in the **Remittance Advice** section, select the **For a Remittance Advice, the sum of all amounts paid in the advice** rule to display the payment amount on the Remittance Search results page and Remittance Advice Header page.
- 9 Click **Actions**, and click **Preview Alert and Notification Changes**.
- 10 Review your settings. Click **Actions**, and click **Save** to activate your rules.

Define Display Templates

Topics include:

- "Order Display Template" on page 397
- "Ship Notice Display Template" on page 397
- "Invoice Display Template" on page 399
- "Remittance Advice Display Template" on page 400
- "DSD Invoice Display Template" on page 400
- "Credit Note Display Template" on page 401
- "Debit Note Display Template" on page 402

Order Display Template

Use this procedure to set up a display template for orders. The template determines the information displayed to both you and your suppliers.

To set up a display template for orders

- 1 Click the **Account Manager** tab > **Service Configuration** > **Form Edits**. If necessary, click the Order tab.
The Form Edits - PO page opens.
- 2 In **Pre-Defined Fields**, change the names of the fields.
- 3 In **Header/Summary Fields**, specify the fields to display in the Header section.
- 4 In **Header Acknowledgment Fields**, click the check box next to the section title to display the fields. Then, specify the fields to display.
- 5 In **Buying Company Address**, **Bill To Address**, **Supplier Company Address**, **Ship To Address**, and **Mark For Address**, click the check box next to the section titles to display the fields.
- 6 In the remaining sections, click the check box next to the section titles to display the fields. For each section, specify the fields to display.
- 7 Click **Actions**, and click **Preview Form Edit Changes**.
- 8 Review your settings.
- 9 Click **Actions**, and click **Submit** to activate your edits.

Ship Notice Display Template

Your company might require suppliers to provide certain data elements as part of the Ship Notice. Use this procedure to create the Ship Notice you want your suppliers to send.

To create ship notices

- 1 Click the **Account Manager** tab > **Service Configuration** > **Form Edits**.
The Form Edits - PO page opens.
- 2 Click the **Ship Notice** tab.
The Form Edits - Ship Notice page opens.

- 3** In the **Header/Summary Fields** section, indicate which fields you want to display on the Ship Notice, if they are required, and field lengths. Maximum field lengths are:

Field	Length	Field\	Length
Ship Notice Number	30	Notes	80
Carrier Code	17	Name	60
Carrier Name	35	Address	55
Carrier Tracking Number	30	City/Town	30
Transport Number	10	State/Province	2
Packing List Number	30	Postal Code	15
Amount of Packaging	7	Weight	10

- 4** In the **Buyer Defined Input Fields - Header Level** section:
- a** Define additional fields you want to see in the Ship Notice header. Each field has a maximum of **30** characters.
 - b** To set a pairing condition, from the **Flex Field Pair** section, select a corresponding flex-field.
Example: If Header Field 1 is paired with Header Field 2 (which is Flex-Field 2) and if the supplier enters a value on field 1, then field 2 should also have a value. Otherwise, Active Orders generates an error if field 2 has no value. If the supplier does not put a value in either field, then no condition is affected.
- 5** In the **Ship From Address, Shipment Equipment, and Line Field** sections, specify the fields you want to display.
- 6** In the **Buyer Defined Input Fields - Header Level** and **Buyer Defined Input Fields - Line Level** sections:
- a** Define additional fields that you want to see in the line item header area of the Ship Notice. Each field has a maximum of **30** characters.
 - b** To set a pairing condition, from the **Flex Field Pair** section, select a corresponding flex-field.
Example: If Line Field 1 is paired with Line Field 2 (which is Flex-Field 2) and if the supplier enters a value on field 1, then field 2 should also have a value. Otherwise, Active Orders generates an error if field 2 has no value. If the supplier does not put a value in either field, then no condition is affected.
- 7** In setting up the Ship Notice display template, customize the drop-down lists for Standard Carrier Alpha Codes, Service Contracts, and Buyer Locations. To do so:
- a** Click **Actions**, and click **Code Table Management**.
 - b** Select the **Code Table Name**, enter the information in the fields, and click **Add**.
Repeat this step for all the codes you want to add.
 - c** Repeat steps a and b.
 - d** Click **Actions**, and click **Save Code List** to save your codes.
- 8** Click **Preview Buyer Setting Changes**.

- 9 Review the Ship Notice, and click **Submit** to save the settings.

Invoice Display Template

Your company might require suppliers to provide certain data elements as part of an Invoice. Use this procedure to create the Invoice form you want your suppliers to send you.

To create an invoice form for suppliers

- 1 Click the **Account Manager** tab > **Service Configuration** > **Form Edits**.
The Form Edits - PO page opens.
- 2 Click the **Invoice** tab.
The Form Edits - Invoice page opens.
- 3 In the first two sections, indicate which fields you want to display on the Invoice., if they are required, and specify field lengths.
- 4 In the **Buying Company Address**, **Bill To Address**, and **Supplier Company Address** sections:
 - a Click the box next to the section titles if you want those fields to display.
 - b In each section, indicate the fields you want to display on the Invoice, if they are required, and specify field lengths.
- 5 In the **SAC Header** (Service Allowance or Charge) section, select the check box next to the section title if you want the fields to display. Specify the **Number of SAC** lines and fields you want to display.
- 6 In the **Buyer Defined Input Fields - Header Level** section:
 - a Define the fields you want to display on the Invoice, if they are required, and specify field lengths.
 - b To set a pairing condition, from the **Flex Field Pair** section, select a corresponding flex-field.
Example: Header Field 1 is paired with Header Field 2 (which is Flex-Field 2). If the supplier enters a value on field 1, then field 2 should also have value. Otherwise, Active Orders generates an error if field 2 has no value. If the supplier does not put any value on both fields, then no condition is affected.
- 7 In the **SAC Header** (Service Allowance or Charge) and **SAC Line** sections, click the check box next to the section title if you want the fields to display. Specify the number of lines and the fields to display.
- 8 In the **Buyer Defined Input Fields - Line Level** section:
 - a Define the fields to display on the Invoice, if they are required, and specify field lengths.
 - b To set a pairing condition, from the **Flex Field Pair** section, select a corresponding flex-field.
Example: Line Field 1 is paired with Line Field 2 (which is Flex-Field 2). If the supplier enters a value on field 1, then field 2 should also have value. Otherwise, Active Orders generates an error if field 2 has no value. If the supplier does not put any value on both fields, then no condition is affected.

- 9 In setting up the Invoices display template, you can customize the drop-down lists for Special Charge and Allowance Codes, Line Tax Code, Line Tax Country Code, and Unit of Measure. To do so:
 - a Click **Code Table Management**, and select a **Code Table Name**.
 - b Add codes or select existing codes, and **Edit** or **Delete** them.
 - c Click **Save Code List** to save your changes.
- 10 Click **Actions** and click **Preview Form Edit Changes**.
- 11 Review your settings, and click **Actions** and then click **Submit** to save the settings.

Remittance Advice Display Template

Specify the names of fields on a Remittance Advice.

To specify field names on a remittance advice

- 1 Click the **Account Manager** tab > **Service Configuration** > **Form Edits**.
The Form Edits - PO page opens.
- 2 Click the **Remittance Advice** tab.
The Form Edits - RA page opens.
- 3 In the **Pre-Defined Fields** section, change the names of the fields.
- 4 In the **Header/Summary Fields** section, specify the fields you want to display in the Header section.
- 5 In the **Supplier Company Contact Details** and **Buyer Company Contact Details** sections, click the check box next to the section titles if you want any of the fields to display. Then, for each section that you selected, specify the fields that you want to display.
- 6 In the **Line Item Fields** section, specify the fields that you want to display.
- 7 Click **Actions** and click **Preview Form Edit Changes**.
- 8 Review your settings, click **Actions**, and click **Submit** to activate your edits.

DSD Invoice Display Template

Your company might require suppliers to provide certain data elements as part of a DSD Invoice. Use this procedure to create the Invoice form you want your suppliers to send you.

To create a DSF invoice form for suppliers

- 1 Click the **Account Manager** tab > **Service Configuration** > **Form Edits**.
The Form Edits - PO page opens.
- 2 Click the **DSD Invoice** tab.
- 3 In the first section, indicate the fields you want to display on the Invoice, if they are required, and specify field lengths. For one field, select the name.
- 4 In the **Line Fields** section, click the check box next to the section title if you want those fields to display. Indicate which fields you want to display on the Invoice, if they are required and, for three fields, select the name.
- 5 In the **Buying Company Address**, **Bill To Address**, and **Supplier Company Address** sections, click the check box next to the section titles if

you want those fields to display. In each section, indicate which fields you want to display on the Invoice, if they are required, and specify field lengths.

- 6 In the **SAC Header** (Service Allowance or Charge) and **SAC Line** sections, click the check box next to the section titles if you want the fields to display. Specify the number of lines and the fields that you want to display.
- 7 In the **Buyer Defined Input Fields - Header Level** and **Buyer Defined Input Fields - Line Level** sections:
 - a Define the fields you want to display on the Invoice, if they are required, and specify field lengths.
 - b To set a pairing condition, from the **Flex Field Pair** section, select a corresponding flex-field.
Example: Header/Line Field 1 is paired with Header/Line Field 2 (which is Flex-Field 2). If the supplier enters a value on field 1, then field 2 should also have value. Otherwise, Active Orders generates an error if field 2 has no value. If the supplier does not put any value on both fields, then no condition is affected.
- 8 Click **Actions** and click **Preview Form Edit Changes**.
- 9 Review your settings., click **Actions**, and click **Submit** to save the settings.

Credit Note Display Template

Your company might require suppliers to provide certain data elements as part of a Credit Note. Use this procedure to create the form you want your suppliers to send you.

To create a credit note form for suppliers

- 1 Click the **Account Manager** tab > **Service Configuration** > **Form Edits**.
The Form Edits - PO page opens.
- 2 Click the **Credit Note** tab.
- 3 In the first two sections, indicate which fields you want to display on the Credit Note, if they are required. For some fields, you can specify field lengths.
- 4 In the **Buying Company Address**, **Bill To Address**, and **Supplier Company Address** sections, click the check box next to the section titles if you want those fields to display. In each section, indicate which fields you want to display on the Invoice, if they are required, and specify field lengths.
- 5 In the **SAC Header** (Service Allowance or Charge) and **SAC Line** sections, click the check box next to the section titles if you want the fields to display. Specify the **Number of SAC Lines** and the fields that you want to display.
- 6 In the **Buyer Defined Input Fields - Header Level** and **Buyer Defined Input Fields - Line Level** sections:
 - a Define the fields you want to display on the Credit Note, if they are required, and specify field lengths.
 - b To set a pairing condition, from the **Flex Field Pair** section, select a corresponding flex-field.
Example: If Header/Line Field 1 is paired with Header/Line Field 2 (which is Flex-Field 2) and if the Supplier enters a value on field 1, then field 2 should also have value. Otherwise, Active Orders generates an error if field

2 has no value. If the Supplier does not enter a value in either field, then no condition is affected.

7 Click **Actions** and click **Preview Form Edit Changes**.

8 Review your settings, click **Actions**, and click **Submit** to save the settings.

Debit Note Display Template

Your company might require Suppliers to provide certain data elements as part of a Debit Note. Use this procedure to create the form that you want your suppliers to send you.

To create a debit note form for suppliers

1 Click the **Account Manager** tab > **Service Configuration** > **Form Edits**.

The Form Edits - PO page opens.

2 Click the **Debit Note** tab.

3 In the first two sections, indicate which fields you want to display on the Debit Note and if they are required.

4 In the **Buying Company Address**, **Bill To Address**, and **Supplier Company Address** sections, click the check box next to the section titles if you want those fields to display. In each section, indicate which fields to display on the Invoice, if they are required, and specify field lengths.

5 In the **SAC Header** (Service Allowance or Charge) and **SAC Line** sections, click the check box next to the section titles if you want the fields to display. Specify the fields to display.

6 In the **Buyer Defined Input Fields - Header Level** and **Buyer Defined Input Fields - Line Level** sections, define the fields to appear on the Debit Note, if they are required, and specify field lengths.

7 Click **Actions** and click **Preview Form Edit Changes**.

8 Review your settings, click **Actions**, and click **Submit** to save the settings.

Add Logos to Documents

Use this procedure to upload your corporate logo so it appears on all documents.

Note:

- Logo files must be *.gif or *.jpg.
- Maximum size is **5000 bytes**.
- Maximum width **160 pixels**.
- Maximum height is **64 pixels**.

To upload a corporate logo

1 Click the **Account Manager** tab > **Service Configuration** > **Branding**.

The Upload Organization Logo(s) page opens.

2 Select the language of the logo(s) you want to upload.

3 Click **Browse** to locate the logo file.

- 4 Click **Upload** to add the file to the list.
- 5 Repeat steps 3 and 4 for all logo files that you want to upload.
- 6 From the list of uploaded files, select a logo file, and click **Preview**.
- 7 For the logo to appear on your documents, click **Publish**.

Important:

- If you do not perform steps 6 through 7, the logo does not display on documents.
- If you previously published a logo, re-publishing a new logo overrides the previous logo.

Upload Terms and Instructions

Use this procedure to upload a Terms and Instructions document(s) in .DOC, .PDF, .HTML, etc., formats. The document is common to all orders; each order header contains a link to the document(s), which prompts the Supplier to read it. If your company subscribes to the Active Orders Inventory function, you can upload terms and instructions for that function.

To upload terms and instructions

- 1 Click the **Account Manager** tab > **Service Configuration** > **Branding**.

The Upload Standard Terms and Instruction File(s) page opens.

- 2 Select the function to which you want to upload **Terms And Instructions**.
- 3 Click **Browse** to locate your file, and click **Attach** to add it to the list.

Note: The file size cannot exceed **2000 KB**.

- 4 Repeat these steps for all files you want to upload.

Upload Order Closure and Retention Policy

To upload terms and instructions

- 1 Click the **Account Manager** tab > **Service Configuration** > **PO Closure & Archival Policy**.

The PO Closure Status page opens.

- 2 Select the condition(s) under which you want Active Orders to close all orders.
- 3 For the retention period, enter the

- **Closed PO Retention Period** — Number of days Active Orders should hold a closed order in the system, after which the order is deleted, along with its related documents.
- **Maximum Retention Period** — Number of days Active Orders should hold any inactive document.

- 4 Click **Actions** and click **Preview PO Closure & Archival Policy**.
- 5 Review your settings, click **Actions**, and click **Save** to activate this policy.

Define Inventory Criteria

Use these topics to define the parameters you want for the Inventory function.

Topics include:

- ["Time Period" on page 404](#)
- ["Location Hierarchy" on page 404](#)

Time Period

Use this procedure to define the time period in which you want to see shipment activity, that is, the amount of stock shipped.

To enter a time period for inventory criteria

- 1 Click the **Account Manager** tab > **Service Configuration** > **Time Period**.
The Time Period Configuration page opens.
- 2 Select the **Current Frequency** for which you want to see a shipped stock total; for example, weekly, monthly, etc.
- 3 Select the day of the week \ you want the week to begin on for data reporting purposes. The selected day is referred to in **WTD** report columns.
- 4 Click **Save** to save your settings.

Location Hierarchy

Use this procedure to set up a hierarchy of your inventory locations so you and your suppliers can find inventory data and search for out-of-stock conditions.

For example, you might want to set up the following hierarchy:

Eastern region

Northeast

- Philadelphia
- Trenton

Southeast

- Atlanta
- Savannah
- Raleigh

Western region

To define an inventory hierarchy

- 1 Click the **Account Manager** tab > **Service Configuration** > **Location Hierarchy**.
The Location Administration page opens.
- 2 To add a sub-location, click *****All Locations***** and select **Add sub-location**.
- 3 For the new sub-location, enter an ID number, name, and location, and click **Save** to save the new sub-location.

4 Repeat steps 2 through 3, as needed to add sub-locations.

Note:

- You can add sub-locations to sub-locations by clicking the sub-location and selecting **Add sub-location**.
- To change sub-location information, click that sub-location and select **Edit**.
- To remove a sub-location, click that sub-location and select **Delete**.

5 Click **Save** to save your hierarchy.

Manage Department Codes

Use this procedure to set up the Department Codes you want displayed on the message center dashboard and in email alerts.

To set up department codes

1 Click the **Account Manager** tab > **Service Configuration** > **Manage Dept Codes**.

The Manage Dept Codes page opens.

2 Select a user from the **Buyer User** drop-down list.

The department codes for the selected user display.

3 On the **Department Codes** section, select department code(s).

Note: To select multiple codes from the list, hold **CTRL** key from the keyboard and left-click the mouse. You can **Add**, **Edit** and **Delete** department code(s).

4 Perform the appropriate action:

To . . .	Do this:
Add your selections on the User Department Codes section	<ul style="list-style-type: none"> ■ Click Add to User.
Remove department code(s)	<ul style="list-style-type: none"> ■ Select department code(s) on User Department Codes, and click Remove from User.

5 Click **Actions**, and click **Preview Manage Dept Codes**.

6 Review your settings, click **Actions**, and click **Save** to activate the Department Codes.

Change Invoice Status Names

Use this procedure to change the word for a particular invoice status in Active Orders. For example, a buyer or suppliers might want an Invoice that is "In Progress" to display a status of "Processing."

To modify invoice status names

1 Click the **Account Manager** tab > **Service Configuration** > **Manage Invoice Status**.

The Manage Invoice Status page opens.

- 2 For an Active Orders status, select the word you want to display.
- 3 Click **Actions**, and click **Preview Manage Invoice Status**.
- 4 Review your settings, click **Actions**, and click **Save** to activate the new statuses.

Manage Email Alerts

Your Company Administrator has set up a series of email alerts, which you can specify to receive, including the:

- **Type of alert** - for example, an overdue shipment
- **Alert threshold**, that is, the number of hours before/after you receive the first alert. For example, 24 hours after a shipment is overdue.
- **Number of alerts** per document; for example, 2.
- **Alert frequency**, that is, number of days between alerts. For example, 1 day.

Use this procedure to determine and set up the alerts that you want to receive. You can also specify that suppliers also receive certain alerts.

Note: You cannot change the type of alert, the alert threshold, the number of alerts, or the alert frequency. Contact your Company Administrator if you have any issues with the settings.

See also [“Modify Your Email Alert Settings” on page 407](#).

To set up your personal email alerts for the first time

- 1 Click the **Account Manager** tab > **Service Configuration** > **User Alert Settings**.

The Business Process Manager Event Notifications page opens to the **User Settings** tab.

- 2 To set up your first Supplier Company:
 - a Click **Actions**, and click **Add Supplier Company**.
The **Search** pop-up opens.
 - b Enter the complete or partial **Supplier Company** name, and click **Find**.
The search results display.
 - c Select the Supplier(s), and click **Submit**.
The Supplier(s) are listed in the **Alert Management** section, followed by the types of alert(s) your Company Administrator has set up for your company.
- 3 Repeat these steps for all supplier companies in which you are interested.
- 4 Optionally, in the **Default Email Distribution** section, enter your email address to ensure all email alerts for all supplier companies selected in the next step are sent to you. You can add additional recipients, but they receive all email alerts that you select. You can add recipients for specific alerts in specific companies in step 6.
 - a Click **Modify List**.

A list opens.

- b** Select the recipient you want all alerts that you select to be sent to. If you do not find the recipient you need, see the [“Define Service Contacts”](#) topic.
- c** Click **Submit**.

The recipient(s) display in the **Default Email Distribution** section.

Note: To remove an address from the distribution list, select it and click **Delete**.

- 5** In the **Alert Management** section, select the alert(s) you want to receive for each supplier company. For alert definitions, see [“Field Descriptions and Terms”](#) on page 408.
- 6** To add additional recipient(s), such as the supplier, to an alert you selected, do the following:
 - a** Click the icon adjacent to the selected alert.
A pop-up opens
 - b** Click **Modify List**.
 - c** Select the recipients you want this alert to be sent to. If you do not find the recipient you need, see the [“Define Service Contacts”](#) topic.
 - d** Click **Save**
- 7** Repeat these steps for other alerts you want to add an additional recipient(s) to.
- 8** Click **Actions**, and click **Save Alert Settings**.

Modify Your Email Alert Settings

Keep these tips in mind when modifying email alert settings:

- You cannot change the type of alert, the alert threshold, the number of alerts, or the frequency. Contact your Company Administrator if you have any issues with these settings.
- If your Company Administrator adds a new alert that you want to receive, select it and **add your address** to the alert email list.
- In the **Default Email Distribution** section, adding, deleting, or replacing an email address(es) **does not effect** previously selected alerts. That is, if you add a new email address in this section, you must also add that address to any previously selected alerts that you want that recipient to receive.

To modify your email alert settings

- 1** Click the **Account Manager** tab > **Service Configuration** > **User Alert Settings**.

The Business Process Manager Event Notifications page opens to the **User Settings** tab.

- 2** To add supplier(s):














- a** Click **Actions**, and click **Add Supplier Company**.









The **Search** pop-up opens.

- b** Enter the complete or partial **Supplier Company** name, and click **Find**.
The results of your search display,

- c Select the applicable supplier(s), and click **Submit**
- 3 To receive emails for a previously unselected alert, select that alert. Click the adjacent icon to make sure your email address is on the list. If it is not, add it by clicking **Modify List** and selecting yourself from the page that opens.
- 4 To stop receiving emails for a specific alert, clear (de-select) the alert.
Note: When you clear an alert, all recipients no longer receive emails.
- 5 To remove yourself as a recipient, or another recipient:
 - a Make sure the alert is still selected.
 - b Click the icon adjacent to the selected alert.
 - c Select the recipient, and click **Delete**
 - d Click **Save**.
- 6 Click the **Save** action.






Field Descriptions and Terms

Icon	Description
	Indicates no comments or remarks were made.
	Comments exist for this field. Click the icon to read the text.
 status	Supplier acknowledged and accepted the Order.
 status	Supplier acknowledged the Order, but neither accepted nor rejected it.
 status	Order does not require an acknowledgment.
 status	Supplier acknowledged, but rejected, the Order.
 status	Supplier acknowledged part of the Order, but not the entire Order.
 status	Fully committed status. Supplier agreed to both the date and quantity requested for all schedules in the Order.
 status	Partially committed status. Supplier has not entered commitment data for all schedules in the Order, but, for the ones entered, has agreed to both date and quantity requested.
 status	Fully missed status. Supplier committed to all schedules in the Order, but the date or quantity committed to were not as requested in at least one schedule.
 status	Partially missed status. Supplier did not commit to all schedules in the Order, and, for one or more of the committed schedules, the committed date or quantity was different from the requested date or quantity.
 status	Partial credit status. Partial credit against the associated Invoice.
 status	Full credit status. Complete credit against the associated Invoice.

Icon	Description
status	Deleted status. Status occurs when, because of a change or a delivery, the Requested Quantity for a part schedule or Order line item becomes zero.
 status	Supplier invoiced all line items in the Order.
 status	Supplier invoiced some of the line items in the Order.
 status	A previous Invoice(s) exists against this Order.
 status	You or your Hub paid the entire Invoice.
 status	You or your Hub made partial payment(s) against the Invoice.
 status	Supplier shipped all line items in the Order.
 status	Supplier shipped some of the line items in the Order.
 status	Supplier opened the Order.

Acknowledged Status

The Supplier acknowledged the Order by accepting or rejecting it, or the system received an EDI Order Acknowledgement. Icons include:

-  Acknowledged and **accepted**.
-  Acknowledged but **rejected**.
-  Acknowledgment not required.
-  Acknowledged, but neither accepted nor rejected.
-  Acknowledged part of the Order, but not the entire Order.

additional data

Additional data fields you or the Supplier entered for the document.



adjusted amount

On a Remittance Advice, your approved amount. This amount is subtracted from the Invoice Amount, resulting in the Net Amount Paid to the Supplier.

Allowances/Charges

An *allowance* is an additional amount that you allow the Supplier to add to the Invoice (for example, an allowance for freight charges).

A *charge* is an amount that you are requesting the Supplier to subtract from the Invoice (for example, promotional discount).

A  next to the amount indicates you made comments about this charge. Click the  to read the comments.

Amount

- On the Invoice Search Result page, the total Invoice amount.

- On the Remittance Advice Search and Search Result pages, the Invoice amount that was paid.

Note: On the Search page, enter the Invoice amount paid to access the Remittance Advice for that Invoice. To do so, enter the exact amount, or your search results will not be valid.

- On the Order Search Results page, the total amount of the Order.

Amount of Packaging

Number of **Packaging Type** units being shipped.

Bill to Address

Address where the Invoice should be sent for payment.

blanket Order

Your long-term commitment to the supplier for a part against which short-term releases are generated to satisfy requirements. Often, blanket Orders cover only one part with pre-determined delivery dates. A blanket Order is synonymous to a standing Order.

buyer

The customer, or the entity that issues Orders to Suppliers/Vendors.

Buyer

Buying Company

Refers to your company name and contact information.

Buyer Item ID

Buyer Part #

Buyer Part Number

Number or code you assigned to the line item, which is the part number associated with the part schedule or the Order line item.

Carrier

Carrier Name

Name of the shipping vendor or the routing method used by the shipping vendor.

Carrier Code

The standard carrier alpha code (SCAC).



Carrier Tracking Number

The number assigned by the shipping vendor to track this shipment.

charges and allowances

An *allowance* is an additional amount that you allow the Supplier to add to the Invoice (for example, an allowance for freight charges)

A *charge* is an amount that you request the Supplier subtract from the Invoice (for example, promotional discount).

A  next to the amount indicates that you made comments about this charge. Click the  to read the comments.

Column to Sort by

On any of the Search pages, specify how you want your search results sorted. By default, results are sorted in ascending or descending order based on the data in the column you select.

To change the order, select a sort option beneath the field.

commit

For an Order that is a Stock Transfer Order (STO), the Supplier must commit to the dates and quantities for the delivery of items that you requested. This process generates a "Promise," which you can review and use to evaluate the Supplier's performance about whether the Supplier meets your commitments. You decide if the Supplier must commit to an Order.


Commit Date


Date when you receive the shipment. This date cannot be before your Requested Date.


Commit Quantity


The number of the ordered parts that arrive at your specified location on the Commit Date.

commitment statuses



 **Fully committed.** The Supplier agreed to both the date and quantity requested for all schedules in the Order.

 **Partially committed.** The Supplier has not entered commitment data for all schedules in the Order but, for the ones entered, has agreed to both date and quantity requested.


 **Fully missed.** The Supplier committed to all schedules in the Order, but the date or quantity committed to were not as requested in at least one schedule.


 - **Partially missed.** The Supplier did not commit to all schedules in the Order and, for one or more of the committed schedules, the committed date or quantity was different from the requested date or quantity.

Comments

Optional text that provides information about the document. A  in this field indicates you made comments. Click the  to read the comments.

Credit Note statuses

 **Partial credit.** The Supplier entered a partial credit against the associated Invoice.

 **Full credit.** The Supplier entered a complete credit against the associated Invoice.

Currency

Code indicating the type of money, for example, **USD** for the United States dollar or **JPY** for the Japanese yen, that the item amount is based on. Currency for an Invoice is the same as its corresponding Order. If there was no associated Order, the currency is usually that of the Supplier's country.

For Remittance Advices:

- On the Search page, you can specify the type of currency for which you want to see payment advices.

- On the Search Results or Details page, lists the type of currency in which payment was made for that advice.

Date

On the Search Result pages, the date that the document was created.

Date Prepared

Creation date of the Remittance Advice.

Date Range

The starting (**From**) and ending date (**To**) between which you want to see Invoices, Orders, Shipping Notices, or Remittance Advices. Click the calendar icon to select the dates. Or, enter the dates in the specified format (**mm/dd/yyyy** or **dd-mm-yyyy**, or **yyyy-mm-dd**). Then, select the type of date you are looking for, either:

- Document — Date the user entered in the document itself.
- Transaction — Date when the document arrives in the OLV system.

For Shipping Notices or Order schedules, the system finds those with a Requested Arrival Date within the **Date Range** you specify.

For Invoices or Remittance Advices, the system finds those with a creation date within the **Date Range** you specify.

Debit Amount

- On the Debit Note Search Result page, the total Debit Note amount.
- On the Remittance Advice Search and Search Result pages, the Invoice amount that was paid.


Note: On the Search page, enter the Invoice amount paid to access the Remittance Advice for that Invoice. To do so, enter the exact amount, or your search results will not be valid.

- On the Order Search Results page, the total amount of the Order.

Debit Note Number

Unique identifier for the Debit Note the Buyer assigns when creating the Debit Note.

Debit Note statuses

 **Partial debit.** The Buyer entered a partial debit against the associated Invoice.

 **Full debit.** The Buyer entered a complete debit against the associated Invoice.

Default currency code

Select the code indicating the type of money you want your item amounts based on.

Deleted or status

This status occurs when you delete either the Order or the Requested Quantity for a part schedule or Order line item.

Department Code

A buyer-assigned code identifying the internal department carrying this product.

Note: Usually used in a retail context.

Description

Short description of the line item.

Discount/Adj Amount

On a Remittance Advice, the amount by which you adjusted the Supplier's Invoice amount. It could be the amount specified by the Buyer Approver during the adjudication process. This amount is subtracted from the *Invoice Amount*, resulting in the *Net Amount Paid* to the Supplier.

Discount (percent)

Percent of the discount for the Invoice if you pay it within the number of allowed Discount Days.

Discount Days

The number of days that you have to pay the Invoice and still be eligible for the discount.

Download

Download Summary

Click this action to download all pages of your search results into a Microsoft Excel spreadsheet (.xls).

End Date

Expiration date of a blanket Order.

Equipment for transport

How the items are being shipped, for example, Trailer. **Mutually Defined** indicates you and the Supplier discussed this and agreed on the shipment transport equipment.

Exit

Click this link to exit Order Lifecycle Visibility and close your browser.

Extended Price

The unit price of the line item multiplied by the quantity that was invoiced.

The extended price is affected by products that are sold in unit multiples. If the you specified that the product is sold in multiples, the **Multiple Quantity** field identifies how many of this item represent a unit. To determine the extended price, the system divides the quantity ordered by the quantity of the multiple, and then multiplies by the unit price.

Firm status

You generate this status.

Note: This is a "true" order that you are requesting the Supplier to fill. That is, you are committing to purchase.

- This Order line item order is for a stipulated period of time.
- You cannot change the Order line item order details during the stipulated time period.
- The Supplier has not yet committed to the Order line item order.

- The Order line item has an assigned Order number.

FOB Description

FOB Terms

Specifies FOB (Free-on-Board) Destination (**DE**) or Origin (**OR**).

- **FOB Destination** indicates that the Supplier own the goods while in transit and is responsible for any loss or damage up to the time of delivery.
- **FOB Origin** indicates that you are responsible for any loss or damage of the goods while in transit.

Forecast

A schedule with **planned** status.

GTIN

Global Trade Identification Number. Number or code you assigned to the line item. The part number associated with the part schedule or the Order line item.

Hub

Refers to your company name and contact information.

Invoice

Bill prepared by the Supplier of goods or services, and then submitted to you for payment. An Invoice lists all items or services bought, together with amounts.

Invoice Amount

Inv. Amount

- When creating an Invoice, the total Invoice amount that the Supplier is billing you. This amount is for the items ordered or services that you received.
- On the Invoice Search Results page, the total Invoice amount that the Supplier billed.
- For a Remittance Advice, the amount that you specified during the adjudication process. This amount, minus the *Discount/Adj Amount*, results in the *Net Amount Paid* you paid.

Inv. Date

Invoice Date

Date the Invoice was created or entered into the system.

Invoice Gross Amount

Sum of the Invoice line item amounts (including **Allowances and Charges**) plus any freight or tax charges.

Invoice Line No

The line number of the line item in the Invoice.

Invoice No.

Invoice Number

Invoice Number to use

Unique identifier for the Invoice that the Supplier assigns when creating the Invoice.

On the Search for Invoice and Search for Remittance Advice pages, you can specify the Invoice for which you want to see information. Or, you can enter a partial Invoice Number followed by an asterisk (*).

On any Search Results page, click the number to see Invoice information.

Invoice rules

These rules are set by the Company Administrator.

Rule	Select rule to . . .
Allow negative invoice quantity	Let Suppliers create an Invoice for a negative quantity, that is, the Supplier can create a credit against a line item. For example, if the Unit Price is \$100 and the Qty Available to Invoice is 40 and the Supplier enters a Ship Quantity of -20 , the line item extended value would be -\$-2000 and the Qty Available to Invoice would be adjusted to 60 .
Allow non-Order Invoice	Let Suppliers create Invoices that do not have a corresponding Order.
Allow Supplier to edit invoice discount terms and conditions	Let Suppliers change the discount terms and conditions that you specify per your Order.
Limit invoice by Order quantity - Tolerance nn %	Ensure Suppliers invoice you only for a Shipped Quantity that equals your Requested Quantity plus a specified Tolerance (percentage of your Requested Quantity). Otherwise, the Supplier can invoice you for any Shipped Quantity , even one that exceeds your Requested Quantity. For example, if the Requested Quantity = 100 and Tolerance = 10% , and the Supplier creates an Invoice for a Shipped Quantity of 111 , <ul style="list-style-type: none"> ■ If this rule is “on” (selected), OLV gives the Supplier an error message stating “Customer will not allow invoicing greater than X% over the Order Qty,” and the Invoice is not submitted to you. ■ If this rule is “off” (not selected), OLV submits the Invoice to you.
Limit invoice by shipped quantity - Tolerance nn %	Ensure Suppliers invoice you only for a Shipped Quantity that equals the quantity shipped plus a specified Tolerance (percentage of the shipped quantity). Otherwise, the Supplier can invoice you for any Shipped Quantity , even one that exceeds the quantity shipped. For example, if the Shipped Quantity is 100 and Tolerance is 5% , and the Supplier creates an Invoice for a Shipped Quantity of 110 , <ul style="list-style-type: none"> ■ If this rule is “on” (selected), OLV gives the Supplier an error message stating “Customer will not allow invoicing greater than X% over the Shipped Qty,” and the Invoice is not submitted to you. ■ If this rule is “off” (not selected), OLV submits the Invoice to you.
Limit invoice by receipt quantity - Tolerance nn %	Ensure Suppliers invoice you only for a Shipped Quantity that equals the quantity received plus a specified Tolerance (percentage of the shipped quantity). Otherwise, Suppliers can invoice you for a Shipped Quantity that exceeds the what you received. Important If you select this rule, you must also select the Limit SN received quantity - Tolerance nn % Ship Notice rule .
No rules	Enforce no quantity restrictions on a Supplier Invoice.
Hide Order value details	Prevent Suppliers from seeing the Order Total Amount , Unit Price , Extended Price , or the Open Amount to Invoice (maximum amount the Supplier can invoice).
Limit invoice by price - Tolerance nn %	Ensure Suppliers invoice you only for an amount that equals the Order Total Amount plus a specified Tolerance (percentage of the total dollar amount). Otherwise, the Supplier can create an Invoice that exceeds the Order Total Amount .
Credit Amount can exceed Original Line Item Amount	Let Suppliers create a Credit Note for an amount greater than the line item amount on the corresponding Invoice.

Rule	Select rule to . . .
Allow Partial Credit	Let Suppliers create a Credit Note for an amount less than the line item amount on the corresponding Invoice.
Create Credit Without Invoice	Let Suppliers create a Credit Note that does not have a corresponding Invoice.

Invoice Status

Invoice status includes:

- **Paid** — You submitted Remittance Advice document against the Supplier's invoice.
- **Approved** — You read the Invoice and approved it for payment.
- **Rejected** — You read the Invoice and will not approve it. You should enter explanatory comments for the Supplier.

Invoice Ticket Number

Field used for DSD Invoices. Number of the delivery ticket. There might be multiple delivery ticket fields.

Invoice Total

The total invoice amount, which is:

the **extended line item price**, which is the unit price of the line item multiplied by the quantity invoiced

plus

any **Allowances**

minus

any **Charges**

plus

any **Freight** amount

plus

any **Tax** amount

For a Remittance Advice, the invoice total is the amount specified during the adjudication process. This amount, minus the *Discount/Adjusted Amount*, results in the *Net Amount Paid* by you.

Invoice types

Common Invoice types are:

- **Service-Related** — Invoice where the line items specify a quantity and a price, but the quantity times price typically cannot exceed a specific amount. Additionally, the Supplier can enter detail lines that must not exceed the total for the line for the line item.
- **Fixed-Price** — Invoice where the price is fixed and the Supplier enters only a quantity to Invoice. The goods are received via a business standard receiving processes at a receiving dock. Also known as Direct Material Invoice.
- **Variable-Pricing** — Invoice where line items have a quantity and an initial price, but the price can vary with each shipment; for example, oil, grain, steel. The Supplier enters the price and quantity. Also known as Commodity Invoice.

- **Non-receivable** — Invoice where the line item has a fixed price and a specified quantity, but the goods are not received via standard processes. This invoice type can require a requestor acknowledge receipt prior to payment. Also known as Drop Ship Invoice.

- **Mixed** — All other Invoices.

Invoiced (full) or status

The Supplier submitted an Invoice(s) for all quantities against all Order line items, or the system received an EDI Invoice indicating this.

Invoiced (partial) or status

The Supplier submitted an Invoice(s) for some of the quantities or some of the Order line items, or the system received an EDI Invoice indicating this.

Invoiced Qty

Invoiced Quantity

Number of line item units that the Supplier is invoicing you for. This number cannot be greater than the **Open Qty to Invoice**.

Item Total

Sum of the extended line item amounts on the Invoice. The extended line item amount is the unit price of the line item multiplied by the quantity invoiced.

Kitting Details

Displays in the **Order Details** area of the Order. It indicates the Order item contains sub-items. The information that displays is based on what you selected in the **Child Line Item Fields** area in the **Form Edits** section of **Buyer Settings**.

Last Shipment

Indicates if this shipment represents the last items shipped against the Order.

line item

One item on an Order, regardless of quantity. An Order can contain multiple line items. Each line item is independent the other line items. A line item can contain one or more order schedules.

Location

Names of places where products are stored.

Method of Payment

How you are paying the Invoice; for example, **Check**, **Electronic**, etc.

missed commit

A missed commit occurs when a Supplier commits a given part schedule, but the date is not the date you requested for 100% of the net quantity. All ***split commits*** are considered to be missed commits. Also, a part schedule is a missed commit if you change the date or quantity for a previously committed schedule.

Missed Commits

OLV looks for the part schedules in current Orders (acknowledged or not) where the corresponding Order line item does not match the total quantity or arrival date requested. Missed commits include only committed Order line items that contain commit information, and that you did not receive.

Multiple Qty
Multiple Quantity

For products that are sold in unit multiples. If you indicate the product is sold in multiples, the **Multiple Quantity** field identifies how many of this item represent a unit. To determine the extended price, the system divides the quantity ordered by the quantity of the multiple, and then multiplies by the unit price.

Net Days

The number of days you have to pay the Invoice. Invoices that are paid past the indicated **Net Days** are considered late. If you pay within the **Discount Days**, you are eligible for the **discount percentage**.

Net Amount Paid

On a Remittance Advice, the difference between the approved **Invoice Amount** and the **Discount/Adj Amount**.

New Invoice Alert

Select to generate an email when that Supplier submits an Invoice to OLV. The email is sent to all recipients you specify on the User Alerts page.

New Ship Notice Alert

Select to generate an email when that Supplier submits a Ship Notice in OLV. The email is sent to all recipients that you specify on the User Alerts page.

New Overdue Shipment Alert

Select to be notified, by email, when that Supplier has not submitted a Ship Notice by your **Requested Arrival Date**. The email is sent to all recipients that you specify on the User Alerts page.

New SN Alert

Select to generate an email when that Supplier submits a Ship Notice in OLV. The email is sent to all recipients that you specify on the User Alerts page.

New status

Recently web-created Invoice that has not yet been sent to you.

Notes

Enter any additional business information about the order.

Number of Units

Number of Packaging Units.

Number Shown per Page

On any of the Search pages, specify the number of documents to display on each Search Results page.

Open Qty to Invoice

Number of line item units yet to be shipped and invoiced.

Open Qty to Ship

Number of line item units yet to be shipped - **Order Qty** - **Received Qty** = **Open Qty to Ship**.

Order

Purchase Order, or your authorization to formalize a purchase transaction with the Supplier. An Order should state:

- The name, part number, quantity, description, and price of the goods or services ordered
- Agreed-to terms as payment, discounts, date of performance, and transportation
- Any other agreements pertinent to the purchase and its execution by the Supplier

Order Acknowledgment

Accept indicates the Supplier has acknowledged (reviewed) the Order and has agreed to its contents.

Order Acknowledgement Alert

Select to generate an email each time that Supplier has not acknowledged one of your Orders within a certain amount of time. The email is sent to all recipients that you specify on the User Alerts page.

Order Line Number

The identifier of a line item on an Order. Click the number to see line item details.

For a line item in the Invoice, the Order Line No. specifies its corresponding line number in the Order.

Order No.

Order Number

Unique identifier for the Order:

- On the Order Search page, you can specify the Order for which you want to see information. You can enter a:
 - Complete Order Number
 - Partial number (one or more characters) followed by an asterisk (*)
- On the Invoice Search Results and Invoice Header tab pages, the Order from which the Invoice was created.
- On any Search Results page, click the number to see Order information.

Order Qty

Total required quantity for the line item, as specified in the Order.

Order Release No.

An optional field used by some companies to identify an order within a blanket Order.

A *blanket Order* is your long-term commitment to a Supplier for an item against which short-term releases are generated to satisfy requirements. Often, blanket Orders cover only one item with predetermined delivery dates. A blanket Order is synonymous to a standing Order.

order schedule

Each order schedule has a given quantity for a specific date that belongs to the line item that belongs to an Order.

Order Status

On the Order Search page, search for Orders based on their status. For status explanations, see "[Status](#)."

Orders to Acknowledge

Order line items that the Supplier has not yet acknowledged, or that need to be "re-acknowledged" per your request.

Order Total

Total monetary amount you have authorized for all Order line items.

Organization

On the Search page, click the drop-down list to see a list of subdivisions. The corporate-level is at the top on this list. Use this list to see Orders for all divisions, or for a single division.

Out of Stock

On the Inventory Activity page, these fields indicate the number of items that are out-of-stock for that specific time period.

Overdue Commit Alert

Select to be notified by email when that Supplier has failed to enter commitment data within a certain amount of time. The email is sent to all recipients you specify on the User Alerts page.

Overdue Shipment Alert

Select to be notified by email when that Supplier has not submitted a Ship Notice by your Requested Arrival Date. The email is sent to all recipients you specify on the User Alerts page.

Overdue status

This status applies to a firm order that is ***past due***. This status occurs when your Requested Arrival Date is past the current date, which is based on your standard time, and you have not received a Shipping Notice.

Packaging Type

Packaging Units

How the items are packaged for shipment; for example, carton, pallet, etc.

Paid (full) or status

The Hub has paid all Invoices related to the Order, or the system received an RA or EDI 820 stating this.

Paid (partial) or status

The Hub has made some payments related to the Order, or the system received an RA or EDI 820 stating this fact.

Payment No.

Payment Number

Unique identifier for a Remittance Advice. On the Search for Remittance Advice page, you can specify this number to access only that Remittance Advice. Or, you can enter a partial number followed by an asterisk (*).

On any Search Results page, click the number to see Remittance Advice information.

Payment Method

How you are paying the Invoice amount, for example, **Credit Card**.

Pending Shipment Alert

Select to generate an email before a shipment from that Supplier is due. The email is sent to all recipients you specify on the User Alerts page. This is a proactive alert that you might want to send to the Supplier as a reminder.

PO

Purchase Order. This document is your authorization to formalize a purchase transaction with the Supplier. An Order should state:

- The name, part number, quantity, description, and price of the goods or services ordered
- Agreed-to terms as payment, discounts, date of performance, and transportation
- Any other agreements pertinent to the purchase and its execution by the Supplier

Purchase Order

Your authorization to formalize a purchase transaction with the Supplier. An Order should state:

- The name, part number, quantity, description, and price of the goods or services ordered
- Agreed-to terms as payment, discounts, date of performance, and transportation
- Any other agreements pertinent to the purchase and its execution by the Supplier

Reason Code*

For a Remittance Advice, the reason for the *Discount/Adjusted Amount*. To see an explanation for the Reason Code, click the code. The system lists the common EDI ANSI reason codes with a short description.

Received Quantity

The quantity of the part schedule or Order line item that you already received.

release

The authorization to produce or ship parts that you ordered.

Release No.

Release Number

An optional field used by some companies to identify an order within a blanket Order.



A *blanket Order* is your long-term commitment to a Supplier for an item against which short-term releases are generated to satisfy requirements. Often, blanket Orders cover only one item with predetermined delivery dates. A blanket Order is synonymous to a standing Order.

Remit to

Address where the Invoice confirmation or payment is sent. This address could be a combination of physical/street addresses, bank account/routing information (for electronic funds transfer), or lot box related information.

Important: Your organization is responsible for providing and maintaining a list of accurate and approved remit-to addresses for each Supplier so your company's back end/ERP systems accepts the Invoices.

Remarks

Explanatory information and details about the line item. A  next to the amount indicates comments. Click the  to read the text.

remittance advice

Some supply chain trading partners transmit invoice remittance information to their Suppliers.

A *remittance advice* is a document that identifies the invoice settlement date and payment amount and contains information on a payment, such as the receiving bank account and the Invoices that were paid. It shows the details of a Buyer Company payment, which could be for multiple Invoices. Accounts Payable usually generates Remittance Advices for EFT (electronic funds transfer) payments. For a payment by check, the Remittance Advice is the check stub.

Requested Date

Requested Arrival Date

Requested Delivery Date

Requested Ship date

Date you asked to receive the ordered parts from the Supplier.

Requested Quantity

The quantity of the line item you requested in the Order schedule or Order line item.

Retailer

Refers to your Company name and contact information.

Retailer SKU

Number or code you assigned to the line item, or the part number associated with the part schedule or the Order line item.

Revision

The revision level of the part, which indicates the number of changes to the part. The Order might or might not have releases against it.

rules

See ["Invoice rules"](#) and ["Ship Notice rules."](#)

Saved Queries

When doing a search on inventory activity, on your Inventory Activity Search Results page, you can specify to name and save the search criteria you entered. Then, on the Search Inventory Activity page, you can select the query from this list to do the same search.

Schedule Date Range

The starting (**From**) and ending date (**To**) between which you want to see Order Schedules or Ship Notices based on the **Requested Arrival Date**. Enter the dates in the specified format. Or, click the calendar icon to select the dates.

For Shipping Notices or Order line numbers, the system finds those with a Requested Date within the **Date Range** you specify. For Invoices or Remittance Advices, the system finds those with a creation date within the **Date Range** you specify.

Schedule No.

Unique identifier for the Order schedule.

Schedule Type

There are various types of Orders. The status of the Order line item indicates the type of Order:

- **Planned** status — You generate this status. Planned Order line items are for Supplier planning purposes; they contain *forecasted* future requirements. For a planned Order line item:
 - An Order number has not been assigned to the line item.
 - You have not committed to the line item order.
 - You can change the Order line item order details at any time.
 - You can delete the Order line item order at any time.
- **Firm** — The Buyer generates this status. Note that:
 - This is a “true” order that you are requesting that the Supplier is to fill. That is, you are committing to purchase.
 - This Order line item order is for a stipulated period of time.
 - You cannot change the Order line item order details during the stipulated time period.
 - The Supplier has not yet committed to the Order line item order.
 - The Order line item has an assigned Order number.
- **Overdue** — Applies to Firm orders that are past due. This status occurs when your Requested Arrival Date is past the current date, which is based on your standard time, and you have not received a Shipping Notice.

Settlement Date

Date on the Remittance Advice that specifies when you made the payments included in the advice.

Ship from Address

Location of the items being shipped.

Ship Notice Number

Shipping Notice Number

The Supplier's Invoice number or other unique identifier for the shipment.

Ship Notice rules

Ship Notice rules are set by the Company Administrator.

Rule	Select rule to . . .
A Ship Notice cannot have more than one Product ID or part number	<p>Ensure Suppliers create a Ship Notice where, for each line item entered, the product IDs or part numbers are the same. Otherwise, the Ship Notice line items can contain different product IDs or part numbers.</p> <p>Example: The Supplier enters a shipment quantity for two different Order schedules, one where the Part Number is 123, the other where the Part Number is 456. If this rule is:</p> <ul style="list-style-type: none"> ■ On (selected), OLV gives the Supplier an error message stating "All part numbers must match on this ASN," and the Notice is not submitted to you. ■ Off (not selected), OLV submits the Ship Notice to you.
A Ship Notice cannot contain line items with different Ship-To addresses	<p>Ensure Suppliers create a Ship Notice where all line items are shipped to the same address. Otherwise, the Supplier can ship different line items to different addresses. OLV does not check the addresses, but you are asked to select a single address for OLV to map for the Ship Notice/ The single address that you select is the only address viewable in the EDI translation.</p> <p>Example: The Supplier, enters a shipment quantity for two different Order schedules, one with an address of 100 Edison Park Drive, the other with an address of 1600 Pennsylvania Avenue. If this rule is:</p> <ul style="list-style-type: none"> ■ On (selected), OLV gives the Supplier an error message stating "All ship-to address must match on this ASN," and the Notice is not submitted to you. ■ Off (not selected), OLV submits the Ship Notice to you.
A Ship Notice cannot contain line items from multiple Orders	<p>Ensure Suppliers create a Ship Notice for line items in only one Order. Otherwise, the Supplier can enter line items from multiple Orders in the Ship Notice.</p> <p>Example: The Supplier searches the database for all Orders that need to be shipped and enters Ship Notice information. If this rule is:</p> <ul style="list-style-type: none"> ■ On (selected), OLV gives the Supplier an error message stating "Your Ship Notice cannot include quantities against multiple Orders," and the Notice is not submitted to you. ■ Off not selected), OLV submits the Ship Notice to you.
A Ship Notice cannot be created with a date in the past	<p>Ensure Suppliers enter a current or future date into the Shipping Date field. Otherwise, the Supplier can enter any past, current, or future date in the Shipping Date field.</p> <p>Example: The current date is June 15 and the Supplier creates a Ship Notice with a Shipping Date of June 10. If this rule is:</p> <ul style="list-style-type: none"> ■ On (selected), OLV gives the Supplier an error message stating "Ship Notice Date" cannot be in the past, and the Notice is not submitted to you. ■ Off (not selected), OLV submits the Ship Notice to you.
A Ship Notice cannot contain lines previously flagged with "Last Shipment" indicator	<p>Ensure Suppliers do not create a Ship Notice for line items where 100% of the quantity has been shipped.</p>

Rule	Select rule to . . .
Limit by SN scheduled quantity - Tolerance nn %	<p>Ensure Suppliers enter a Ship Quantity that equals the Requested Quantity plus a specified Tolerance (percentage of requested quantity). Otherwise, the Supplier can enter any Ship Quantity, even one that exceeds your Requested Quantity.</p> <p>Example: The Requested Quantity is 100 and the Tolerance is 10%. The Supplier creates a Ship Notice with a Ship Quantity of 111. If this rule is:</p> <ul style="list-style-type: none"> ■ On (selected), OLV gives the Supplier an error message stating “Shipment Quantity cannot exceed Requested Quantity,” and the Notice is not submitted to you. ■ Off (not selected), OLV submits the Ship Notice to you.
Limit by SN received quantity - Tolerance nn %	<p>Ensure Suppliers enter a Ship Quantity that equals the Open Quantity to Ship plus a specified Tolerance (percentage of open quantity). Otherwise, the Supplier can enter any Ship Quantity, even one that exceeds or is less than the Open Quantity to Ship. Selecting this rule tells OLV to calculate the Open Quantity to Ship based on the quantity received, rather than the quantity the Supplier shipped. These quantities can differ due to loss-in-transit, damage, shrinkage etc.</p> <p>Example: The Requested Quantity is 100, Open Quantity to Ship is 100 and the Tolerance is 10%. The Supplier enters SN#1 with a Ship Quantity of 80, and Buyer sends in a receipt quantity of 75. Then, in SN#2, the Supplier enters a final Ship Quantity of 20. If this rule is:</p> <ul style="list-style-type: none"> ■ On (selected), OLV calculates the Open Quantity to Ship to be 25 and rejects the Ship Notice. ■ Off (not selected), OLV calculates the Open Quantity to Ship to be 20 and accepts the final Ship Notice. <p>Important If you select this rule, you should also select the Limit invoice by receipt quantity - Tolerance nn % <i>Invoice rule.</i></p>
No rules	Select this option to place no ship quantity restrictions on the Supplier.

Ship Quantity

The number of parts in this shipment. The number should not exceed your requested quantity minus the Total Shipped Quantity.

Ship to Address

Location to which the items are being shipped.

Ship-to-Location ID

A Buyer-assigned code identifying one of their shipping destinations; for example a distribution center or store.

Shipped

Shipped (WTD)

Shipped (num Weeks ago)

Number of items that were shipped.

Shipment Date

The date the order is to ship.

Shipment Time

The time of day the order is to ship.

Shipped (full) or status

All of the quantities for all Order schedules were shipped, or the system received an EDI Shipping Notice document stating complete shipment.

Shipped (partial) or  status

Some quantities or some Order schedules have been shipped, or the system received an EDI Shipping Notice document stating this.



SKU Number

The Buyer-assigned Stock Keeping Unit identification number used in inventory management.

SN Alert

Select to generate an email when that Supplier submits a Ship Notice in OLV. The email is sent to all recipients that you specify on the User Alerts page.

Special Charges

An optional or additional charge the Supplier is charging for a specific line item within an Invoice. A  next to the amount indicates that the Supplier made comments specifically about this charge. Click the  to read the text.

A **Special Charge** is added to the Invoice line item total.



split commit

A split commit is when the Supplier cannot guarantee the entire quantity on a given date, but is tied to a single part schedule. All split commits are considered to be missed commits.

standing Order

See ["blanket Order."](#)

Status

Status	Icons and explanation
Acknowledged	<p>Supplier acknowledged the Order by accepting or rejecting it, or the system received an EDI Order Acknowledgement.</p> <ul style="list-style-type: none"> ■  Acknowledged and accepted. ■  Acknowledged but rejected. ■ Acknowledgment not required. ■ Acknowledged, but neither accepted nor rejected.
Committed	<ul style="list-style-type: none"> ■ Fully committed. Supplier entered all the required commitment data for the Order. ■ Partially committed. Supplier entered some, but not all of, the required commitment data for the Order. ■ Fully missed. Supplier did not fulfill any of the commitment promise. ■ Partially missed. Supplier did not fulfill all of the commitment promise.
Credit	<ul style="list-style-type: none"> ■ Partial credit. Supplier entered a partial credit against the associated Invoice. ■ Full credit. Supplier entered a complete credit against the associated Invoice.
Deleted	<ul style="list-style-type: none"> ■ Status occurs when you delete either the Order or the Requested Quantity for a part schedule or Order line item.

Status	Icons and explanation
Firm	<p>You generate this status:</p> <ul style="list-style-type: none"> ■ This is a “true” order that you are requesting the Supplier to fill. That is, you are committing to purchase. ■ This Order line item order is for a stipulated period of time. ■ You cannot change the Order line item order details during the stipulated time period. ■ The Supplier has not yet committed to the Order line item order. ■ The Order line item has an assigned Order number.
Invoiced	<ul style="list-style-type: none"> ■ Fully invoiced. Supplier submitted an Invoice(s) for all quantities against all Order line items, or the system received an EDI Invoice indicating this. ■ Partially invoiced. Supplier submitted an Invoice(s) for some of the quantities or some of the Order line items, or the system received an EDI Invoice indicating this. ■ Previously invoiced. There is a previous Invoice(s) against this Order.
New	Recently web-created Invoices that have not yet been sent to you.
Overdue	Applies to Firm orders that are past due. This status occurs when your Requested Arrival Date is past the current date, which is based your standard time, and you have not received a Shipping Notice.
Paid (full)	<ul style="list-style-type: none"> ■ Fully paid. You or your Hub has paid all Invoices related to the Order, or the system received an RA or EDI 820 stating this. ■ Partially paid. You or your Hub has made some payments related to the Order, or the system received an RA or EDI 820 stating this.
Planned	<p>You generate this status. Planned Order line items are for Supplier planning purposes; they contain forecasted future requirements. For a planned Order line item:</p> <ul style="list-style-type: none"> ■ An Order number has not been assigned to the line item. ■ You have not committed to the line item order. ■ You can change the Order line item order details at any time. ■ You can delete the Order line item order at any time.
Shipped (full)	<ul style="list-style-type: none"> ■ Fully shipped. All quantities for all Order schedules were shipped, or the system received an EDI Shipping Notice document stating complete shipment. ■ Partially shipped. Some quantities or some Order schedules have been shipped, or the system received an EDI Shipping Notice document stating this.
Submitted	Invoices that were sent.
Viewed	Supplier opened the Order on the web, or the system received an EDI functional acknowledgement.

Stock Condition

On the Search Inventory Activity page, search for a product that is based on its stock status.

Sub Contractor

On the Order, the name of the Supplier's company.

In a Remittance Advice, the Supplier's contact information.

Submitted status

The Invoice was sent to you or your Hub.

Supplier

On the Order, the name of the Supplier's company.

In a Remittance Advice, the Supplier's contact information.

Supplier Catalog Number

Supplier Part Number

Supplier's catalog number for the Order line item or the part schedule.

Supplier Item ID

The alphanumeric value the Supplier uses to identify a particular product.

Supplier Code

The specific business partner relationship code that you assigned the Supplier. Each Supplier has a unique company code within your company system.

Note: If the Supplier company has different branch locations, you might have assigned multiple Codes, with each Code representing a different branch location.

Supplier Number

The Vendor Number you assigned when you approved the Supplier as a Trading Partner.

Supplier SKU

The Supplier-assigned Stock Keeping Unit identification number used in inventory management.

Supplying Company

On the Order, the name of the Supplier's company.

In a Remittance Advice, the Supplier's contact information.

Tax Amount

Total tax amount for the goods being invoiced.

Taxable

Whether or not the line item is a taxable product.

Terms Description

Short description of the sale terms, for example, **Net 30**.

Terms Start from

Code identifying the date when the terms of sale begin.

- **1** - Ship date
- **2** - Delivery date
- **3** - Invoice date

Time Zone

For a Shipping Notice, the time zone that applies to the **Shipment Time**.

Total Amount

For a Remittance Advice, the sum of all amounts paid in the advice.

Total Shipped Qty

The total quantity the Supplier shipped for the specific parts schedule or Order line item. This number is:

- Never less than your *Requested Quantity*, because the system assumes the Supplier shipped the Received Quantity.
- Equal to the **Received Quantity** plus any quantity in transit; that is, any quantity that the Supplier has shipped but you have not yet received.

TransOrder Number

The voyage, trailer, or flight number.

TransOrder Method

How the items are being shipped; for example, Rail, Air, etc. **Mutually Defined** indicates you and the Supplier discussed this and agreed on the shipment method.

Unit Price

The price of the line item, per unit. The unit is specified in the **UOM** field, and the dollar type is specified in the **Currency** field.

UOM

Unit of Measure, which is the type of measure for the item; for example, **EA** for each, **DZ** for dozen. Ordering and shipping are based on this type of unit.

UPC

Number or code you assigned to the line item. The part number associated with the part schedule or the Order line item.

Vendor

On the Order, the name of the Supplier's company.

In a Remittance Advice, the Supplier's contact information.

Vendor Code

Vendor ID

The specific business partner relationship code you assigned the Supplier. Each Supplier has a unique company code within your company system.

Note: If the Supplier company has different branch locations, you might have assigned multiple Codes, with each Code representing a different branch location.

Vendor Item ID

Supplier's catalog number for the Order line item or the part schedule.

Viewed or status

Supplier opened the Order on the web, or the system received an EDI functional acknowledgement.

Weight

Weight of the total shipment. When creating a Shipping Notice, remember to select the **Unit of Measure** and **Weight Type**.

Weight Type

Type of shipment weight, for example, gross or net. **Mutually Defined** indicates you and the Supplier discussed this and agreed on the weight type.

Active Documents classic is the previous version of Active Documents. This is the version you will use if you do not have access to the Active Documents tab in Trading Grid Online.

Topics include:

- ["Enable the Active Documents Dashboard"](#)
- ["Search for Transactions"](#)
- ["Search Results"](#)
- ["Transaction Process Lifecycle — Classic"](#)
- ["Transaction Process Lifecycle — New"](#)
- ["Scheduled Reports"](#)
- ["Delivered Reports"](#)
- ["Glossary"](#)

Enable the Active Documents Dashboard

When you first use Active Documents Classic, the Active Documents Dashboard on your *Operations Center* page might be minimized. Display it the way you would display any minimized page.

However, if the Active Documents Dashboard is not minimized or displayed, you must perform the steps in this topic.

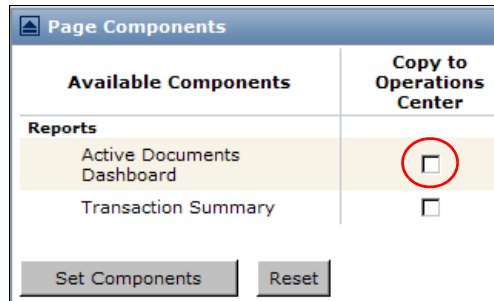
Otherwise, go ahead and ["Use the Active Documents Dashboard."](#)

Or, to work directly with your documents, click the **Reports** tab.

To enable the dashboard, do the following.

- 1 On the *Operations Center* page, click the **Configure** icon.
The **Configure This Page** area opens.

- 2 Click the **Page Components** title bar to open that area.



In the **Copy to Operations Center** column, click the **Active Documents Dashboard** check box > **Set Components**.

The Active Documents Dashboard is added to the **Configure This Page** area.

- 3 (Optional) In the **Active Documents Dashboard** row, remove the check in the **Minimize** column check box to deselect the Minimize option, unless you want the Dashboard to display in a minimized state. (You can maximize the Dashboard manually.)
- 4 (Optional) If you want the **Active Documents Dashboard** to display above the **Message Center** on the Operations Center page, in the **Order** column, change the values to **1** for the **Active Documents Dashboard** and **2** for the **Message Center**.
- 5 Click **Apply**.
- 6 Trading Grid re-configures the *Operations Center* page and displays the Active Documents Dashboard.

Use the Active Documents Dashboard

An Active Documents Dashboard provides links to quickly view activity in a number of categories, such as communication errors, and drill down for more information in a category of errors or processing.

To view your Active Documents Dashboard, click the **Operations Center** tab.

The contents of the Dashboard display in part based on the GXS services that you subscribe to (for example, extended event information) and your Trading Grid implementation.

Depending on your role and subscription options, your Trading Grid service includes one of two Dashboard types.

Most Managed Services customers will see this type:

Active Documents Dashboard		
Select Date: 02/03/2012 - 02/01/2012		
Inbound	Outbound	Acknowledgements
Communication Errors:0	Communication Errors:0	Not acknowledged:4
Processing Errors:9	Processing Errors:0	Late acknowledgements:4
Negative Status Alerts:0	Negative Status Alerts:0	
Extended Errors:0	Extended Errors:0	
	Unextracted files:6	

And, most Trading Grid Messaging Services customers will see this type:

Operations Center		
Active Documents Dashboard		
Refresh	Mailbox #: AAF63028	Time Frame: Last 24 hrs
	Inbound	Outbound
Summary		
Recent Transactions:	3	47
Extracted Transactions:	2	13
Unextracted Transactions:	1	27
Errors		
Communication Errors:	0	0
Rejected Transactions:	0	2
Interconnect Rejects:	0	n/a
Processing Errors:	0	2
Acknowledgments		
Not acknowledged:	n/a	2
Late acknowledgements:	n/a	0

The **Inbound** and **Outbound** columns organize the information by transmission direction. Each column lists types of information, such **Communication Errors** and **Not Acknowledged**, and the number of current records for each type of information (for example, the number of communication errors). Other categories are:

Category	Description
Negative status alerts	If set up by an administrator.
Extended errors	These are errors related to <i>extended events</i> , which your company can publish to GXS from your back end system. For example, your system might detect that a file failed to reconcile and report that to GXS. This type of information displays in Active Documents if you subscribe to the Extended Event service.

Category	Description
Unreconciled Extended Events	During transaction processing, Trading Grid did not receive all events from a business unit that subscribes to the Extended Event service.
Unreconciled GXS Events	During transaction processing, Trading Grid did not receive all events that occur on the GXS side of processing.
Unextracted Transactions	Files not picked up by trading partners.
Extracted Transactions	Files picked up by trading partners.
Acknowledgements	Files that trading partners have not acknowledged or for which acknowledgments are late.
Recent Transactions	Total of Extracted, Unextracted, and Rejected Transactions in the selected Time Frame.
Rejected Transactions	Outbound files rejected by trading partner, or inbound files rejected by customer.
Interconnect Rejects	Inbound only; files from a third-party VAN, for example, that are rejected at GXS. This service will be available in a coming release.

A number greater than 0 indicates a live text link that you can click to view more information. It is the quantity of errors of that type (for example, Communication Errors) for the company during the selected time period.

Click a text link to begin drilling down into data. Sections below provide more details about drilling down and using the Select Date selector.

To update the counts on the Dashboard at any time, click **Refresh**.

See the following for more information:

- [“Change the Reporting Time Period”](#)
- [“Select a Mailbox” on page 434](#)
- [“View Dashboard Information” on page 434](#)
- [“Save a PDF of the Dashboard” on page 435](#)
- [“Print the Active Documents Dashboard” on page 435](#)

Change the Reporting Time Period

By default, the Active Documents Dashboard displays exceptions and activity for the past three days or 24 hours, depending on your Trading Grid service.

To change the time period

- 1 Do one of the following:
 - At the top of the Dashboard, if the **Select Date** drop-down list displays, select a different three-day time range to report.
 - At the top of the Dashboard, if the **Time Frame** drop-down list displays, select an option from the list — the last 24 or 48 hours, or a three-day time range before that.

The Dashboard values are updated via data from the selected time range.

Select a Mailbox

Your Trading Grid service might let you select a specific GXS mailbox on the Active Documents Dashboard. The Dashboard then displays counts for transactions associated only with the selected mailbox.

To select a different mailbox to apply to the Dashboard

At the top of the Dashboard, in the **Mailbox #** drop-down list, click a mailbox identifier.

View Dashboard Information

The information displayed by the Dashboard depends on your Trading Grid service.

To view dashboard information

- 1 Click the **Operations Center** tab.
- 2 On the Active Documents Dashboard, do one of the following:

To view	Do this	Comments
Error information	In the Inbound or Outbound column, do one of the following: <ul style="list-style-type: none"> ■ Click the Communication Errors, Processing Errors, or Extended Errors text link, for example. ■ Click the number link for the error type and transmission direction that you want to view. The number represents the number of errors of that type and direction for the selected mailbox. 	
Negative Status Alerts	in the Inbound or Outbound column, click the Negative Status Alerts link.	Your Trading Grid service might support negative status alerts of errors or events that fail to occur during transaction processing
Un-reconciled Event information	in the Inbound or Outbound column, click the Un-reconciled Extended Events or Un-reconciled GXS Events text link.	Un-reconciled events indicate that Trading Grid did not receive all events during transaction processing. Events might occur on the GXS or customer ("extended") side of processing.
Acknowledgment information	Do one of the following, depending on which is available: <ul style="list-style-type: none"> ■ In the Acknowledgments column, click either: <ul style="list-style-type: none"> ■ Not acknowledged to see all transactions not yet acknowledged. ■ Late acknowledgments to see only unacknowledged transactions that are late. ■ In the Outbound column, click the number link for the two acknowledgment categories. 	Accounts that send EDI data might track whether or not acknowledgments confirming receipt of the data are received. To do so, they subscribe to the Active Documents - FA Management service that displays the number of unacknowledged files and overdue acknowledgments. In most cases acknowledgments are considered late when they are not returned within 24 hours. However, you might have a different late acknowledgment period.

- 3 Click a dashboard link to open the Reports tab and view the list of Partners and associated addresses that meet the dashboard criteria.

The **Error Count** or **Count** column shows the number of files of the selected category and direction for each partner in the list.

- 4 In the **Partner Name** column, click the link for the partner transactions you want to review.

A new page lists the file(s) for that partner. The list includes file information, such as sender and receiver identifiers, APRF (document type), and creation date and time.

- 5 In the **GXS Ref. No.** column, click an identifier link to drill down into that file. The Processing Lifecycle page opens. You can:
 - In the **Error Status** section, click the **View List** link.
The Specific Errors List popup displays error information.
 - Scroll to the **Status Alerts** section to view information.
 - Examine event or acknowledgement information in the lifecycle. For lifecycle information, see the "[FA Information.](#)" section.

Save a PDF of the Dashboard



To save a PDF of basic information in all categories on the Active Documents Dashboard, click the Adobe PDF icon above the Dashboard. Rollover text varies by implementation:

- **MS Dashboard PDF Download**
- **Active Documents Dashboard**

When the **File Download** dialog opens, click **Open** or **Save** to open or save the file.

Print the Active Documents Dashboard

This functionality is not available in all implementations.



To print the Dashboard, click the **Print** icon.



If a **Print** icon is not available, click the **MS Dashboard PDF Download** icon, then in the dialog box, click **Open**. When the file opens, print it.

Search for Transactions

All data formats — for example, EDI, XML, and user-defined formats — are initially processed as files. You can refine search criteria in different ways, depending on if you search tracking data at the file, interchange, or document level.

There are three areas on any Search page.

- Filter area — Filter the search based on an address, transmission direction, or other criterion, or apply a saved search that contains filter and other settings.
- Tracking data area — Specify tracking data at the file, interchange, or document level.
- Actions area — Click **Search** and **Clear** to perform the search or clear the search fields.

When using Search, to view a field description:



- Look up the field in the "[Glossary](#)" on page 464.
- Click the blue information icon to the right of the field, if present.

Click **Reports** tab > **Search** to search for documents. You can search for tracking data in Active Documents for 90 days after the document processes. The physical files are archived. Contact GXS to request copies of data over 90 days old.

Note: Based on your subscription permissions, you might see some or all of these functions. Search options include:

- ["Configure the Search Page" on page 436](#)
- ["Begin Searching" on page 436](#)
- ["Search on Keys" on page 438](#)
- ["Search for Related Documents" on page 439](#)
- ["Group Search Results" on page 439](#)

Configure the Search Page

To configure the Search page

- 1 Click the **Reports** tab.
- 2 On the Active Documents Search page, at top right click the **Configure** icon. The Configure Search Page panel displays.
- 3 In the **Used Search Criteria** section, deselect check boxes for search levels you do not use. Those levels no longer display on the Search page.
Important: This is not recommended if you exchange EDI data.
- 4 In the **Default Search Criteria** section, select a default search level that automatically displays when displaying Search. For example, if you select Document, the Search page displays the Document search criteria by default.
- 5 To search on primary and secondary keys in a **File** search, select the **Use primary and secondary key for file search** option. (This is available by default in **Document** searches.)
- 6 Click **Apply**. Trading Grid re-configures the Search page.

Begin Searching

Define a New Search

To begin a new search

- 1 To define a new search, first set up your filter parameters. Filter parameters are:

Parameter	Description
GXS Ref No	Unique number created at GXS to track documents.
Your EDI address and/or one or more Partner Address(es)	Separate multiple addresses with a comma.
Specific partner name(s)	Separate multiple names with a comma)
Mailbox	Specific GXS mailbox, or leave All selected. (TGxx, GXS only).
Direction	Only files that you sent, or you received, or both.

- a Enter any parameter criteria.
- b To return files for a specific time period, in the **Time Frame** drop-down list select one of the following options:

Option	Description
Specific No. of Days	In the Last X No. of Days From and To fields type the most recent number of days to search and the start and end times for those days. For example, search from 5 days ago to 3 days ago, beginning at 00:00:00 the first day and ending at 11:59:59 on the ending day.
Specific Date Range	In the From and To fields enter a start date and time and an end date and time. Click the calendar icon to open a dialog where you can select a date.
Relative Time Range	In the From drop-down list, select the beginning of the time period, such as Monday of Last Week or First of this Month , and in the next drop-down list select a time of that day. In the To drop-down list, select Today or Yesterday and select a time on that day for the end of time period.
None	Do not use a Time Frame to restrict the search. If you select None , Active Documents searches the past 90 days of tracking data. This might delay results. Results might exceed the maximum number of records that the system displays.

- 2 Select a **Tracking Data Level**. Tracking data consists of information at the file (system default), interchange, or document level.

Select one:

Tracking Data Level	Description (can vary by GXS implementation)
File	Data translated to or from one non-EDI data format to another non-EDI data format, or data processed as a pass-through (without translation). Options might include searching for files with or without errors, negative alerts, or other events.
Interchange	EDI-formatted data reporting activity at the interchange level.
Document	EDI-formatted data reporting activity at the document level, or XML-formatted data processed with XML document identification. Options include viewing related documents (for example, Invoices related to Purchase Orders searched for).

Search options vary by tracking data level. For example, at the document level, you might search for a **Document Type**.

- 3 Based on your selection in the previous step, the page redisplay with the applicable fields. Enter data in these fields as needed.

For field information, see the [“Glossary” on page 464](#).

- 4 (Optional) If your Trading Grid service lets you
 - Search for documents that are related to the documents returned by the original search. See [“Search for Related Documents” on page 439](#).
 - Configure the Search page to search for files as well as documents by Primary Key and Secondary Key. See [“Search on Keys” on page 438](#).
 - Group file search results. See [“Group Search Results” on page 439](#).
- 5 Click **Search**.
- 6 Go to [“Search Results” on page 440](#).

Note: After viewing your search results, you can [“Save all Search Criteria” on page 442](#) for future use.

Use a Saved Search

You can use a search that you or someone else has saved.

- 1 Click the **Reports** tab.
- 2 If that tab is already selected but the Search page is not displayed, on the left side of the page, click **Search**.
The Active Documents Search page opens. Search options vary among GXS services subscribed to.
- 3 Click **Select Saved Searches** drop-down > name of the saved search > **OK**.
The page refreshes to display the search parameters.
Note: You might see searches saved by other members of your organization. They are organized by user, beginning with you.
- 4 Change the parameters for this search, if needed. Click **Clear** to clear all search fields.
- 5 To delete a saved search, click **Delete**.
The saved search disappears from the drop-down list.
- 6 Click **Search**.
- 7 Go to [“Search Results” on page 440](#).

Search on Keys

Your Trading Grid service might enable you to target a document search by using primary and secondary keys, or only by primary keys. These are data keys such as **PO Number** and **SAP IDOC Number** or **Type**.

You might also be able to modify the Search page to allow key searches at the file tracking level. See [“Configure the Search Page” on page 436](#).

To search on keys

- 1 In the **Primary Key** and/or **Secondary Key** fields type the first character(s) of the key type. For example, for Purchase Order Number you could type **P**.
TGMS users — always type **D** or **doc** for document. This applies to any type of document identification number (Purchase Order Number, Invoice Number, Ship Notice Number, etc.) that you will enter in the next step.
- 2 When Active Documents displays available options (**PO Number**, **Product ID**, etc.), click one to insert it in the field.

TGMS users — select **DOCUMENT ID** for any type of document identification number (Purchase Order Number, Invoice Number, Ship Notice Number, etc.) that you are entering in the next step.

- 3 In the **Primary Key Value** and/or **Secondary Key Value** fields, type the specific value to search for the selected key. For example, type the actual **PO Number** or **Product ID** to use in the search.

In the **Value** field, if you type a partial key value followed by an asterisk (*), the system searches for any files or documents with the selected key value that begins with that sequence of characters.

Search for Related Documents

Your Trading Grid service might allow you to search for documents that are related to the documents returned by the original search. For example, you can search for 810s related to the 850s returned by the search.

To search for related documents

- 1 In the **Document Type** field, type the document type(s) on which to base the related documents search. Separate multiple document types by commas. For example, type 850 to search for documents related to one or more 850s.
- 2 (Optional) To further define the source document, for example, search for documents related to a specific 850, use the **Primary Key** and **Secondary Key** fields to target that 850. See [“Search on Keys” on page 438](#).
- 3 Select the **Related Documents** check box. The **Related Document Type** field displays.
- 4 Do one of the following:
 - To display only specific type(s) of related documents (for example, 810s), type that ID in the **Related Document Type** field. You can enter multiple types separated by a comma.
 - To return related documents of all types, leave the field blank.

Group Search Results

Your Trading Grid service might allow you to group search results by address (Sender or Receiver ID), time interval, and other criteria. This can make it easier to analyze search results that include many records.

You can define the order in which to apply criteria to the search results. For example, Active Documents could sort search results first by partner name, then within each partner group by document type, then within each partner group and document type by time interval, etc.

The **Group Result By** option is available at all levels of Search.

To group search results

- 1 In the File, Interchange, or Document tracking data area of the Search page, select the **Group Result By** check box.
 New fields display below the check box.
- 2 Use the drop-down lists to specify the order in which to apply criteria to sorting the list, and to omit criteria from sorting.
 For any field you want the sort to ignore, select **Consolidate** for that field.

For example, sort **1st** by My Address, **2nd** by Partner Name, and select **Consolidate** for the Time Interval. Your results will be sorted by **Partner Name** within **My Address**.

Search Results

The Search Results page displays the applicable files, documents, or interchanges based on your search criteria.

Note: Some columns display only in a downloaded file, not in the user interface.

Configure the Search Results Page

You can configure the search results page for each transaction level (file, interchange, and document). This enables you to display additional data as columns on a page or in an output file.

To configure the Search Results page



- 1 On the Search Results page, in the Reports bar, click **Configure**.
A panel displays the options for the Search Results page.
- 2 Do the following:

To . . .	Do this . . .
Add a column	Click Add Column > select the column > OK . The column name is added to the list. For example, add a column for Functional Group Sender and/or Receiver for document-level searches. An asterisk (*) after a column name in the Add Column drop-down indicates that the column displays only in scheduled reports, not on the search results page. A plus symbol (+) after a column name indicates that the column displays only for search results with a Status of Incomplete or With Errors .
Remove a column	Click the X next to the column name. (The white X turns red when your mouse pointer touches it.) The column name disappears from the list.
Move a column	Click the column name and drag it to a different place in the list.
Change the default sorting method	In the Sort By drop-down list, select a different column to use for sorting.
Change the number of results that display on a page	In the Lot Size drop-down, select a different number.

- 3 Click **Submit** (for a new search) or **Update Saved Search** (for a saved search). Trading Grid refreshes the page.

For a saved search, Active Documents uses the new display settings in future searches.

To close the panel without submitting or updating, click the **X** at top right.

View the Results

From the Search Results page, you can also view

- [“Results with More than 1000 Records” on page 441](#)
- [“Grouped Results” on page 441](#)
- [“View Related Documents” on page 441](#)
- [“Drill Down into Data” on page 442](#)
- [“Print and Save Results” on page 442](#)
- [“Save all Search Criteria” on page 442](#)

Results with More than 1000 Records

For searches that return more than 1,000 results, the system displays the first 1,000 found.

To view the remaining results

- 1 Click **Generate Report** above the table. A dialog opens.
- 2 In the dialog create a scheduled report as described in [“Save/Schedule/Send Reports” on page 460](#).

Note:

- To view the search criteria without returning to the Search page, click the **View search criteria** link at upper right.
- If you use a **Specific Date Range** in the **Time Frame** option, you must select **Now** in the dialog and generate a one-time report, not a scheduled report.

Grouped Results

When you use groups to organize large search results, the Search Results page displays a **Count** column that lists the numbers of documents found for each group in the search results.

Click a number link in the **Count** column to view details for the group of search returns in that row of the Search Results table.

View Related Documents

If your Trading Grid service supports viewing documents related to the documents found in a search, use this procedure to view the related documents.

To view related business documents

- 1 On the Search Results page, click the **View Related Business Documents** icon.
The Related Business Documents page opens.
- 2 To view related documents in a specific document type, click the number link under the icon for that document type.
For each applicable document type, a table displays basic details for related documents of that type.
- 3 To view the process lifecycle or related documents for a document on the page, use the icons as described in [“Drill Down into Data” on page 442](#).

Drill Down into Data

To access specific data, in the **GXS Ref No.** column of the Search Results table:

- For file searches, click a file link to see its processing history and file contents.
- For interchange searches, click the interchange link to view.
- For document searches:
 - Click the **View Process Lifecycle** icon to view document processing information. See [“Transaction Process Lifecycle — Classic” on page 443](#).
 - Click the **View Related Business Documents** icon to view basic information about documents related to the document in the Search Results. See [“View Related Documents” on page 441](#).

Print and Save Results

On the Search Results page:

- To print the results, click **Print**, then in the dialog that opens click the icon again.
- To save or view the results as a PDF file, click **PDF** and follow the prompts.
- To save or view the results in an Excel spreadsheet, click **CSV** and follow the prompts.
- To view the search criteria that created the results, click the **View Search Criteria** link.

Save all Search Criteria

You can save search criteria (also called *report query*) to use again later so you do not have to recreate the search.

A saved search and any scheduled report run from that search uses the column and column ordering preferences in the Configuration (also called *Personalization*) panel when you save the search. To set display preferences for a search, see [“Configure the Search Results Page” on page 440](#).

To save search criteria

- 1 To save your search criteria for a future search, on the bottom right of the Search Results page, click **Save/Schedule Report**.
- 2 In the dialog that opens, in the **Name** field type a unique name for the search, for example, “ABC Inc., 810.”

Note:

- To prevent report duplication, if the search criteria includes a **Specific Date Range**, you must select the **Now** option. This generates an immediate, one-time report, not a regular scheduled report. See also [“Save/Schedule/Send Reports” on page 460](#).
 - To schedule a regular report based on this search, see [“View Scheduled Reports.”](#)
- 3 Click **Save**.

Transaction Process Lifecycle — Classic

Important: There are two lifecycle displays — “classic” and “new.” The “classic” is the established Active Documents lifecycle. The other is not a “new” lifecycle per se, it simply displays the same data in a new, easier-to-navigate format. You can easily display either lifecycle — see [“Enable the “Classic Lifecycle” Option” on page 443](#) or [“Enable the “New Lifecycle” Option” on page 452](#).


Active Documents captures the processing history of files, EDI interchanges, EDI documents, and XML documents as they pass through various tracking points.

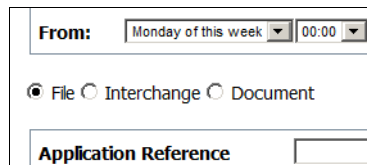
Processing lifecycle details provide information about a specific transaction at key processing points in each environment. The points that display in the lifecycle history depend on the path the transaction follows during its lifecycle.

Note: The Transaction Processing Lifecycle can provide visibility into both internal and Managed Services processes in one view. You may have the option to publish *edge events* to Active Documents . Edge events are transactions from a customer’s internal system, such as SAP (an ERP system).

Enable the “Classic Lifecycle” Option

You can easily toggle between the Classic Lifecycle and the New Lifecycle.

- 1 Find the transaction to examine. See [“Search for Transactions” on page 435](#).
- 2 On the Search Results page, in the upper right corner of the listing, click the  (Configure icon).
- 3 For the **Show New Lifecycle View** option, select **No**.



The screenshot shows a configuration form with the following elements:

- From:** A dropdown menu set to "Monday of this week" and a time dropdown set to "00:00".
- Radio buttons for **File** (selected), **Interchange**, and **Document**.
- An **Application Reference** text input field.

- 4 Click **Submit**.

Use this procedure to toggle between the “new” and “classic” lifecycle.

View a Process Lifecycle

To view a process lifecycle

- 1 Find the transaction to examine. See [“Search for Transactions” on page 435](#).
- 2 If necessary, [“Enable the “Classic Lifecycle” Option” on page 443](#).
- 3 On the Search Results page, click the **View Process Lifecycle** icon.

The Processing Lifecycle page displays the processing history of the file, interchange, or document.

Icons represent a processing stages that is detailed in a box lower on the page. The icon displays in the title bar of the processing stage, which is a platform, translator, application, or other service used to process the transaction.

Hover your cursor over a processing stage icon to display a description of that processing stage.

For example, these icons

represent **Managed Service Platform > Translation Service > Managed Service Platform**, respectively.

If an icon includes a red box containing an X, that processing stage failed.

To jump to a processing stage, click that icon.

The Processing Lifecycle page includes several sections, depending on the number of processing stages. Some sections enable you to drill down into the data. See the links under "[Transaction Process Lifecycle — Classic](#)" on [page 443](#).

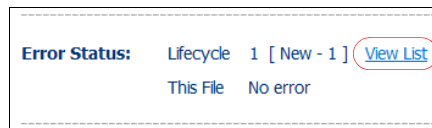
Error Information

If the processing lifecycle contains error information for the lifecycle process or a file, a **View List** link displays in Error Status section near the top of the page. This enables you to drill down into information about errors in processing, which could be an invalid address, decryption error, or others.

The **Error Status** section might display an **Update Status** link. To use this feature, see "[Update Error and Event Statuses](#)" on [page 444](#).

To view errors in a lifecycle or file

- 1 Scroll to the **Error Status** section. If errors exist, the numbers next to **Lifecycle** and **New** indicate the quantities of error of that type.



- 2 To view error information, click **View List**.

The Specific Errors List popup displays error information for the lifecycle or file.

Error Code	Error Source	Error Text
503	AI	Conditional Error- Required (at least one must be present)- DTM_6_02_373, DTM_6_03_337, DTM_6_05_1250 Tag in Error: DTM_6~ ~DTM_6_02_373
506	AI	Attachment Error#- 993 - , On- LOGANo850FFbs.att - Target Error Within Attachment- ECSCApRec.att
UNKNOWN	AI	AI Session Failed - AI translation bypassed

« Previous 5 Items 1 to 3 of 3 Next 5 » View 5 items per page

- 3 After viewing information, click the **X** at top right to close the popup.

Update Error and Event Statuses

The **Error Status** section near the top of the Processing Lifecycle might display status information about errors and events for the transaction. After correcting an issue, you can update the status.

Extended events are processing events that occur on the customer side of processing outside of GXS and that the customer company publishes to GXS. Active Documents displays the information, such as status, in the Processing Lifecycle, if you subscribe to the Extended Event service.

GXS events are processing events that occur at GXS.

Trading Grid reconciles one type of event against the other to ensure that processing is fully audited and to report issues. Trading Grid might determine that an unreconciled transaction between GXS and a customer cannot recover without action. When this occurs, Active Documents displays status information and status update options on the Processing Lifecycle page for the transaction. Statuses are:

Status	Description
Unresolved	Errors occurred in processing the transaction on the customer side.
Unreconciled	Trading Grid did not receive all events for processing the transaction.
Resolved	Errors on the customer side or an unreconciled event status on the customer or GXS side have been corrected, and the status updated.
Reconciled	Trading Grid received all events for the file transfer.

To view and update an error or event status

- 1 Scroll to the **Error Status** section. For example:



- 2 View the information and edit a status as needed. Statuses and actions are:

Status	Action
Unresolved Extended Errors	After correcting errors on the customer side of processing, to update the status to Resolved, click Update Status . This clears this condition from the Active Documents Dashboard.
Resolved Extended Errors	If errors remain on the customer side of processing, to update the status to change it back to Unresolved, click Update Status .
Unreconciled Extended Event	Trading Grid received extended events from the customer but not GXS events for the transaction. After correcting the issue, to update the status to Resolved (not to Reconciled), click Update Status . This clears the condition from the Active Documents Dashboard.
Unreconciled GXS Event	Trading Grid received GXS events but not extended events from the customer for the transaction. After correcting the issue, to update the status to Resolved (not to Reconciled), click Update Status . This clears the condition from the Active Documents Dashboard.
Resolved Extended Event	If extended events remain unreconciled with GXS events, to change the status to Unreconciled, click Update Status .
Resolved GXS Event	If GXS events remain unreconciled with extended events, to change the status back to Unreconciled, click Update Status .

After clicking the link, a popup asks if you want to change the status.

- 3 To change the status as described in the popup, click **OK**.
- 4 The status description updates — for example, Unresolved Extended Errors changes to Resolved Extended Errors. The **Update Status** link remains, in case you want to change the status back.

Status Alerts

If your company subscribes to the Status Alert Service, the Processing Lifecycle provides a Status Alerts summary below the top section of the page. Status Alerts allow customers to optionally receive status alerts for their inbound and outbound transactions at different points, as the transactions are processed on the Active Documents platform and delivered to their trading partners.

Status alerts

- Provide status information about transaction processing, which includes information about processing events that might require action.
- Communicate transaction events to your backend system and send emails for events that may require immediate attention or action.
- Are defined by the Community Administrator. If your company does not subscribe to this service but would like to, see your Community Administrator or GXS Representative.

Like the Error Status summary described in [“Error Information” on page 444](#), the Status Alerts summary links to details about the status alerts through your Active Documents Dashboard.

The lifecycle displays only the most recent report for a status type.

Client:	GXS AS1	Receiver:	AS2 to GP Test Partner
Sender:	AS2 to GP Test Address GXS_BIN	App Ref:	AS2E2ETEST1 *BINARY
Sender Ref:	1403192213290E		
GXS Ref No:	F-4184324		
Direction:	OUTBOUND		

Error Status:	Lifecycle	No error	Full-screen Snip
	This File	No error	

Status Alerts

	Event Type	Status Time	Status File
✓	accepted	Wednesday, March 19, 2014 22:13:11 GMT	F-4184331 ;
✓	mailboxed	Wednesday, March 19, 2014 22:13:11 GMT	F-4184326 ;
✓	extracted	Wednesday, March 19, 2014 22:13:14 GMT	F-4184325 ;
✓	receivedbp		F-4184329 ;
✓	Positive Alert	⊖ Negative Alert	



The **Status Alerts** section of the Processing Lifecycle displays:

- Statuses of key events in transaction processing.
- Green icons for positive event statuses (events that occurred within the configured time period).

- Red icons for negative event statuses where either (error occurred event has not occurred within configured time period) .
 - An error event occurred.
 - A specific event has *not* occurred within configured time period.

For example, a red icon for a mailboxed event might mean that the event was rejected or that the event wasn't received before a specific period of time expired.

- Time of event status.
- Link to view details of the status alert.

To view information about a status alert, click its link in the **Status File** column.

Possible Event Types, depending on your implementation, can include:

Status	Description
accepted	The file was received by Active Documents from the trading partner's system. This is the starting point for all flows.
mailboxd	Active Documents mailboxed the translation output file for delivery to the trading partner. Not used if the Translated status is in the same lifecycle.
tgmmailboxd	The file was sent to the Trading Partner via Trading Grid Message Services (TGMS).
extracted	Trading partner extracted the file from the mailbox or interconnect.
tgmsextracted	The file was received by the Trading Partner via Trading Grid Message Services (TGMS).
receivedbp	Received by my Partner. The file/document was delivered to the trading partner's destination.
receivedfp	Received from my Partner. The file/document was delivered to my destination.

FA Information

The Processing Lifecycle page might display Functional Acknowledgement information.

Acknowledgment Codes are as follows:

- **A** — Accepted
- **E** — Accepted with errors
- **M** — Rejected; message authentication code failed
- **P** — Partially Accepted; at least one transaction set rejected
- **R** — Rejected
- **W** — Rejected; assurance failed validity tests
- **X** — Rejected; content after decryption count not be analyzed

Managed Service Platform Data

Multiple Managed Service Platform entries might exist because transactions can pass through the Managed Service Platform at different stages of processing.

For example, in a transaction with no errors:

- Managed Service Platform routed file to a translator. (See also [“Translation Information” on page 448](#))
- Translated output entered another Managed Service routing cycle for transmission to the recipient.

TGMS Data

Trading Grid Messaging Service (TGMS) enables data exchange with your partners. It manages your inbound and outbound transactions.

As with Managed Services, multiple Trading Grid Messaging Service sections might exist because transactions can pass through the TGMS as well as Managed Services at different stages of processing.

This section displays when the transaction was received and mailboxed, for example.

Other processing stages might also display, such as a Trading Grid Message Service Mailbag section, when a collection of files are going to a Trading Partner via a third party.

Communication Sections

A processing lifecycle can display different types of communication information.

Depending on your communication setup, the Processing Lifecycle page might include sections that display data exchange information. They might include any of the following protocols or standards, depending on your Trading Grid service.

AS2	FTP/SFTP	SAP ALE
AS3	X.400	OFTP
IFTP	SMG	HTTPS
POP3	SMTP	

As with Managed Service Platform and Trading Grid Messaging Service, the lifecycle might include multiple communication sections, depending on the processing that occurs.

If a Trading Grid Communication section displays, it is likely because your service processes files through the BizManager communication application at GXS. This is indicated by text in the title, for example, Trading Grid Communication (BizClientSendsFile).

Extended Event Data

Extended events are processing events that occur outside of GXS and that your company publishes to GXS. If you subscribe to the Extended Event service, the Processing Lifecycle page displays extended event data.

Event data can include, for example, an IDOC number, status information, and SAP Client identifier.

Translation Information

The Translation section might include a link to the TGTS application, where you can drill down into the translation issue.

The Trading Grid Translation section of a Processing Lifecycle describes the translation input and output and includes original and formatted input and output files, when available.

To view translation data and files

- 1 Next to the **Session #** at the top, click the **Data and Models** link to open a popup. .

The Translation Session information appears.

It displays:

- Translation Session Number
 - Translation Instance, which might identify a group of files passed to the translator
 - Links to view Original and Formatted input and output files from translation.
 - Links to view a business view spreadsheet of output files.
 - Names of translation models and attachments, if any, in the translation session
 - Option to reprocess files
 - Option to download XIF files
- 2 To view or save an original or formatted input or output file from translation, click the appropriate link, then in the dialog click **Open** or **Save**.
 - 3 To view a business view spreadsheet of output files, in the **Output Files** section, click the **CSV** link.
 - 4 (GXS only) To reprocess the file through the translator again, in the Reprocess section, click **Reprocess**, or to reprocess and generate a trace file, click **Reprocess with Trace on**. The trace log file displays in the **Translation** section.
 - 5 (GXS only) To view an XIF file (XIF_< *Translation Session Number*>), in the **XIF Files** section, click **Download**, then open or save the XML file in the usual manner.

To view details for translator inputs or outputs

- 1 In the **Translation** section, next to **Translation Input** or **Translation Results**, click a link to view files, interchanges, or documents.
- 2 View the information.
- 3 Do any of the following.
 - On a List Files page, to drill into the processing lifecycle for each linked file, click the file link. You can download the file, if available.

- On a List Unlinked Files page, click the **download** link to open the Unlinked Files Download dialog, then click the **Download** link for **Original File** or **Formatted File**.
 - Note:** For a raw text file, use **Original File**. For a text file with line breaks where delimiters exist, use **Formatted File**. (Availability depends on original document.)
 - Note:** You cannot drill down into life cycle detail for unlinked files because metadata is not available.
 - On a List Interchanges page, click a link under **GXS Ref No** to return to the Process Lifecycle page.
 - On a List Documents page, in the **GXS Ref No** column, click one icon to return to the Process Lifecycle page, or click the other icon to view related documents for the document in that row. An icon key displays on the page.
 - To view or download the list as a PDF or CSV file, click that link at top right.
 - To print the list, click the **Print** icon at top right.
- 4 If the **Translation Results** section includes a **Bypass Files** row, you can click the **Download** link in that row to view and download bypassed files for the translation.

Applicable Related Documents

To view documents related to the process lifecycle, click the **View Related Business Document(s)** link above the processing stages icons.

To view related business documents

- 1 On the Processing Lifecycle page, click the **View Related Business Document(s)** link above the navigation icons.

A new page opens.
- 2 To view related documents in a specific document type, click the number link under the icon for that document type.

For each applicable document type, a table displays basic details for related documents of that type.
- 3 To view the process lifecycle or related documents for a document on the page, use the icons as described in [“Drill Down into Data” on page 442](#).

Audits and Notes

Use this procedure view audit information, such as a record of email notifications, status updates, and other activity for the processing lifecycle.

In a future release, status updates will include statuses updated in OM.

To view audits and notes for a lifecycle

- 1 To view audits and notes for a lifecycle, at the top of the Processing Lifecycle page, click the **View Audits & Notes** link. Or, scroll down to the **Audit Messages & Notes** section.

The **Audit Messages & Notes** title bar displays.

- 2 Under the **Audit Messages & Notes** title bar, click **View Audits & Notes**. (If no button displays, click the **Audit Messages & Notes** title bar to display the button.)

A table displays any current audit messages or notes.

Information includes from left:

- Type of entry (for example, Audit of an email notification, or Note generated by the system or a GXS technician)
 - Author of the entry
 - Date the entry was created
 - Details of entry (for example, email notification sent, or a status change in the lifecycle)
- 3 To view an email notification — for example, confirmation that a file was sent — click its **Show Email** link. Author is Notification Email.
A copy of the email displays in a box. Click **Close** to close it.
 - 4 To view other pages in a long list, or to change the number of rows that display on a page, use the controls below to list.
 - 5 To exit Audit Messages & Notes, click the **Processing Lifecycle** title bar. That section displays.

Print a Processing Lifecycle Page

To print a lifecycle page, click the **Lifecycle PDF Download** icon at top right.

Transaction Process Lifecycle — New

Important: There are two lifecycle displays — “classic” and “new.” The “classic” is the established Active Documents lifecycle. The other is not a “new” lifecycle per se, it simply displays the same data in a new, easier-to-navigate format. You can easily display either lifecycle — see [“Enable the “New Lifecycle” Option” on page 452](#) or [“Enable the “Classic Lifecycle” Option” on page 443](#).


Active Documents captures the processing history of files, EDI interchanges, EDI documents, and XML documents as they pass through various tracking points.

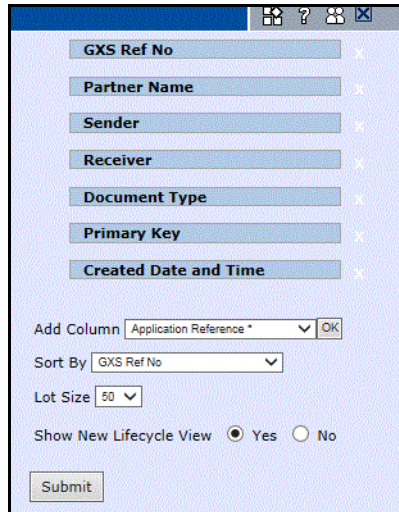
Processing lifecycle details provide information about a specific transaction at key processing points in each environment. The points that display in the lifecycle history depend on the path the transaction follows during its lifecycle.

Note: The Transaction Processing Lifecycle can provide visibility into both internal and Managed Services processes in one view. You may have the option to publish *edge events* to Active Documents. Edge events are transactions from a customer’s internal system, such as SAP (an ERP system).

Enable the “New Lifecycle” Option

You can easily toggle between the Classic Lifecycle and the New Lifecycle.

- 1 Find the transaction to examine. See [“Search for Transactions” on page 435](#).
- 2 On the Search Results page, in the upper right corner of the listing, click the  (Configure icon).
- 3 For the **Show New Lifecycle View** option, select **Yes**.



- 4 Click **Submit**.

Use this procedure to toggle between the “new” and “classic” lifecycle.

View a Process Lifecycle

To view a process lifecycle

- 1 Find the record to examine. See [“Search for Transactions” on page 435](#).
- 2 [“Enable the “New Lifecycle” Option” on page 452](#).
- 3 On the Search Results page, click the **View Process Lifecycle** icon.

By default, the **Item Details** section of the Processing Lifecycle displays. The **Summary Information** section of the page shows the processing history of the file, interchange, or document.

When you scroll down on the page, the next section is the **Lifecycle Details** that lists all of the processing steps for the transaction, translator, application, or other service used to process the transaction.

Activity	Step	Start Date & Time	End Date & Time	Status
Active Application	1 New	Thursday, September 25, 2014 11:51:00 GMT	Thursday, September 25, 2014 11:51:00 GMT	✓ Completed
Messaging Service	2 TGMS Acceptance	Thursday, September 25, 2014 11:50:36 GMT	Thursday, September 25, 2014 11:50:36 GMT	✓ Completed
Messaging Service	3 TGMS Routed	Thursday, September 25, 2014 11:50:36 GMT	Thursday, September 25, 2014 11:50:36 GMT	✓ Completed
Communication	4 IFTP File Received	Thursday, September 25, 2014 11:50:37 GMT	Thursday, September 25, 2014 11:50:37 GMT	✓ Completed
Active Application	5 Translation	Thursday, September 25, 2014 11:50:59 GMT	Thursday, September 25, 2014 11:51:00 GMT	✓ Completed
Messaging Service	6 TGMS Acceptance	Thursday, September 25, 2014 11:51:09 GMT	Thursday, September 25, 2014 11:51:09 GMT	✓ Completed
Messaging Service	7 TGMS Mailboxed	Thursday, September 25, 2014 11:51:10 GMT	Thursday, September 25, 2014 11:51:10 GMT	✓ Completed
Active Application	8 Sent	Thursday, September 25, 2014 11:51:10 GMT	Thursday, September 25, 2014 11:51:10 GMT	✓ Completed

To see what occurred during a processing stage, click the icon preceding the **Step** name. For example,

File Context Information		Input Summary		Output Summary	
GXS Ref No:	F-4504899	File Size:	2480	Instance:	TGOAIBridge
Sender:	THOMPSON	UDF File Count:	0	Session Number:	021080
Receiver:	CIRCITY	UDF Document Count:	0	Status:	COMPLETED
Sender Reference:	201412107	EDI File Count:	1	UDF File Count:	0
Application Reference:		Interchange Count:	1	UDF Document Count:	0
Service Reference:	3618804181901379	EDI Document Count:	1	EDI File Count:	1
				Terminated File Count:	1
				Interchange Count:	1
				EDI Document Count:	1

Note that you download files in different formats. Select

- **Original File** to download the file without any formatting.
- **Formatted File** to download the file with line breaks inserted.
- **PDF File** to download the file in PDF format.

- **CSV File** to download the file in a spreadsheet format.

Click the **Lifecycle Content** tab to see a hierarchy of all the files and documents involved in this one lifecycle.

In this example, you can “drill down” by clicking on a file name. This file has one interchange.

F-4504899 THOMPSON CIRCITY 201412107 04/09/14 03:23:02 EDT 021080					
↳ Interchange (1) for F-4504899					
Click on a row to list the content.					
Columns Settings Export					
GXS Ref No	Sender	Receiver	Interchange Control Number	Tracking Date & Time	Production/Test Flag
I-425974	ZZ:THOMPSON	ZZ:CIRCITY	201412107	04/09/14 03:23:07 EDT	T

And then, drill down further by clicking on the Interchange. This interchange has one document.

I-425974 ZZ:THOMPSON ZZ:CIRCITY 201412107 04/09/14 03:23:07 EDT T						
↳ Document (1) for I-425974						
Columns Settings Export						
GXS Ref No	Partner Name	Sender	Receiver	Document Type	Primary Key	Tracking Date & Time
D-1091944	Thom&son	ZZ:THOMPSON	ZZ:CIRCITY	850	PO08	04/09/14 03:23:07 EDT

You can personalize this page, or the various sections of the page, by selecting or rearranging columns. Click **Column Settings** and make your selections.

Error Information

If the processing lifecycle contains error information for the lifecycle process for a file. This enables you to drill down into information about errors in processing, which could be an invalid address, decryption error, or others.

The error section might display an **Update Status** link. To use this feature, see [“Update Error and Event Statuses” on page 444](#).

To view errors in a lifecycle or file

- 1 On the Processing Lifecycle page, click the **Item Details** tab.

The total number of errors appear in the **Lifecycle Details** section.

Lifecycle Details					
Processing Steps (4) Errors (1) Input & Output Files					
Expand All Collapse All					
Activity	Step	Start Date & Time	End Date & Time	Status	
Managed Services Platform	1 Translation	17/09/14 12:04:52 EDT	17/09/14 12:04:59 EDT	✓	Completed
Managed Services Platform	2 Enterprise Acceptance	17/09/14 12:05:01 EDT	17/09/14 12:05:01 EDT	✓	Completed
Managed Services Platform	3 Enterprise Extracted	17/09/14 12:05:01 EDT	17/09/14 12:05:01 EDT	✓	Completed
Managed Services Platform	4 Enterprise Acceptance	17/09/14 12:05:00 EDT	17/09/14 12:05:00 EDT	✓	Completed

- 2 To view error information, click the **Errors** link.
 The applicable error information displays.

Status Alerts

If your company subscribes to the Status Alert Service, the Processing Lifecycle provides a Status Alerts summary. Status Alerts allow customers to optionally receive status alerts for their inbound and outbound transactions at different points, as the transactions are processed on the Active Documents platform and delivered to their trading partners.

Status alerts

- Provide status information about transaction processing, which includes information about processing events that might require action.
- Communicate transaction events to your backend system and send emails for events that may require immediate attention or action.
- Are defined by the Community Administrator. If your company does not subscribe to this service but would like to, see your Community Administrator or GXS Representative.

Like the Error Status summary described in [“Error Information” on page 444](#), the Status Alerts summary links to details about the status alerts through your Active Documents Dashboard. The lifecycle displays only the most recent report for a status type.

The **Status Alerts** section of the Processing Lifecycle displays:

- Statuses of key events in transaction processing.
- Green icons for positive event statuses (events that occurred within the configured time period).
- Red icons for negative event statuses where either (error occurred event has not occurred within configured time period) .
 - An error event occurred.
 - A specific event has *not* occurred within configured time period.

For example, a red icon for a mailboxed event might mean that the event was rejected or that the event wasn't received before a specific period of time expired.

- Time of event status.
- Link to view details of the status alert.

To view information about a status alert, click its link in the **Status File** column.

Possible Event Types, depending on your implementation, can include:

Status	Description
accepted	The file was received by Active Documents from the trading partner's system. This is the starting point for all flows.
mailboxd	Active Documents mailboxed the translation output file for delivery to the trading partner. Not used if the Translated status is in the same lifecycle.

Status	Description
tgmsmailboxd	The file was sent to the Trading Partner via Trading Grid Message Services (TGMS).
extracted	Trading partner extracted the file from the mailbox or interconnect.
tgmsextracted	The file was received by the Trading Partner via Trading Grid Message Services (TGMS).
receivedbp	Received by my Partner. The file/document was delivered to the trading partner's destination.
receivedfp	Received from my Partner. The file/document was delivered to my destination.

FA Information

The Processing Lifecycle page might display Functional Acknowledgement information.

Acknowledgment Codes are:

- **A** — Accepted
- **E** — Accepted with errors
- **M** — Rejected; message authentication code failed
- **P** — Partially Accepted; at least one transaction set rejected
- **R** — Rejected
- **W** — Rejected; assurance failed validity tests
- **X** — Rejected; content after decryption count not be analyzed

Managed Service Platform Data

Multiple Managed Service Platform entries might exist because transactions can pass through the Managed Service Platform at different stages of processing.

Expand All Collapse All					
Activity		Step	Start Date & Time	End Date & Time	Status
Managed Services Platform	1	Translation	17/09/14 12:04:52 EDT	17/09/14 12:04:59 EDT	Completed
Managed Services Platform	2	Enterprise Acceptance	17/09/14 12:05:01 EDT	17/09/14 12:05:01 EDT	Completed
Managed Services Platform	3	Enterprise Extracted	17/09/14 12:05:01 EDT	17/09/14 12:05:01 EDT	Completed
Managed Services Platform	4	Enterprise Acceptance	17/09/14 12:05:00 EDT	17/09/14 12:05:00 EDT	Completed

For example, the translated output entered another Managed Service routing cycle for transmission to the recipient.

TGMS Data

Trading Grid Messaging Service (TGMS) enables data exchange with your partners. It manages your inbound and outbound transactions.

As with Managed Services, multiple Trading Grid Messaging Service sections might exist because transactions can pass through the TGMS as well as Managed Services at different stages of processing.

Other processing stages might also display, such as a Trading Grid Message Service Mailbag step, when a collection of files are going to a Trading Partner via a third party.

Communication Sections

A processing lifecycle can display different types of communication information. Depending on your communication setup, the Processing Lifecycle page might include sections that display data exchange information. They might include any of the following protocols or standards, depending on your Trading Grid service.

AS2	FTP/SFTP	SAP ALE
AS3	X.400	OFTP
IFTP	SMG	HTTPS
POP3	SMTP	

As with the Managed Service Platform and Trading Grid Messaging Service, the lifecycle might include multiple communication sections, depending on the processing that occurs.

Extended Event Data

Extended events are processing events that occur outside of GXS and that your company publishes to GXS. If you subscribe to the Extended Event service, the Processing Lifecycle page displays extended event data.

Event data can include, for example, an IDOC number, status information, and SAP Client identifier.

Translation Information

The Trading Grid Translation section of a Processing Lifecycle describes the translation input and output and includes original and formatted input and output files, when available.

Applicable Related Documents

To view business documents related to the process lifecycle

- 1 On the Processing Lifecycle page, click the **Related Business Document(s)** tab.

A list of related documents display.

Search Results > F-4504905 > Lifecycle Content: D-1091944

Start a New Search

Lifecycle Content | Item Details | **Related Business Documents**

382 Documents Found

Columns Settings | Export | Items Per Page: 25 | 1 2 3 4 5 | 1 - 25 of 382 items

GXS Ref No	Partner Name	Sender	Receiver	Document Type	Primary Key	Tracking Date & Time
D-1090876	Thom&son	ZZ.THOMPSON	ZZ.CIRCITY	850	PO08	09/06/14 02:16:23 EDT
D-1090882	Thom&son	ZZ.THOMPSON	ZZ.CIRCITY	850	PO08	10/06/14 06:21:07 EDT
D-1090890	Thom&son	ZZ.THOMPSON	ZZ.CIRCITY	850	PO08	12/06/14 02:20:00 EDT
D-1090907	Thom&son	ZZ.THOMPSON	ZZ.CIRCITY	850	PO08	17/06/14 05:15:16 EDT
D-1090915	Thom&son	ZZ.THOMPSON	ZZ.CIRCITY	850	PO08	19/06/14 02:54:01 EDT

- 2 To see, for example, related documents in a specific document type, at the top of the list underneath the Document Type heading, enter the document type such as **850**.

You can filter the list by typing values in the boxes underneath some of the column headings.

Audits and Notes

View audit information, such as a record of email notifications, status updates, and other activity for the processing lifecycle.

To view audits and notes for a lifecycle

- 1 Scroll down to the **Audit and Notes** section, and if necessary, expand the section.

A list of Audit messages and notes displays, showing the

- Type of entry (for example, Audit of an email notification, or Note generated by the system or a GXS technician)
 - Author of the entry
 - Date the entry was created
 - Details of the entry
 - Whether or not a notification was sent
- 2 To view an email notification — for example, confirmation that a file was sent — click its **View** link.
A copy of the email displays. Click **Close** to close it.

Scheduled Reports

Standard Reports

Active Documents provides several traditional document tracking reports.

- **Map Usage Report** — Retrieve a summary of activity related to a specific translation map or all maps. Includes the numbers of started, completed, and failed sessions.
- **Outstanding Issues Report** — List of unacknowledged documents with an issue assigned to them. GXS Global Support Services (GSS) assigns an outstanding issue to an outbound transaction when the trading partner fails to acknowledge the transaction. GXS notifies the client via the ISSUES log, and FA tracking for that document for that trading partner ends.
- **Do Not Track Report** — List of trading partners that have a Do Not Track rule for FA tracking. If some trading partners do not have the capacity (or continuously fail) to send FAs, they can be put on DO NOT TRACK status so that Active Documents does not provide FA tracking services for those trading partners.

- **Outbound (and Inbound) Reconciliation Reports** — Reconciliation reports enable you and GXS Support to audit inbound and outbound transactions and identify transactions not fully processed on the GXS service.

You can generate these reports on demand or schedule them.

Create a Standard Report

To create a Standard Report

- 1 Click the **Reports** tab.
- 2 On the left side of the page, click **Standard Reports**.
- 3 In the list that opens, select a report type. (**Map Usage Report** is selected by default.)
- 4 On the Search page, define the content of the search and report.
 Or, use a previously saved search.
 - a In the **Select Saved Searches** list, select a search name and click **OK**. The system displays the stored criteria.
 - b Make any needed changes.
 - c Click **Search**. The search results display.

Note: For Outbound and Inbound Reconciliation Reports:

- For the **List All/Exceptions** option, select **All** to report all input/output files, or **Exception** to report only those with errors.
- Be sure to select the **File** or **Document** radio button. It determines your options in the bottom section of the dialog.
- In the bottom section, deselect any **Exception** conditions that are not applicable or that you do not want in the report.

- 5 Click **Schedule**. A dialog opens.
- 6 Enter the data as described in "[Save/Schedule/Send Reports](#)" on page 460.
- 7 Click **Save**.
 The system adds the schedule to the Scheduled Reports list. If you selected **Now** in the dialog, the system generates this as a one-time report.

Create a TGMS Report or 1-Time only Report

- 1 Click the **Reports** tab.
- 2 If the Search page is not displayed, on the left side of the page, click **Search**.
- 3 On the Search page, define the content of the search and subsequent report.
 Or, use a previously saved search for the report.
 - a In the **Select Saved Searches** list, select a search name and click **OK**. The system displays the stored criteria.
 - b Make any needed changes.
 - c Click **Search**. The search results display.
- 4 Click **Save/Schedule Report**. A dialog opens.
- 5 Use the dialog as described in "[Save/Schedule/Send Reports](#)" on page 460.

After completing and saving the dialog, the system adds the schedule to the Scheduled Reports list.

Note: If you selected **Now** in the dialog, the system generates this as a one-time only report. To see it, go to the Delivered Reports page. It does not display on the Scheduled Reports page.

- 6 To view a list of reports or a specific report, see:
 - [“Transaction Process Lifecycle — New” on page 451](#)
 - [“Delivered Reports” on page 462](#)
 - [“To download reports” on page 463](#)

Save/Schedule/Send Reports

Use this procedure to save and schedule a report and optionally email it to contacts.

Note: To generate a one-time report, you must create a schedule for the report.

- 1 If you clicked **Save/Schedule** or **Schedule** after creating a report, a dialog opens.
- 2 Do one of the following:
 - To overwrite a saved search (report) with the new search, select the **Overwrite the saved search name** option.
 - To save the search as a new search, select the **Save as a new search** option, and in the **Name** field type a unique, meaningful name for the new search. If you used an existing search to create the new search, the existing search stays in the system.

Note: In either case, the name you enter becomes the **Report Name** in the **Scheduled Reports** and **Delivered Reports** lists.

- 3 To save any of the above changes to an existing report, but not change the schedule, click **Save**. Otherwise, continue.
- 4 To schedule the report, select the **I want to schedule this report** check box.
Important: Do this even for one-time reports.

The dialog displays controls for scheduling and **Report Format**.

- 5 Do one of the following:
 - For a regularly scheduled report, select the option **Daily**, **Weekly**, or **Monthly**, then enter the day or date and time for the report schedule.
 - For an immediate, one-time report, select the **Now** option. (If the search uses a **Specific Date Range**, only **Now** is available.)

Note: You can also generate a regularly scheduled report immediately. See [“To immediately generate a scheduled report” on page 462](#).

- 6 Select the **Report Format**.
- 7 To send the report to another person as an email attachment,
 - a Select the **Send this report as an email attachment** option. Fields for email recipients display:
 - **Available Contacts** in Trading Grid.

- **Available Users** in your organization.
- b** Hover your cursor over an email address for information about the contact or user.

In the lists:

- Select the applicable person (for multiple persons, hold down the **Ctrl** key and select persons), then click **Add**. The addresses display at right.
- To select all in a list, click **Add All**.
- To remove entries from a list, select them as above and click **Remove**, or click **Remove All**.

Note: If you do not see the contact that you want, have your Company Administrator add that person as a Trading Grid Online user or Trading Grid Online service contact via the Trading Grid Online Account Manager.

- c** Some users may see an **Additional Recipients** field. If so, you can specify email addresses not in either list. Separate addresses with a comma.

8 For Managed Services (MS) users, if you don't distribute the report by email, and your company is configured in Managed Services, select the **Send this report via the Managed Services Platform** option.

A dialog box with a checked checkbox labeled "Send this report via the Managed Services Platform". Below the checkbox are three input fields: "Sender", "Receiver", and "Application Ref".

Active Documents sends the report to a mailbox on a Managed Services Platform enterprise machine. Either of the following are possible:

- Users with access can access the machine by FTP and download the report.
- The mailbox can forward the report to another machine or service that makes it available to users.

9 For TGMS users, if you don't distribute the report by email, and your company is configured in Trading Grid Message Services, select the **Send this report via TGMS** option.

A dialog box with a checked checkbox labeled "Send this report via TGMS". Below the checkbox is a "Mailbox" dropdown menu showing "ADW28501-10". Below the dropdown are three input fields: "Sender", "Receiver", and "Application Ref".

10 New fields display to route the report file. Enter data into these fields; they are required. For field information, see the ["Glossary" on page 464](#).

Note: All three values must be valid identifiers configured in Managed Services or Trading Grid Messaging Services. For help, contact your system administrator.

11 Click **Save** and close the dialog.

View Scheduled Reports

To view the Scheduled Reports list

- On the left side of the page, click **Scheduled Reports**.

The Scheduled Reports page opens.

To see the current schedule for a report, in the **Report Name** column, click the applicable report name.

Note: If the **Report Name** is not a hyperlink, the report is a one-time report previously executed.

Change/Generate/Delete a Report Schedule

To change a report schedule

- 1 On the left side of the page, click **Scheduled Reports**.
- 2 In the **Report Name** column, click the applicable report name.
- 3 In the Save or Schedule dialog that opens, view or change information.
- 4 Click **Save**.

To immediately generate a scheduled report

- 1 On the left side of the page, click **Scheduled Reports**.
- 2 Find the applicable report in the list.
- 3 In the **Execute Once** column, click **Execute** for the report.

The system adds a one-time report to the **Scheduled Reports** list with the same name, along with ONCE and the current date and time.

Note: Many users delete one-time reports. Select the report check box, then click **Delete**.

- 4 Click **Delivered Reports** to view the report.

To delete scheduled reports

- 1 On the left side of the page, click **Scheduled Reports**.
- 2 In the View drop-down list at top, click **Only my reports**. The list refreshes.
- 3 Click the check box(es) in the row of the scheduled report(s) to delete.
- 4 Click **Delete**.

Delivered Reports

Delivered Reports are Scheduled Reports, including one-time reports, generated by the system.

To view a list of delivered reports

- On the left side of any Active Documents page, click **Delivered Reports**.

The Delivered Reports page opens.

On the Delivered Reports page,

The list shows the following for each generated report.

- Name of the report (click the name link to open the report)
- Report format (for example, PDF)
- Date and time the report was generated
- Name of user who created/scheduled the report
- Report status, such as **New**, **Read**, **Processing**, or **Failed**
- Report ID (click link to view audit log for the report)

Download Reports

To download reports

- 1 In the **Delivered Reports** list, find the row containing the latest version of this report.
- 2 In the **Report Name** column, click the name of the report. (**Status** cannot be **Processing**.)
- 3 Follow the prompts to open (or save) the report.

View Audit Logs

To view the Audit Logs

An audit log for a delivered report includes information such as who received the report and when. A log is available only if Active Documents emails the report to recipients.

- 1 In the **Delivered Reports** list, find the row containing the latest version of this report.
- 2 In the **Report ID** column, click the link for the report. A dialog displays audit information, such as who received the report.

Audit Log for report 'Temp_Report' - 10/01/2013 | 01:14:38 GMT - 503074

Audit Date & Time (GMT)	Audit Item	Recipient	Sender	Application Ref	Status	Additional Information
2013-10-01 01:17:54.0	Email Delivery	thrayambaka.chitukula@gxs.com			SENT	
2013-10-01 01:17:58.0	Email Delivery	surendra.malreddy@gxs.com			SENT	
2013-10-01 01:18:03.0	Email Delivery	sreekanch.reddy@gxs.com			SENT	
2013-10-01 01:18:11.0	Email Delivery	surendracomposer@gmail.com			SENT	
2013-10-01 01:18:24.0	Email Delivery	ys_reddy2000@yahoo.com			SENT	
2013-10-01 01:18:24.0	Email Delivery	Susana.Vazquez@gxs.com			SENT	

Retention Period

Active Documents deletes delivered reports after 45 days.

Delete Delivered Reports

To delete a delivered report

Delete it from the **Scheduled Reports** list — see [“To delete scheduled reports” on page 462](#).

Many users delete one-time reports.

Glossary

AI	See Translation .
AI Bridge	See Translation Instance
AI Session Number	See Translation Session Number .
Application Reference	An application identifier used in file or message routing, assigned by GXS during the implementation process. Application Reference IDs might identify a particular system, process, recipient, or data type. The value might also be blank, such as for inbound data moving from the GXS network into the first Managed Services routing cycle. This identifier is usually unique to a specific process, data type, or trading partner.
AS2	A data transport protocol designed to provide secure and reliable file transfer over the Internet. AS2 communication activity is reported on the Managed Services Dashboard.
CFTP Bridge	Connect-Out FTP Bridge. A Managed Services connection point that can use standard FTP connections to pass data to (or pull data from) a remote host.
Client Address	See Partner Address .
Communication Type	The communications protocol, standard, or interface used to submit the transaction to the Trading Grid.
Control Number	Interchange Control Number of the data coming in or going out. It is a number assigned by EDI systems to various structural levels of an EDI file for the purpose of verifying data integrity.
COS Bridge	Connect-Out Service Bridge. A Managed Services connection point that can pass task parameters to a user's program, UNIX shell script task, or NT command file.
Created Date and Time	Date and time that the transaction was created.
Delinquent Acknowledgment	See Late Acknowledgment .
Delivered Report	A scheduled report extract or a standard Managed Services report generated on a scheduled basis.
Direction	Direction (inbound or outbound) of data movement from the perspective of the GXS customer (associated with the My Address field), not the customer's partner (associated with Partner Address).
Document	An electronic business document, typically in EDI format.
Document Type	A code in EDI that identifies a specific type of EDI document, for example, 810 or INVOIC. In this field in Search, enter the identifier of a document type to return only documents of that type. To search for documents of multiple types, separate the types with commas.
EDI	Electronic Data Interchange. A standardized data structure for exchanging business documents electronically.
Enterprise	See Managed Services platform.
Extended events	Events that occur outside of GXS which the customer publishes to GXS. For example, your backend system might detect that a file failed to reconcile and reports that information to GXS.
Extracted	Status or event type in some implementations. Indicates that the trading partner extracted the document from the mailbox or interconnect.
File	A data file moving through the Managed Services environment.

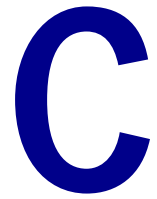
Functional Group	Refers to a structural level of an ANSI X12 EDI-formatted file that contains a document (or documents) of a particular document type. GXS Ref Num - a unique number created by the Managed Services platform to track EDI interchanges, EDI documents, and files.
Functional Group Control Number	A number assigned by EDI systems to the functional group header and trailer segments of an EDI file for the purpose of verifying data integrity. Typically applies only to ANSI X12 formatted data.
Functional Group Type	A two-digit code found in the group header segment of an ANSI X12 EDI-formatted file that identifies the type of business document it contains.
Group	See Functional Group
GXS Ref No.	A unique number created by the Managed Services platform to track: <ul style="list-style-type: none"> ■ Transmission files — preceded by F- ■ EDI interchanges — preceded by I- ■ EDI groups ■ EDI documents — preceded by D- ■ XML documents — preceded by U- ■ Trading Grid Messaging Service transactions On the Search page, the GXS Ref Num is a quick way to access lifecycle processing information.
ICS (Interchange Services)	Former name of a GXS value-added network service that manages the electronic exchange of business documents between trading partners. ICS might appear in an error message.
IFTP	A file transfer protocol with enhanced scripting used to create automated, robust and reliable File Transfer Protocol operations. IFTP communication activity is reported on the Managed Services Dashboard.
ILOG Number	Input Log Number, assigned by the Trading Grid for tracking purposes and uniquely identifies a file transmitted by the Sender. An ILOG is an 11-digit number, based on the combination of the month, day, Greenwich Mean Time, and the decimal fraction of the hour.
Inbound data	Data being received by your company.
Input File(s)	The file(s) that are used as the source data during a translation session.
Interchange	Refers to an EDI-formatted file.
Interchange Control Number	A number assigned by EDI systems to the interchange header and trailer segments of an EDI file for the purpose of verifying data integrity.
Interconnect Name	The name of a third-party VAN, for example, between your company and GXS in the file routing process.
Late Acknowledgment	An EDI acknowledgment which has not been returned in the period of time designated in the acknowledgment tracking rule, usually 24 hours.
Lifecycle	A sequential history of data activity at various processing points on the Managed Services platform.
Mailbag ID	References an interconnect service (for example, a third-party VAN). Value must be numeric.
Mailbox	GXS mailbox identifier.
Managed Services Dashboard	High level view of communication and data tracking, enabling management by exception.
Managed Services Platform	The routing application used to manage the flow of data between managed Services clients, their trading partners, and various processing points in between.

Model	A file used during translation that defines the structure of a file and mapping rules for its data content.
My Address	Your EDI or GXS routing address.
My Functional Group Address	Your EDI functional group address; applies only to the ANSI X12 standard.
Organization Report	See Delivered Report
Outbound data	Data sent by your company to a Trading Partner.
Output File(s)	The file(s) that are created as a result of a translation session.
Partner Address	The EDI or GXS routing addresses of your Trading Partner.
Partner Name	The company name of your business partner, as it is defined in Active Documents. On the Search page, you can enter a partial name and the system displays a drop-down selection list that matches the value you entered.
Primary Key (and Value)	<p>The type and value of a document identifier assigned by the sender to identify a particular documentsuch as Purchase Order Number.</p> <p>On the Search page, if you enter a partial key, the system displays a list of key types beginning with the same character(s). Click one to select it. Then, in the Value field, enter the identifier value to use for the selected key. In the Value field, you can type a partial value ending in an asterisk (*) for the system to return any documents with the selected key value that begins with those characters.</p> <p>Some Managed Services clients might have keys defined at the file level.</p>
Production/Test Flag	This is a field/flag in the EDI interchange header for ANSI X12. This field indicates if a transaction is test or production. Users can send test transactions on the production system to Trading Partners, and this flag distinguishes which transactions are test and which are production. You should work with your Trading Partner in deciding how to use this flag.
Receiver	The recipient ID in a Managed Services routing cycle. For data processed as EDI, the recipient ID is typically an EDI address. For non-EDI file types, the recipient ID represents a routing ID.
Reference #	See GXS Ref No.
Scheduled Report	A set of search parameters set up to extract Managed Services data on a daily, weekly, or monthly basis. The term also applies to Standard Managed Services reports that are scheduled.
Secondary Key (and Value)	<p>The type and value of a secondary document identifier assigned by the sender to identify a particular document such as Trading Partner.</p> <p>On the Search page, if you enter a partial key, the system displays a list of key types beginning with the same character(s). Click one to select it. Then, in the Value field, enter the identifier value to use for the selected key. In the Value field, you can type a partial value ending in an asterisk (*) for the system to return any documents with the selected key value that begins with those characters.</p> <p>Some Managed Services clients might have keys defined at the file level.</p>
Sender	The originator ID in a Managed Services routing cycle. For data processed as EDI, the originator ID is typically an EDI address. For non-EDI file types, the originator ID represents a routing ID.
Sender Reference	A number or alphanumeric value referencing the file in the routing process. The value is assigned by a process in the routing cycle.
Session #	The number assigned to uniquely identify a specific translation instance.
Standard	The format and version number for the type EDI data contained in the data file, for example, ANSI (5020), EDIFACT (00.A) or Tradacoms.

Standard Reports	A set of pre-defined reports available through the Managed Services reporting tool.
Status	<p>In Search, a drop-down list of possible statuses to search, based on the platform, level of tracking, and configuration. Status searches can apply to inbound and outbound transactions.</p> <p>In Managed Services, at the file level you can search the following statuses:</p> <ul style="list-style-type: none"> ■ With Errors ■ Without Errors ■ With Negative Alerts (last status alert was for an error or an event that did not occur within a specified time period for the event type) ■ Without Negative Alerts (last status alert for file was for an event that occurred within the specified time period for the event type) <p>In Managed Services, at the document level, you can search the following statuses, depending on your service subscription:</p> <ul style="list-style-type: none"> ■ Acknowledged ■ Not Acknowledged <p>In other implementations, you might also be able to search for files with the following Status:</p> <ul style="list-style-type: none"> ■ Extracted (picked up by trading partner) ■ Unextracted (not picked up by trading partner) ■ Rejected (by GXS) ■ Rejected from Interconnect ■ Incomplete (incomplete itineraries, which are GXS instructions for processing a document) <p>In any implementation, leave All selected to not search based on a specific status.</p>
Time Frame	<p>Date criteria based on when GXS processed the document, whereas Invoice Date Range is based on the content of the actual invoice document. From the selection list, select the type of date search:</p> <ul style="list-style-type: none"> ■ Specific Date Range — Use calendar icons to select From and To dates. Enter the time using a 24-hour clock, i.e., enter values from 00:00 to 23:59. ■ Last No. of days — Enter the desired number of days back from the current date, e.g., 10, 15, etc. ■ Relative Time Range — Select the days and times in the From and To fields. ■ None — Search all available records.
Translation	The GXS data transformation process used in translating data between data formats. Data is translated from any format to another format. Many Managed Services customers use the system to translate between their in-house data formats and standard EDI (Electronic Data Interchange) formats.
Translation Instance	Identifies which Application Integrator translation instance processed the transaction. There is one or more than one translation instance, depending on the implementation.
Translation Session Number	A number assigned to each translation process.
UDF	User-defined file format.
Unextracted	Status or event type in some implementations. Indicates that the trading partner has not extracted the document from the mailbox or interconnect.
User ID	The email address that you use to log in to Trading Grid Online.

User Report	See Delivered Report
XML/UDF	Refers to document-level processing for data in either XML structure or a user-defined format to enhance search. The XML structure might follow a defined standard, such as RosettaNet, or an in-house data format.

Active Documents Translation Errors



Use these Active Documents translator error messages for reference. For users subscribing to the Cloud Based Translations service, use these messages and their solutions for initial troubleshooting.

Error Numbers -1 and -2

-1 EOF

Some errors are generated to control the natural processing flow of the translator and these soft errors sometimes do not require any resolution. These errors are written in the trace log to show the process flow, but they are not user-retrievable.

Cause	Resolution
End of file encountered.	No resolution required.
Sockets connection closed. One of the sockets programs (client or server) exited, thereby closing the connection.	Verify that both programs are running.
Sockets connection closed. Connection between the client and server was broken due to network problems.	Contact your network or system administrator.

-2 Character Set read_set Error

Some errors are generated to control the natural processing flow of the translator and these soft errors sometimes do not require any resolution. These errors get written in the trace log to show the process flow, but they are not user-retrievable .

Cause	Resolution
Input file has data not in the list of valid characters defined by #CHARSET. This is an internal error while parsing the input document using the access model. Error -2 is not accessible in the data model. This error could be converted to return an error #0 if the minimum number of characters are parsed. If the minimum size is not met, the data model returns an error #138.	Modify the data model (data model item minimum size), access model, or input file.

Error Numbers 128 – 193

128 Code Space Exceeded

Cause	Resolution
The code generated from the rules requires more than the allocated code generation space.	Reduce the number of actions per condition by inserting null conditions.

129 Stack Exceeded

Cause	Resolution
An error has occurred in the rules processing, possibly caused by an improper function argument count.	Check functions for proper argument type and count.

130 Stack Underflow

Cause	Resolution
An error has occurred in the rules processing, possibly caused by an improper function argument count.	Check functions for proper argument type and count.

131 Illegal Instruction

Cause	Resolution
An error has occurred in the rules processing, possibly caused by an improper function argument count.	Check functions for proper argument type and count.

132 Message Queue Illegal I

Cause	Resolution
Fatal internal error.	Call Customer Support for assistance.

133 Source Access Syntax Error

Cause	Resolution
Error in parsing the source access model.	Make sure that the correct access model name is being referenced in the map component file.
Make sure that the correct access model name is being referenced in the map component file.	Edit the access model to fix the improper syntax.

134 Source Model Syntax Error

Cause	Resolution
Syntax error within the source data model. Error may be in the line above or below the line number reported.	<p>Edit the data model for any of the following common syntax errors:</p> <ul style="list-style-type: none"> ■ Check for missing brackets and characters, such as, (, {, },). ■ Check for upper-/lowercase spelling. Make sure the variable labels are spelled correctly. ■ Check for arrow pointers (->) when referencing an Array or Variable.

135 Target Access Syntax Error

Cause	Resolution
Error in parsing the target access model.	Ensure the correct access model name is being referenced in the map component file.
Missing parenthesis or bracket or syntax error at line X.	Edit the access model to fix the improper syntax.

136 Target Model Syntax Error

Cause	Resolution
Syntax error within the target data model. Error may be in the line above or below the line number reported	<p>Edit the data model for any of the following common syntax errors:</p> <ul style="list-style-type: none"> ■ Check for missing brackets and characters, such as, (, {, },). ■ Check for upper-/lowercase spelling. Make sure the variable labels are spelled correctly. ■ Check for arrow pointers (->) when referencing a MetaLink, Array, or Variable.
The target data model specified in the map component file cannot be found.	Check the name of the target data model in the map component file. Enter a valid target data model in the map component file. Check that the target data model exists.
The access model associated with the given target data model is wrong (Access Obj "Segment for dm not found").	Assign the data model item with the proper item type. Assign a different access model to the map component file.
The target data model base filename has not been entered at all or specified correctly. This issue arises when running generic models and the Process Tracking report returns an error of "Bypass with error 136".	Check the target data model base filename at the Trading Partner lowest level-outbound values. Ensure that the target data model exists on the system.

137 ATTACH Error

Cause	Resolution
When running the ATTACH function and the map component file does not exist.	Edit the model to call the correct map component file.
When running an inbound standard translation and you get the error "Message processing, Error 137," then the trading partner is not defined properly.	Verify the inbound map component file is defined properly at the Trading Partner lowest level-inbound values.

138 Data Model Item Not Found

Cause	Resolution
Invalid date, numeric format, or not found in character set.	Check the data for valid date or numeric values.
Maximum data model item size has been exceeded.	Increase the size of the data model item.

139 Data Model Item – No Value Found

Some errors are generated to control the natural processing flow of the translator and these soft errors sometimes do not require any resolution. These errors get written in the trace log to show the process flow, but they do not stop the process.

Error code 144 is returned in cases where the data model item has a value assigned to it before the function is executed. If there is no value assigned to the variable at runtime and the ampersand is missing, the translator tries to evaluate the variable. If the translator cannot evaluate the variable, it returns error code 139.

Cause	Resolution
A result of the NOT_NULL() function; depends on whether the element is mandatory or optional.	If the element is optional (may not have a value) then use the NOT_NULL() function. This function will write out the element only if the variable references a value.
No values on the Array or MetaLink.	Ensure there is a value on the Array or MetaLink.
Referencing a source data model item that has not yet been parsed.	Ensure that the data model item referenced was already parsed.

140 No Instance

Some errors are generated to control the natural processing flow of the translator and these soft errors sometimes do not require any resolution. These errors get written in the trace log to show the process flow, but they do not stop the process.

Cause	Resolution
When an item is not initialized, no reference can be made to that item.	The item needs to be initialized at the beginning of the model. VAR->Count = 0 If this step is missing, then when the variable is referenced in the next statement, error 140 will be generated. VAR->Count = VAR->Count + 1

141 Mandatory Segment/Record Missing

Some errors are generated to control the natural processing flow of the translator and these soft errors sometimes do not require any resolution. These errors get written in the trace log to show the process flow, but they do not stop the process.

Cause	Resolution
Input data does not match the tag value. This error could happen on a single or multiple occurrence of the tag item.	If the tag segment is optional, then it is a soft error and no resolution is required. If the tag segment is mandatory, then check the data records, it is possible that data records are out of sequence.

142 Try Next Error

Cause	Resolution
Fatal internal error.	Call Customer Support for assistance.

143 Sort on Non-sort Item

Cause	Resolution
Fatal internal error.	Call Customer Support for assistance.

144 Wrong Argument Type

Error code 144 is returned in cases where the data model item has a value assigned to it before the function is executed. If there is no value assigned to the variable at runtime and the ampersand is missing, the translator tries to evaluate the variable. If the translator cannot evaluate the variable, it returns error code 139.

Cause	Resolution
Improper function argument type; for example, numeric passed to a function expecting a string.	Check functions for proper argument type and count.

145 Parse Environment Error

Cause	Resolution
Cannot parse the .env file.	Check the names of the environment (.env) file in the directory and the data model when it is called to be loaded.

146 Invalid Date, Time, or Numeric String

Cause	Resolution
Source data model only. Data does not match the specified field format, for example, alpha characters in a numeric field.	Modify the data model or input file. A second log file specifies the field in error and the value received (e.g., 01.e000971.log). If no error code is put on the element, it returns to the tag.

146 Invalid Date, Time, or Numeric String

Cause	Resolution
Source data model only. Data does not match the specified field format, for example, alpha characters in a numeric field.	Modify the data model or input file. A second log file will be produced that tells exactly what field is in error and the value received (example: 01.e000971.log). If no error code is put on the element, it returns to the tag.

147 RETURN Executed

Cause	Resolution
Whenever the keyword RETURN is executed.	Soft error; no resolution required.

148 RELEASE Executed

Cause	Resolution
Whenever the keyword RELEASE is executed.	Soft error; no resolution required.

149 REJECT Executed

Cause	Resolution
Whenever the keyword REJECT is executed.	Soft error; no resolution required.

150 CONTINUE Executed

Cause	Resolution
Whenever the keyword CONTINUE is executed.	Soft error; no resolution required.

151 BREAK Executed

Cause	Resolution
Whenever the keyword BREAK is executed.	Soft error; no resolution required.

152 Lookup Error

Cause	Resolution
Failed to look up an ID with the function, #LOOKUP.	Verify that the code being checked exists in the database.

153 Memory Allocation Error

Cause	Resolution
A memory allocation could not be made due to an out-of-memory condition or a corrupted memory manager.	Check memory allocated to program. Exit other programs, if possible.

154 Virtual Memory Allocation Error

Cause	Resolution
A memory allocation could not be made due to an out-of-memory condition or a corrupted memory manager.	More document data has been parsed than the translator can store. Reduce data parsed in one map component file by breaking into separate map component files. Check for data model function syntax errors, that is, for the wrong number of arguments.

155 Virtual Memory Allocation Size Error

Cause	Resolution
An attempt was made to allocate more than 4092 bytes of memory for a data model item.	Check the data model for improper size specification.

156 Fatal Virtual Memory Error

Cause	Resolution
A reference to an unallocated memory page has occurred.	Check for data model errors, such as improper number of arguments to functions.
More than the allowable data has been parsed.	Reduce the amount of data parsed by: <ul style="list-style-type: none"> ■ Breaking the data model into two or more individual models. ■ Using CLEAR_VAL() to remove unneeded values stored on Arrays and/or MetaLinks.

157 Access Memory Allocation Error

Cause	Resolution
A memory allocation could not be made due to an out-of-memory condition or a corrupted memory manager.	Check the memory allocated to the program. Exit other unneeded programs.

158 Data Tree Memory Allocation Error

Cause	Resolution
An allocation of a data tree structure could not be made due to an out-of-memory condition or a corrupted memory manager. This may happen when the document loop is set to a high or infinite number of occurrences.	Set the data model to read one document at a time.

159 Number of Allowable Translations Exceeded

Cause	Resolution
Attempted to invoke more than the allowed number of concurrent translators.	Wait until other translation sessions have ended before executing another session.

160 Error Opening Infile

Cause	Resolution
Cannot find specified input file.	Cannot find specified input file.
File permissions are incorrect.	Try chown or chgrp to change the ownership or the group to which the file belongs.
File attributes are incorrect (read/write/execute).	Try chmod to change the file mode access permissions.
Sockets input error. The server that creates the input socket was not running when the client tried to connect to it.	Run the server program.
The input socket could not be created by the client because it could not connect to the server.	Verify that the server is running. Also, check whether another client is connected to the server. If necessary, contact your network or system administrator.
Sockets input error. The input socket could not be created by the server due to a lack of system resources.	Contact your network or system administrator.

161 Error Opening Outfile

Cause	Resolution
The translator cannot find or read in the output file specified.	Check to see if the file exists and is spelled correctly. Also check the permissions of the file.
The server that creates the output socket was not running when the client tried to connect to it.	Run the server program.
The output socket could not be created by the client because it could not connect to the server.	Verify that the server is running. Also, check whether another client is connected to the server. If necessary, contact your network or system administrator.
The output socket could not be created by the server due to a lack of system resources.	Contact your network or system administrator.

162 Error Opening Swapfile

Cause	Resolution
An error has occurred in attempting to open the virtual memory swap file.	Check permissions on the directory in which the swap file is going to be placed. Refer to the <i>Control Server Installation Guide</i> for details on the environment variables SWPDIR and TMPDIR.

163 EXEC Error

Cause	Resolution
When the EXEC command is executed within the data model, it returns either 0 or 163. Return code 0 means that the command was executed successfully. Return code 163 means that an error has occurred during the execution of the command.	The resolution depends on the command being executed. Examples include: <ul style="list-style-type: none">■ A file that is copied, renamed, or removed does not exist.■ The Directory into which the file is to be copied does not exist.

164 sort_STK malloc Error

Cause	Resolution
An error has occurred in the allocation of the sort stack.	Check memory allocated to program. End other unneeded programs.

165 Message System Call Error

Cause	Resolution
An internal error has occurred in the message system processing.	Call Customer Support for assistance.

166 Error Log Open Error

Cause	Resolution
An error has occurred in attempting to open the error log file.	Check permissions on the directory into which the error log is to be placed.

167 Function Not Found

Cause	Resolution
Unknown function found upon execution. The function may have passed the parsing check.	Check your data model and make sure to use a function supported by your current version of software. Check the spelling of the function name.

168 Data Model Memory Allocation Error

Cause	Resolution
An error has occurred in the memory allocation of the data model item.	Check memory allocated to program. End other unneeded programs.

169 Invalid Function Used in Target Access Model

This error code occurs when access functions (FIRST_DELIM, SECOND_DELIM, etc.) are used in a target mode access model. These access functions should be used for

source only.

Cause	Resolution
An error has occurred in the output stage of processing.	Remove the invalid function from the access model or use a different access model.

170 Command Line (-at) ATTACH Error

Cause	Resolution
Missing the map component file (.att).	Verify that the file exists and is spelled correctly.
Syntax error in the parsing of the map component file.	Look in the map component file and verify that no syntax errors exist.
Missing source and target data models.	Check the map component file; a source or target data model and access model definition must be present.

171 No Children Found

Some errors are generated to control the natural processing flow of the translator. They are soft errors and sometimes do not require any resolution. These errors get written in the trace log to show the process flow, but they do not stop the process. This error occurs on the tag or container where all children are optional.

Cause	Resolution
Missing delimiters in a variable length record type.	Define the element separator within the model. For example: SET_SECOND_DELIM(" * ")
Missing the record's tag match value in a variable length record type.	Modify the model or input file.
Required labeled item not found.	Check the order of the required segments in the model.

172 Access Item is a Null Pointer

Cause	Resolution
This is an internal fatal error.	Call Customer Support for assistance.

173 Improper Access Model Item Definition

This error occurs when an access object defined in a data model is not found.

Cause	Resolution
An error has occurred in the output phase of processing, caused by an improper access item (item type) definition.	Check the access model for proper definitions of access items (item types). Check the data model for the proper assignment of item types.

174 Virtual Memory Free List Error

Cause	Resolution
An internal error has occurred in the virtual memory free list processing.	Call Customer Support for assistance.

175 Virtual Memory Out of Space Error

Cause	Resolution
A reference to virtual memory beyond the addressable range has occurred.	Call Customer Support for assistance.

176 Data Field/Element Too Short

Cause	Resolution
A data model item's minimum size has not been met.	Check data model item's definition and input stream data.

177 Data Field/Element Too Long

Cause	Resolution
A data model item's maximum size has been exceeded.	Check data model item's definition and input stream data.

178 Error in Administration Database Open

Cause	Resolution
An error has occurred in the opening of an Administration Database.	Check for proper Administration Database name specifications and access privileges.

179 Unable to Get Lock

Cause	Resolution
An error has occurred in obtaining a lock on an Administration Database record.	Check the number of Administration Databases open system wide.

180 Unable to Unlock

Cause	Resolution
An error has occurred in releasing a lock on a Administration Database or Profile Database record.	Another user is accessing the same record. Ask the other user to exit from the database and then retry. If necessary, call Customer Support for assistance.

181 Read Error in Administration Database

Cause	Resolution
An Administration Database record key was not found.	Check for proper key specification.

182 Write Error in Administration Database

Cause	Resolution
An Administration Database record was not able to be written.	Check for the proper key specification.

183 I/O Error in Administration Database Access

Cause	Resolution
An internal error has occurred in Administration Database processing.	Call Customer Support for assistance.

184 Wrong Permissions or Invalid Output Character

Cause	Resolution
Input data field contains the element or sub-element separators in the data stream.	Modify the model by changing the delimiters set or input file to eliminate use of the delimiter character.
In the map component file, the output filename is missing or is misspelled.	Check the map component file and modify it accordingly.

185 Truncation Error – Data Model Object

Cause	Resolution
Data length is greater than the maximum size of the output/target field.	Turn truncation off by using the TRUNCATION_FLG keyword environment variable or modify the model or input file. Refer to the Appendix in the <i>Workbench User's Guide</i> for an explanation of the NUMTRIM() function for numeric truncation, and an explanation of the #CHARSET access model function for automatic truncation of spaces.

186 Invalid Argument Value

Cause	Resolution
This error is produced when you pass invalid values to a given function. For example, when a function requires a number and an alphabetic character is passed.	Verify with the Workbench documentation for correct syntax and value of the function.

187 Exceeded Maximum Data Models

Cause	Resolution
More than 50 different data models were used during a single translation session.	Review all ATTACH statements in the data models. Open fewer data models by restructuring the process flow or model content.

188 Exceeded Maximum Access Models

Cause	Resolution
More than 50 different access models were used during a single translation session.	Review all ATTACH statements in the data models. Open fewer access models by restructuring the process flow or model content.

189 STOP Executed

Cause	Resolution
This error message is encountered when the STOP keyword is executed within an Include statement or Declaration.	Soft error; no resolution required.

190 Mandatory Data Field – Element Missing

Cause	Resolution
A mandatory element missing in the segment.	Use the following resolutions: <ul style="list-style-type: none"> ■ Edit the data and add the missing element. ■ Modify the data model and remove it if the wrong mandatory segment was defined.

191 Invalid Character in the Data Field/Element

Cause	Resolution
An invalid character was found in the data element, such as an invalid data type or a character not in the character set.	Use the following resolutions: <ul style="list-style-type: none"> ■ Edit the data and correct the missing element. ■ Modify the data model and verify that the data type is defined properly for that element.

192 Missing Post Delimiter

Cause	Resolution
The post condition is missing in the data parsed.	Edit the data and add the missing delimiter.

193 Access Model Pre-Condition Not Met

Some errors are generated to control the natural processing flow of the translator. They are soft errors and sometimes do not require any resolution. These errors get

written in the trace log to show the process flow, but they do not stop the process.

Cause	Resolution
A delimiter precondition that is defined in the access model is not found in the input stream.	Use the following resolutions: <ul style="list-style-type: none"> ■ Edit the data and add the missing delimiter. ■ Change the access model item referenced by the data model item to one that does not have a precondition defined. ■ Change the access item definition of the precondition to optional.

Error Numbers 200 – 255

200 Unable to Recover

Cause	Resolution
More than one error has occurred in the element or segment and the translator is unable to recover.	Edit the data and correct the error in the segment.

201 Recovery on Minimum

Refer to ["176 Data Field/Element Too Short"](#) on page 480 with RECOVERY mode set.

202 Recovery on Maximum

Refer to ["177 Data Field/Element Too Long"](#) on page 480 with RECOVERY mode set.

203 No Value Available for Item

Refer to ["190 Mandatory Data Field – Element Missing"](#) on page 482 with RECOVERY mode set.

205 Recovery on CHARSET

Refer to ["191 Invalid Character in the Data Field/Element"](#) on page 482 with RECOVERY mode set.

206 Recovery on POST_COND

Refer to ["192 Missing Post Delimiter"](#) on page 482 with RECOVERY mode set.

208 Recovery on LKUP

Refer to ["152 Lookup Error"](#) on page 475 with RECOVERY mode set.

211 Invalid Structure

Cause	Resolution
An invalid structure exists either in the xml document or schema or .dtd.	Correct the error in the xml document or schema or .dtd. Ensure that the structure is valid.

212 XSL Missing Schema

Cause	Resolution
Unable to locate these files within the OT_XSDPATH environment variable.	Do one of the following: <ul style="list-style-type: none"> ■ If the name of the .dtd or schema starts with "http:" then the proxy server is used to locate the file. ■ If the name of the .dtd or schema does not start with "http:" then ensure that the files are located within the OT_XSDPATH environment variable.

213 XML Referring Invalid DTD/Schema

Cause	Resolution
XML validation error as the referenced DTD/XSD is incorrect in syntax.	Ensure that the reference DTD/Schema is valid and follows correct syntax.

214 XML Invalid Against Schema

Cause	Resolution
Occurs when the XML document is not according to the specified .dtd or schema, if a reference to the .dtd or schema exists.	Ensure that errors such as required fields are missing, structure not matching schema, and other schema field validations are corrected.

215 XML Stylesheet Error

Cause	Resolution
Occurs when the XML document has a stylesheet error, and is unable to parse.	Correct the stylesheet error.

216 XML Stylesheet Error

Cause	Resolution
Occurs when the XML document has a stylesheet error while executing AI extended function.	Correct the stylesheet error.

217 XML Proxy Server Error

Cause	Resolution
Occurs when the XML document has a proxy server error and is unable to locate the proxy server.	Locate the proxy server error.

218 Source Constraint Stylesheet Parse Error

Cause	Resolution
Occurs when the XML document has a source constraint stylesheet error and is unable to parse.	Correct the stylesheet error.

219 Target Constraint Stylesheet Parse Error

Cause	Resolution
Occurs when the XML document has a target constraint stylesheet error and is unable to parse.	Correct the stylesheet error.

220 Source Constraint Stylesheet Validation Error

Cause	Resolution
Occurs when the XML document has a source constraint stylesheet error and is unable to validate.	Correct the stylesheet error.

221 Target Constraint Stylesheet Validation Error

Cause	Resolution
Occurs when the XML document has a target constraint stylesheet error and is unable to validate.	Correct the stylesheet error.

222 Output XML Validation Error

Cause	Resolution
Occurs when the XML document that is output has a validation error if a reference to the .dtd or schema exists.	Correct the validation error.

237 Internal c-tree Error

Cause	Resolution
Out of disk space when performing a rebuild.	Free up additional space. The rebuild requires 12 times the space of the file to be rebuilt. By default, the working directory is used for temporary files during the rebuild. Another directory can be specified for use by using the environment variable TMPDIR. Refer to the <i>Control Server Installation Guide</i> for additional information about the TMPDIR environment variable.
Database has become corrupted. Possible causes of corruption include performing a kill -9 on the Control Server, a corrupt file system, internal system problems, or similar issues.	Delete the corrupted file. For example, delete the DM_ file causing the problem so a new one can be created.

238 Maximum CPU Time Exceeded

Cause	Resolution
CPU maximum time has been reached. This could be from a spinning translation.	Correct the translation that is causing the spinning. If the translation is running correctly and taking time to process due to the size of the input file, increase the MaximumCPUTimeAllowed value under Standards - Global - SystemResourceConfiguration within Tradeguide.

239 Maximum Output File Size Exceeded

Cause	Resolution
Output files created by the translation have reached the maximum size.	Correct the maps that are causing the output files to be so large, possibly due to spinning on one record or field. If the output file needs to be large, increase the MaximumOutputFileSizeAllowed value under Standard - Global - SystemResourceConfiguration within Tradeguide.

248 Value Stack Memory Error

Cause	Resolution
Translator runs out of memory when adding to the value stack.	<p>You can resolve this error message in one of three ways:</p> <ul style="list-style-type: none"> ■ Add more system memory. ■ Perform a modeling change that attaches to the target x number of line items, then clear the arrays upon returning to the source data model. Repeat until all line items are parsed. ■ On UNIX, increment the maximum data size.

249 Error in idcopy In Access Parser

Cause	Resolution
Fatal internal error.	Call Customer Support for assistance.

250 Translation Memory Error

Cause	Resolution
Ran out of memory during translation. Could be caught in an infinite loop.	Correct the data model and, for UNIX users, consider setting the system ulimit for additional protection. It is recommended that when using the asterisk (*) to set a variable maximum occurrence, check the rule logic or the nature of the data model to ensure the loop exists appropriately.

251 Error Allocating vstack

Cause	Resolution
Out of memory or corrupted memory manager.	Check memory allocated to program. Exit other programs, if possible.

252 Unable to Open Archive File (in ARCHIVE_REC())

Cause	Resolution
Cannot write to archive file.	Check file permissions in directory.

254 Error Allocating Buffer Space for Device

Cause	Resolution
Out of memory or corrupted memory manager.	Check memory allocations. Refer to memory usage documentation.

255 Error Parsing Command Line Map Component File

Cause	Resolution
Syntax error in the parsing of the map component file from the command line.	Use the following resolutions: <ul style="list-style-type: none"> ■ Look at the command line entry, and verify that no syntax errors exist. If errors exist, make the necessary corrections. ■ Look in the map component file, and verify that no syntax errors exist. If errors exist, make the necessary corrections.