Setting Up EDI eCommerce

The complexity of setting up and implementing eCommerce depends on your company's specific needs. If you usually exchange standard types of EDI documents with your trading partners, then the QAD-developed transformation mappings can probably meet your needs with a minimum of customization. However, eCommerce's powerful implementation tools let you perform setup tasks of much greater complexity.

This chapter describes all the programs available for implementing eCommerce. Depending on the complexity of your implementation scenario, you do not necessarily have to use all of the programs—or even most of them.

For more information on how eCommerce works, see Introduction to EDI eCommerce on page 6823.

Setup Overview

The implementation definition is the main element used to customize the transformation of data exchanged with an external system. Building an implementation definition is a complex task. But many eCommerce installations do not require this activity. QAD provides a set of templates with much of the basic content already in place. eCommerce implementers then use eCommerce programs to copy and modify the template and to perform other required setup tasks.

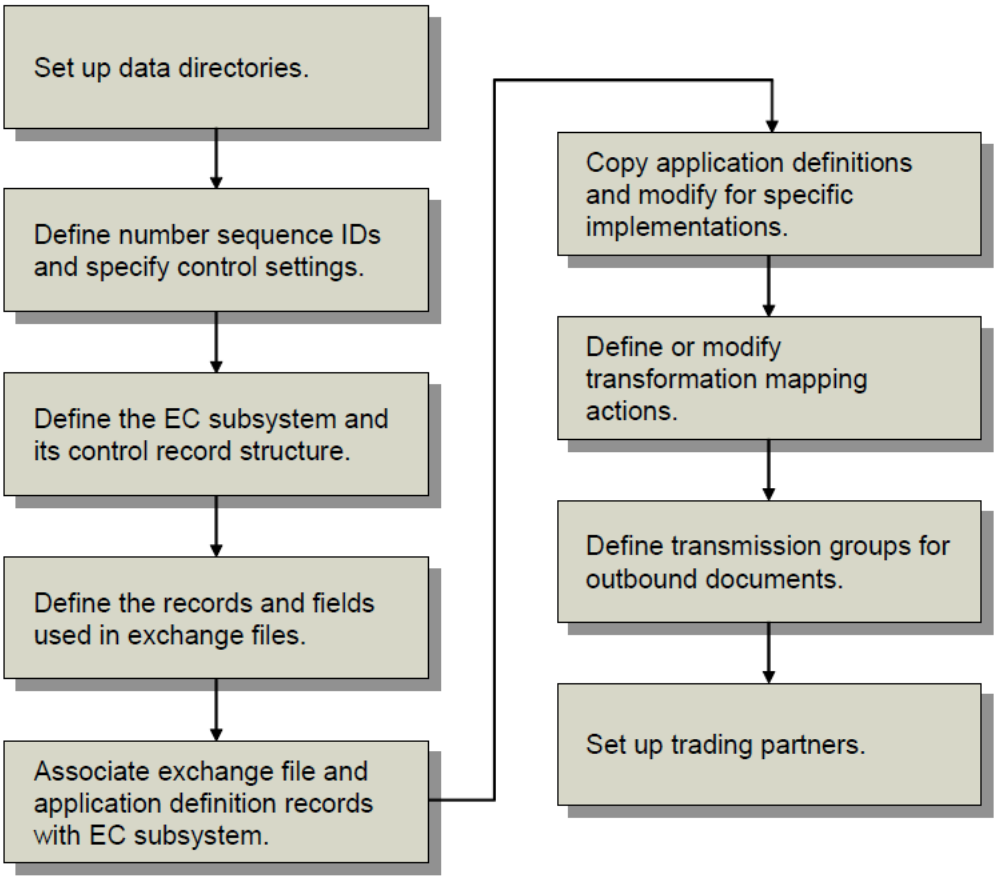
The setup procedures assume that you have already completed a standard system implementation and have defined common base data such as items, customers, and sites.

A significant step in the EDI eCommerce implementation process is to define the document exchange requirements of an external EC subsystem. During setup, you do this task in terms of several elements:

- Control record structures and formats used by the EC subsystem.
- Data structure definitions of the standards neutral format (SNF) exchange files communicated with the EC subsystem.
- Transformation mappings that describe the actions required to transform data from one system’s specifications to the other’s. If these actions require functions not provided with eCommerce, you can define your own functions.

The following image summarizes a typical setup workflow. The degree to which you use the setup programs depends on your company’s trading partners and the types of documents you exchange with them.

Typical Setup Workflow



In addition to the initial setup programs, the eCommerce menus provide several other programs you can use to customize the way your system uses eCommerce. These programs allow you to:

- Copy the QAD-provided exchange file, application document, and implementation definitions so that you can modify them for your specific needs.
- Build your own application document definitions for use in designing trading-partner-specific implementations.
- Custom-define additional definitions and functions used in transformation mapping. You can copy existing items to use as the basis for new ones.
- Define cross-references to specific data values that can be converted automatically to new values during processing.
- Define data values that can be validated automatically against specified values during transformation.
- Set up a polling schedule that enables the system to search automatically for files and begin processing when it finds them.

For more information, see Using Other Setup Programs on page 6895.

Setting Up Data Directories

Before setting up EDI eCommerce, the system administrator should set up a data directory for eCommerce data files. Below that directory, there must be several subdirectories for the following types of data:

- Error files
- Inbound files for import.
- Archive files, which are inbound flat files that have completed processing
- Function definition files, which include the user-defined functions used for transformation processing
- Files from an external system that are imported directly into the document repository for transformation and export to another external system
- Outbound files, which contain exported documents.

All but the outbound directories are specified in **eCommerce Control**. Outbound directories are used in **Transmission Groups** to specify where exported document files are stored for a trading partner. You can set up a separate outbound directory for each trading partner.

If your company's environment includes clients on multiple operating systems, your system administrator must ensure that these directory definitions do not contain anything that is operating system-specific.

To set up a dual environment, create a master data directory that includes the other eCommerce subdirectories. Then change the PROPATH—an environment variable containing the list of directories searched by Progress—for eCommerce users to include the master directory as the first item. For the directory definitions in **eCommerce Control** and **Transmission Groups**, use only the names of the subdirectories, such as error or archive.

Standard Directory Structure Conventions

QAD Global Services recommends that you establish the following EDI eCommerce directory structure on each regional server.

Directory	Description
Root Directory	
/ediec	Server (region) level root +
Global Directories	
/ediec/bin	Server (region) level shared scripts +

/ediec/dat	Server (region) level shared script data +
/ediec/func	Server (region) level shared functions
/ediec/log	Server (region) level shared script logs +
Domained Directories	
/ediec/{domain}	Domain level branch +
/ediec/{domain}/arc	Base for archived (processed) files +
/ediec/{domain}/arc/in	Archived inbound files
/ediec/{domain}/arc/out	Archived outbound files +
/ediec/{domain}/arc/scn	Archived non-Adaptive Applications files
/ediec/{domain}/arc/trk	Archived document tracking files *
/ediec/{domain}/bin	
/ediec/{domain}/dat	
/ediec/{domain}/err	Files processed with errors
/ediec/{domain}/err/gateway	Files processed with gateway-specific errors +
/ediec/{domain}/func	
/ediec/{domain}/in	Unprocessed inbound files
/ediec/{domain}/lib	Trading partner library files +
/ediec/{domain}/log	
/ediec/{domain}/out	Unprocessed outbound files
/ediec/{domain}/pre	Unprocessed preprocessor files +
/ediec/{domain}/pre/err	Preprocessed files with errors +
/ediec/{domain}/scn	Unprocessed non-Adaptive Applications files
/ediec/{domain}/scn/err	Non-Adaptive Applications files processed with errors
/ediec/{domain}/tmp	Temporary files +

/ediec/{domain}/trk	Unprocessed document tracking files *
/ediec/{domain}/trk/err	Document tracking files processed with errors *

+ = Directory does not correspond to a directory reference within EDI eCommerce

* = Directory corresponds to a directory reference for QAD Global Services document tracking

If in the future an additional delineation is required on a single server, introduce an environment level within this structure and adjust the setup as required:

/ediec/{environment}/{domain}

eCommerce Control

The program includes three panels:

- Use the Main panel to set domain-level control values, such as directories used during document import and export.
- The second panel sets default values for error handling, as well as the default sequence IDs used to generate repository document numbers.
- The third optional panel lets you set application-specific values that apply only to such functions as Financials, EMT, and so on.

eCommerce Control

Default Subsystem

Enter the name of the EC subsystem used when documents being processed do not identify the originating subsystem. Define this subsystem in **EC Subsystem Definitions** before you can enter it in this field.

Import Data to Application

Input Directory

Enter the directory where the EC subsystem places files for import. When you run Document Import from the **EDI Processing** Actions menu with Direction set to Outbound, the system uses this directory as the source directory for selecting files.

Note Destination directories for exported files are specified in the Destination field in **Transmission Groups**. If they do not exist, the system prompts you to create directories.

Archive Directory

Enter the directory where the system places the original SNF files when processing begins.

Error Directory

Enter the directory where files from the Input Directory that fail during load or unload are stored. Reporting and reprocessing functions use this directory for input.

Export Data from Application

Input Directory

Enter the directory where the system looks for files to load directly into the document repository and process for export without creating business documents.

When you run **Document Import** with Direction set to Outbound, the system uses this directory as the source directory for selecting files.

Archive Directory

Specify the directory where files from the Input Directory are moved after export processing.

Error Directory

Enter the directory where files from the Import Directory that fail during export processing are stored. Reporting and reprocessing functions use this directory for input.

Function Directory

Enter the directory where the user-defined functions used during transformation processing are stored.

Process Log Directory

Specify the default directory where the system creates log files when it is processing documents. If the directory does not exist, the system attempts to create it.

You can leave this field blank. If you enter a value, it defaults to the same field for new records in **EC Subsystem Definitions**.

Process log files can be used for two purposes:

- As a record of what took place during a processing session, including warning and error messages.
- As source information for system-generated email messages. When processing errors occur, the system automatically notifies the user by adding the process log file to an email message, if the email system and address information is defined in **Users**. Additionally, it sends status information from the log to other email addresses specified for individual location cross-reference records in **Trading Partners**.

Unless it is blank, the subsystem definition value overrides the **eCommerce Control** value. If both are blank, logging is disabled, and process control functions do not create permanent log files. Instead, the system creates temporary log files in the user's startup directory. After sending process status email messages, the system deletes the temporary logs.

Enable Security for ASN Export

Select this field checkbox to include security for ASN details in the output report.

The default value for is set to clear.

Three fields set values for output reports produced when processing is initiated from outside the EDI eCommerce user interface. For example, some Financials applications can be used to process bank transactions directly from a related menu item.

Status

Specify the level of information included in the output report.

Failed (default): Only files that failed to load are included in the report.

Passed: Only files that loaded successfully are included.

Both: All processed files are included.

Print Details

Select this field to include detailed error and warning messages in the output report.

When it is left clear, the report includes only a summary of process events.

Exclude Pending Pick

Select this field to not include inventory that has status pending pick in the output report.

Report Output

Enter the output device or file name the system uses to display the report.

If you leave this field blank and click Next, the system sets it to the file name eComOut.

Note When you use an EDI eCommerce menu program to select documents for import or export, these fields have no effect. You can set the corresponding values directly in the user interface.

eCommerce Transaction Control Panel

Suppress Warnings

Select this checkbox to prevent the system from generating status messages that result from warning conditions during transformation or gateway processing.

When this field left clear (the default), the system always generates warnings in the status message table.

This field defaults to new records in **Trading Partners**. You can override it at the trading partner, trading partner document, and trading partner location cross-reference level.

Stop on Error

Select this checkbox to have the system stop processing a document during transformation when the first error is encountered. The system

skips the rest of the document and moves to the next sequence number.

When this field left clear (the default), processing continues regardless of the number of errors that occur.

This field defaults to new records in **Trading Partners**. You can override it at the trading partner, trading partner document, and trading partner location cross-reference level.

Suppress Session Report

Select this checkbox to prevent the system from generating a session report following document load or unload.

When this field left clear (the default), the system always generates session reports.

This field defaults to new records in **Trading Partners**. You can override it at the trading partner, trading partner document, and trading partner location cross-reference level.

Send Email on Error Only

Select this checkbox to have the system send email only when the document does not process successfully. Otherwise, email is sent regardless of document status.

This field defaults to new trading partner location cross-reference records defined in **Trading Partners**. You can override the control program value as needed.

Email Address

Enter the email address of the person who receives a message when an error occurs during an import or export session.

Note This address is not related to the Send Email on Error Only field.

Addresses must be complete; for example, jsmith@company1.com.

Use **Users** to set up your system to manage automated email messages.

Source Code Page

Optionally, specify the default code page used to create files imported to your system. During import processing, the system converts the data to the system code page.

This field is not validated. Be sure that the value you enter is included in the Progress file DLC/convmap.cp. Otherwise, the conversion program returns an error.

If you enter a value, it defaults to **EC Subsystem Definitions**. You can update it as needed for individual subsystems.

Counters: Inbound Exchange, Outbound Exchange, Inbound Application, Outbound Application, Error

Specify the default sequence IDs used to assign numbers to documents during processing. You can override these values in **Trading Partners**.

The fields cannot be blank. They must contain values defined in **Number Ranges**.

You can use the next frame to override one or more settings for individual applications.

Application Panel

Use this panel to override system-level sequence ID defaults defined in the previous frame for a specific application. You can save your changes only if you enter a valid sequence ID in one or more fields. For blank fields, the system continues to use the sequence IDs from the Transaction Control panel.

EC Subsystem Definitions

Create a separate **EC Subsystem Definitions** record for each direction—inbound and outbound. The combination of subsystem and direction is a unique identifier, so you can use the same subsystem name for both.

Use the Main panel to define basic EC subsystem data.

Main

Subsystem

Enter up to 20 characters to identify an EC subsystem that exchanges data with your system. Use any name that makes the subsystem easy to identify. For example, if you use the same subsystem for both imports and exports, you can add the suffix “In” or “Out” to the end of the subsystem name.

Inbound

Select this checkbox to specify that this EC subsystem definition is for inbound records. In eCommerce, direction is always relative to your system—inbound for imports and outbound for exports.

Each EC subsystem must have separate definitions for inbound and outbound records.

Field Delimiter

If you specify variable-length fields for this EC subsystem, enter the ASCII code for the character the EC subsystem uses to separate fields.

Record Code Length

Enter the number of characters the EC subsystem uses to indicate the type of record it is sending. This value must be from 1 through 20.

Record Code Position

Enter the number of the character position where the record code begins.

Enter zero to indicate that the record code is in the last position in the document.

Remote Host Name

If this EC subsystem runs automated activities on a host computer, enter the name of that host computer. For example, you can run an e-mail program on this system to process messages containing exported files.

To specify the program that the remote host runs, use the Processing Program field in **Transmission Groups** for the transmission group that accesses this host.

Logfile Directory

If the computer specified in the Remote Host Name field creates a log file related to its processing activities, enter the directory that contains the log file.

Process Logfile Directory

Enter the complete path to the directory where the system creates log files when processing documents using this subsystem. The system verifies that the specified directory is valid. This value defaults from **eCommerce Control**, if a value is specified.

Process log files can be used for two purposes:

- As a record of what took place during a processing session, including warning and error messages.
- As source information for system-generated email messages. When processing errors occur, the system automatically notifies the user by adding the process log file to an email message, if the email system and address information is defined in **Users**. Additionally, it sends status information from the log to other email addresses specified for individual location cross-reference records in **Trading Partners**.

Unless it is blank, the subsystem definition value overrides the **eCommerce Control** value. If both are blank, logging is disabled, and process control functions do not create permanent log files. Instead, the system creates temporary log files in the user's startup directory. After sending process status email messages, the system deletes the temporary logs.

Format

Select this checkbox to specify that the fields in the EC subsystem records are fixed lengths. Enter a question mark (?) to indicate XML format.

Quote Character

Enter the ASCII code for the quote character used by the EC subsystem. If no quote character is required, enter zero.

File Extension

Enter the three-character file extension that the EC subsystem uses to identify its inbound files. For outbound files exported from your system, the system appends this extension to identify the files to the EC subsystem. The name of the file is based on data you define in **Transmission Groups**.

Additionally, the load function uses this extension to determine which EC subsystem definition to use for interpreting control records. For more information, see Transmission Groups on page 6867.

Logfile Extension

If the computer specified in Remote Host Name creates a log file related to its processing activities, enter its file extension.

Application

Enter a code representing the application to which this subsystem definition applies. The default is EDI.

Source Code Page

Optionally, specify the code page for inbound files. This field defaults from **eCommerce Control**.

During import processing, the system converts the data to the system code page using the specified code page.

This field is not validated. Be sure that the value you enter is included in the Progress file DLC/convmap.cp. Otherwise, the conversion program returns an error.

Parsing Program

For an inbound subsystem definition, optionally specify the Progress program name of a procedure that runs before the system attempts to load the imported document.

A primary use of this field is to specify a program that sets default token values in situations where the inbound document does not provide such values.

For example, when you import bank statements for use by QAD Financials, the inbound document does not provide values required for the control record to set the tokens. Parsing Program can reference a program that rewrites the incoming document to an SNF file that provides a record code on each line. When it reads this file, the system can use these record identifiers to correctly interpret the document so that it loads without errors.

Control Records

Use the Control Records panel to define the control records for this EC subsystem.

Sequence

Enter a sequence number identifying the order in which control records are received from or sent to the EC subsystem.

Record Name

Enter the name of this control record.

Requirement

Select this checkbox to specify that this control record is mandatory for the receiving system—your system for inbound documents or the

EC subsystem for outbound documents. When mandatory records are not included in a document being processed, the system generates an error.

Record Code

Enter the alphanumeric code the EC subsystem uses to define this type of record.

Token

A token is a critical variable used to populate the exchange file master record during the load process. It provides such information as the trading partner identifier or the document type. Tokens determine the specific way data is transformed between the EC subsystem and your system.

If applicable, enter the name of the token associated with this record. Valid tokens are:

- tp-id (mandatory for transformation processing)
- tp-document-id (mandatory for transformation processing)
- tp-document-nbr
- tp-message-nbr
- tp-func-grp-nbr
- tp-interchange-nbr
- tp-address
- tp-site
- app-table
- app-table-index
- app-table-value
- app-document-id
- app-document-vers
- app-address
- app-site

To assign multiple tokens to one field, separate them with commas. The system treats any other values in this field as reference information.

Omit Record

Select this checkbox to prevent the system from writing this record to the output file. This field applies to exported files only.

This field is disabled if the Inbound field is selected in the Main panel.

Omit Record Code

Select this checkbox to prevent the system from writing the record code to the output file. To prevent the record itself from being added to the file, select the Omit Record field.

This field applies to exported files only.

This field is disabled if the Inbound field is selected in the Main panel.

Add Child

Select Add Child for a selected record to define each field included in the control records for this EC subsystem.

Sequence

Enter the numerical sequence in which this field occurs in the record.

Field Name

Enter a descriptive name for this field.

Token

If applicable, enter the token that applies to this record.

Requirement

Select this checkbox to specify that the field is mandatory for the receiving system—your system for inbound documents or the EC subsystem for outbound documents.

Minimum

Enter the minimum length of this field. The system validates that data included in the field is greater than or equal to the minimum required number of characters.

Maximum

Enter the maximum length of this field.

- If the field lengths are variable and separated by the specified delimiter, the system validates that the field length is between the Minimum and Maximum values.
- If the field lengths are fixed, the system uses this value as the actual length to calculate where each field starts and ends.

Default Value

Optionally enter a default value for the system to place in this field if no other value is specified. For example, this field could be used on an outbound transaction when the receiving EC subsystem requires a value in a field that generally is blank.

Exchange Definitions

An exchange file defines the documents communicated between the EC Subsystem and your system. It includes data record structures that match the definition of the SNF communicated with the EC Subsystem.

Note You can use this program to modify an exchange file definition you created yourself or one based on a copy of a QAD-developed template definition. However, the system does not allow you to modify a QAD-developed definition. If you attempt to do so, the program acts as an inquiry and shows the data in display-only mode. Use **Exchange Definition Copy** to copy a definition before modifying it.

Important Create a different exchange file definition for each type of document.

Note It is also possible to create an exchange file definition based on an existing document definition, as well as an external .xml or .xsd file, or on Progress source code that defines a temporary table.

The program consists of three panels. Optionally, when the exchange definition is used for mapping outbound documents to extensible markup language (XML) format, additional panels display.

Use the Main panel to identify an exchange file definition by a unique combination of name, version, and direction. You can delete a definition by selecting the definition and clicking the Delete button on the top banner. However, if the system finds an existing transformation map or EC subsystem cross-reference record that references this definition, it displays an error message. Delete the transformation map in **Transformation Definitions** or the cross-reference in **EC Subsystem Exchanges** before deleting the exchange file definition.

Note You cannot delete QAD-provided exchange definitions.

Main

File

Enter or select from the lookup menu the record to use for the exchange file definition.

Note This is a mandatory field.

Description

Enter a text description of this exchange file definition. This field is optional, the description is for reference only.

Document Type

Enter the document type for the document that the system creates using this definition. The resulting XML document includes this identifier in the first line.

Document Entity

Enter the URL containing the namespace definition that controls the XML structure associated with documents created using this definition; for example, http://www.w3.org/2000/xmlns/.

Version

Enter a version number. You can use the same name for more than one definition, then use a different version number to differentiate among multiple definitions with the same name.

Additionally, you can use Direction—inbound or outbound—to distinguish between multiple definitions with the same name.

Inbound

Select Yes to set the direction of the file transfer as inbound. Documents imported into your system are inbound, while documents exported from your system are outbound.

QAD

This checkbox will be selected if this is a QAD-developed template definition.

System Literal

Specify the document type definition (DTD) used to validate the content of exported XML files is on a public server or within a system domain. Valid values are:

- PUBLIC: The value specified in System Location is outside the local system domain.
- SYSTEM: The specified system location is within the local system domain.

System Location

Enter the path to the location where the document type definition (DTD) used to validate the content of XML files is stored.

Exchange File Records

Sequence

Specify the sequence number of this record. The system automatically assigns the next number, but you can change the value to any number. Set up a logical numerical hierarchy for record sequence numbers.

Important In all cases, the first record in a document added to the repository must be sequence number 1. Other records can be numbered as you choose. The following examples show valid and invalid record sequences.

Valid	Invalid

1, 2, 3, 4, 5	2, 3 ,4, 5
1, 10, 20, 22, 30	10, 20, 22, 30

After you have used an exchange definition in a transformation definition, you cannot change record sequences in the exchange definition without deleting and reentering the entire transformation definition.

Record Name

Enter a name for this record. Each record name must be unique in an exchange file definition.

This record name is used as a variable during the transformation process, without the sequence number.

Requirement

Select this field to indicate this record is required during the load or unload process. When the system cannot find a mandatory record to load or unload, it generates an error message and does not process the associated document.

Loop Occur

Enter the number of times the processing logic loops through the records during transformation.

Loop End Sequence

Enter a defined record sequence number to indicate where the loop ends. For example, enter a Loop Ends Seq value of 2 on sequence number 2 to indicate that the entire loop sequence takes place on a single record. Or, enter an end sequence of 4 on sequence number 3 to indicate a loop that starts at 3 and ends at 4.

To specify a loop structure that includes all records, enter zero or a number higher than the last record sequence defined.

XML Namespace

Enter Yes to display a pop-up that lets you specify an XML namespace for this record. This field is enabled only for outbound definitions.

Add Child

Sequence

Specify the sequence number of this record. The system automatically assigns the next number, but you can change the value to any number. Set up a logical numerical hierarchy for record sequence numbers.

Name

Enter the name of the field. The name must be unique in the record. This field name is concatenated with the record name and used as

a variable during the transformation process, without the sequence number.

Requirement

Select this checkbox to indicate that this field is mandatory during the load process or leave clear to indicate that it is not. When the system cannot find mandatory fields to load, it generates an error message and does not process the associated record.

Type

Enter a code representing the type of data stored in this field. Valid entries are:

- AN: Alphanumeric
- D: Date
- I: Integer
- L: Logical
- R: Real number

Minimum

Enter the minimum number of characters to be included in this field. The system validates that required or optional data is greater than or equal to the minimum required value for the field.

Maximum

Enter the maximum number of characters to be included in this field.

Token

If applicable, select the token from the lookup menu. Valid values are the same as those used when you define the EC subsystem.

XML Tag

This field is disabled..

Element

This field is disabled.

Namespace

This field is disabled.

Insert PT

This field is disabled.

Exchange Definition Report

For more information, see Exchange Definitions on page 6849.

Filter

File Name

Specify the file name or a range of file names to use for the report.

Version

Specify the file version or a range of versions to use for the report.

Inbound

Select Yes to view inbound files only.

Select No to view outbound files only.

Exchange Definition Copy

Use **Exchange Definitions** to modify the copy as needed. For more information, see Exchange Definitions on page 6849.

Main

Source Exchange File

Specify the source exchange file you want to copy.

Source File Version

Specify the source file version you want to copy.

Source File Inbound

Select this field to specify that the source file is inbound.

Destination Exchange File

Specify a unique file name to identify the new exchange definition.

Destination File Version

Specify a file version to identify the new exchange definition.

Destination File Inbound

Select this field to specify that the new exchange file is inbound.

Note The direction does not have to be the same for the source and destination file. For example, you can base an outbound definition copy on an inbound source definition.

EC Subsystem Exchanges

You can set up cross-references using this screen when you load records into the exchange repository, through transformation, into the document repository, and through a gateway into the database.

This cross-reference lets the system place data properly in the exchange repository before beginning transformation processing.

Control records are defined in **EC Subsystem Definitions**.

Main

Use this panel to define a unique combination of EC Subsystem, Document Type, and Exchange File Name.

Subsystem

Enter the name of an EC Subsystem defined in **EC Subsystem Definitions**.

Document

Enter the type of document to exchange between your system and this EC subsystem. For example, 810 could be used to identify an ANSI X12 standard 810 document, which is used to export an invoice. The tp-doc-id token normally represents this value.

Trading Partner

Enter an identifier for the trading partner to which this exchange/subsystem cross-reference applies. Leave blank if it applies to all trading partners.

By setting up trading partner-specific cross-reference records, you can apply different SNF definitions for different trading partners.

Exchange File Name

Enter the name of the exchange file to be associated with this document type. If you have set up multiple exchange files with the same file name in **Exchange File Definitions**, scroll through the unique name, version, and direction combinations and select the appropriate one.

Inbound

Select this field to specify the direction of this document type as inbound. Documents imported into your system are inbound, while documents exported to an EC subsystem are outbound.

Version

Enter the version of the exchange file to be associated with this document type. Multiple exchange files can have the same name. Be sure to use the correct version for the specific exchange file.

Control Records

Use this panel to establish a link between the document type and the record sequences, data control codes, and data record names in the exchange file.

Exchange Sequence

Enter a number to represent the sequence in which this record appears in the exchange file document.

Data Control Code

Enter the code or XML tag that the EC subsystem uses to identify this type of data record in this document type.

Break Level

Enter the break level associated with this record.

Break level lets you define documents in which the same record name can be used more than once. For example, you can use Comment in both the header and in the detail. When the system processes data during transformation and encounters a duplicate record name, it looks for the record with a higher Break value than the previous instance.

Start New Transaction

Select this field if you want the data in this record to be treated as a separate transaction line. You can then process multiple transactions separately even when they are not separated by control data records.

Omit Record Code

Select this field to prevent the system from writing the record code to the output file. This field applies to exported files only.

Exchange Record Name

The system displays the name of the record from the exchange file definition.

EC Subsystem Applications

When you load records directly into the document repository, you can transform files for export without ever creating business documents in the database. Set up cross-reference records for this type of processing using this screen.

This program is similar to **EC Subsystem Exchanges**. The major difference is that you are cross-referencing file structures to the application document repository with this program, rather than to the exchange repository.

For more information, see EC Subsystem Exchanges on page 6854.

Main

Use this panel to define a unique combination of EC subsystem, document type, and application file name.

Subsystem

Enter the name of an EC subsystem defined in **EC Subsystem Definitions**.

Document ID

Enter the type of document as defined in **Trading Partners**.

File Name

Enter the name of the application file to be associated with this document type. If you have set up multiple application files with the same file name in **Application Definitions**, scroll through the unique name, version, and direction combinations and select the appropriate one.

Inbound

Select this checkbox to specify the direction of this document as inbound. Documents imported into your system are inbound, while documents exported to an EC subsystem are outbound.

Version

Enter the version of the file to be associated with this document. Multiple files can have the same name. Be sure to use the correct version for the specific file.

Control Records

Use this panel to establish a link between the document and the record sequences, data control codes, and data record names in the file.

Sequence

Enter a number to represent the sequence in which this record appears in the application file document.

Data Control Code

Enter the code or XML tag that the EC subsystem uses to identify this type of data record in this document type.

Break Level

Enter the break level associated with this record.

Break level lets you define documents in which the same record name can be used more than once. For example, you can use Comment in both the header and in the detail. When the system processes data during transformation and encounters a duplicate record name, it looks for the record with a higher Break value than the previous instance.

Start New Transaction

Select this field if you want the data in this record to be treated as a separate transaction line. You can then process multiple transactions separately even when they are not separated by control data records.

Omit Record Code

Select this field to prevent the system from writing the record code to the output file. This field applies to exported files only.

Record Name

The system displays the name of the record from the application file definition.

Implementation Definitions

EDI eCommerce includes a number of generalized application document definitions for data. You cannot directly edit these definitions. Instead, you can copy a definition and tailor it as required to accommodate the data exchange needs of a specific trading partner. In eCommerce, this definition is known as an implementation.

The system uses three definitions to correlate the specific data structure and format requirements of your system and the EC subsystem:

- The implementation definition
- An exchange file definition
- A transformation definition

Note You can use this program to modify an implementation definition you created yourself or one based on a copy of a QAD-developed template definition. However, the system does not allow you to modify a QAD-developed definition. If you attempt to do so, the program acts as an inquiry and shows the data in display-only mode. Use **Implementation Definition Copy** to copy a definition before modifying it. For more information, see Implementation Definition Copy on page 6866.

The program includes three primary panels. Optional panels display when:

- This implementation is used for mapping data to or from extensible markup language (XML) format.
- You are defining turnaround data.
- You are setting up fields that can be updated during document export.

Main

On the Main panel, you name the implementation and specify an associated application document definition.

Implementation Name

Enter or select from the lookup menu an alphanumeric name for this implementation version.

Version

Enter the version number of the document definition you are using as a template for this implementation document.

Inbound

Select this checkbox for inbound document definition or leave clear for outbound.

Multiple document definitions can have the same name and version number and be distinguished by direction.

Application Name

Enter or select from the lookup menu the name of a document definition to copy to create this implementation definition.

Version

Enter the version number of the document definition you are using as a template for this implementation document.

Description

Optionally enter a text description of this implementation. This description is for reference only.

Document Type

Optionally enter a document type for this implementation.

Document Entity

Optionally enter a document entity value for this implementation.

System Literal

Optionally enter the document type definition (DTD) used to validate that the content of exported XML files is on a public server or within a system domain.

System Location

Optionally enter the system location in the text box.

Print Gateway Error Data

Select this checkbox to print the data from the repository for each field defined in **Implementation Definitions** where Display is selected.

XML String Starting Value

Optionally enter the XML string starting value for this implementation.

Response Node Name

Enter a response node value for this implementation.

Returned Error Value

Optionally enter the returned error value in the text box.

Implementation File Records Panel

Use this panel to edit the fields copied from the application document definition or add new fields.

Sequence

The system automatically assigns the next number, but the value can be modified to any number.

Important In all cases, the first record in a document added to the repository must be sequence number 1. Other records can be numbered as you choose. The following table shows examples of valid and invalid record sequences.

Valid	Invalid
1, 2, 3, 4, 5	2, 3, 4, 5
1, 10, 20, 22, 30	10, 20, 22, 30

After you have used an implementation definition in a transformation definition, you cannot change record sequences in the implementation definition without deleting and reentering the entire transformation definition.

Record Name

Enter a name for this record. Each record name must be unique in an implementation definition.

The transformation process uses this name as the first part of the record variable, independent of the sequence number.

Note Naming conventions apply to the record names used in application document definitions and implementation definitions. When creating new definitions, refer to the naming examples provided in the table below.

Record Naming Conventions Examples

Document Type	Record Name	Description
Sales Order	HDR	Header
	HDR-EXT	Header Extended
	HDR-CMT	Header Comment
	DET	Detail
	DET-EXT	Detail Extended
	DET-CMT	Detail Comments
	DET-SOB	SO Configuration Bill
Customer Schedule	HDR	Header
	HDR-EXT	Header Extended

	DET	Detail
	DET-EXT	Detail Extended
	ATH	Authorizations
Invoice	HDR	Header
	HDR-EXT	Header Extended
	HDR-CMT	Header Comment
	DET	Detail
	DET-EXT	Detail Extended
	DET-CMT	Detail Comments
	ADDR	Address
ASN	HDR	Header
	HDR-EXT	Header Extended
	CTR-TARE-SUMM	Container Tare Summary
	TARE-HDR	Tare Header
	TARE-DET	Tare Detail
	CTR-TARE	Container Tare
	CTR-PRIM	Container Primary
	CTR-ITEM	Container Item
	ITM	Item
	ITM-EXT	Item Extended
	ITM-AUTH	Item Authorizations

Requirement

Select this checkbox to indicate that this record is required during the load or unload process. If the system cannot load or unload mandatory records, it generates an error message and does not process the associated document.

Loop Occur

Enter the number of times the processing logic loops through the records during loading or unloading.

Loop End Sequence

Enter a defined record sequence number to indicate where the loop ends. For example, enter a Loop Ends Seq value of 2 on sequence number 2 to indicate that the entire loop sequence takes place on a single record. Or, enter an end sequence of 4 on sequence number 3 to indicate a loop that starts at 3 and ends at 4.

To specify a loop structure that includes all records, enter zero or a number higher than the last record sequence defined.

Generic

Select this checkbox if this record applies generically to one or more database tables within the application. The Table field is then enabled so you can enter table names.

Table

Enter the table schema names that this record applies to. Separate multiple table names with commas. You cannot leave this field blank when Generic is Yes. If the tables do not exist, the system validates your entries and displays a warning.

XML Tag

Optionally enter the XML tag associated with this record. When the field is blank, the system uses the record name as the XML tag when transforming documents to XML format.

Add Child

On this panel, you can edit the fields copied from the application document definition or add new fields.

Sequence

Specify the sequence number of this record. The system automatically assigns the next number, but you can change the value to any number. Set up a logical numerical hierarchy for record sequence numbers.

Note It is recommended that you number the fields sequentially, beginning with 1. A total of 99 fields are then available for each record. Although the system accepts non-sequential numbers, their use is not recommended.

Field Name

Enter or modify the name of the field. This value is used with the record name, formatted as recordname.fieldname, during transformation.

Requirement

Select this checkbox to indicate that this field is required during the load or unload process or Optional to indicate that it is not. If the system cannot find mandatory fields while loading records, it generates an error message and does not process the associated record.

Type

Select the type of data stored from the drop down menu:

- AN: Alphanumeric
- D: Date
- I: Integer
- L: Logical
- R: Real number

Minimum

Enter the minimum length of this field. The system validates that required or optional data is greater than or equal to the minimum required value for the field.

Maximum

Enter the maximum length of this field.

- If the field lengths are variable and separated by the delimiter specified in **eCommerce Subsystem**, the system validates that the field length is between the Min and Max values.
- If the field lengths are fixed, the system uses this value to calculate where each field starts and ends.

Source/Destination

Select the type of variable from the drop down menu:

- G: Gateway. The gateway uses this variable type during the transfer process.
- T: Turnaround. This variable type represents imported data that is stored in the turnaround data table, indexed, and later associated with an exported document.
- D: Data entry. The operator adds this data during processing. This function is not currently implemented.

Table Name and Index Name

On implementation definitions for imported documents, enter the name of the database table and field with which this turnaround data value is associated.

Note This field is only enabled for inbound implementations. Turnaround data is not stored in the specified table. Instead, it is stored in a set of turnaround repository tables that use the table and field names as part of the index.

Retrieval Function

For exported documents, enter the name of the function defined in **eCommerce Function** that retrieves the turnaround data from the

database and adds it to the outbound document. When you enter a valid function, the system displays the parameters from the function definition for update.

Note The QAD function GetTadData is provided for turnaround data retrieval.

Gateway Variable

Enter or select from the lookup menu the name of the variable associated with this field. The gateway program uses this variable to move data into the application. The default variable is copied from the associated application document definition.

Default

Enter the value to include in the field when Display is No. When that is the case, the system does not prompt for a value during processing.

Default Value

This field is used when you are defining fields to be included in custom reports that are printed based on the inbound documents from this implementation definition.

Specify the number of characters in the field and the text to be displayed in the column label, separated by a slash "/"character; for example, 4/Year results in a 4-character field that is labeled Year. When this field is blank, the report values default from the record length and name in the implementation definition.

Note For this field to have any effect, you must set Display to Yes.

Field Help

Enter text to display at the bottom of the data entry screen when the cursor is in this field during editing. For example, you can describe the type of data or values to enter.

Validate

Select this checkbox to activate the validation process for all documents using this implementation definition. The setting applies to both inbound and outbound documents.

Field Prompt Conditions

Enter the type of prompt condition for the implementation.

Display

This field is used under the following circumstances:

- When you are defining fields to include in custom reports that are printed for inbound documents created based on this implementation definition. To define a field length and column label for a custom report in the Default Value field, select the Display checkbox for the field to be included in the report.

- When Print Gateway Error Data is selected on the Main panel. Select the Display checkbox so that field data displays when errors occur.
- When the implementation is for an exported document such as an invoice or ASN, and you want the system to display a prompt to update a value during export. Select this checkbox for the data entered in the Default Value field to display when the document is exported.

Edit

Select this checkbox to have this field display for editing when you specify Update or Both in the Update/Export/Both field of **Shipment ASN Export** or **Invoice Export**. For more information, see Exporting Documents on page 6921.

Display on Child Frame

This value is used during the export update process. When this checkbox is selected this functions like the Display option but instead displays field on a secondary screen, retaining the information previously displayed.

XML Tag

Optionally enter an XML tag name associated with this field. If you do not enter a value, the system uses the field name as the tag.

XML Tag Type

Select this checkbox for Element and leave clear for Attribute to indicate the type of XML tag.

Namespace

Optionally enter the XML namespace associated with this field.

In XML, a namespace is a unique identifier for a collection of element type and attribute names. The namespace lets you use identical type and attribute names for multiple purposes based on the namespace identifier.

Insert Prior To

Enter the parent sequence number. When this implementation creates XML documents, specify the sequence number of the record before which you want to insert the value of this field.

Prior To Description

This field displays the record name of the parent record.

Note If the Insert Prior To number is anything other than the parent sequence number, this field displays unknown.

Implementation Definition Copy

For more information, see Implementation Definitions on page 6858.

Source Application File, Version, Inbound

These fields specify the document definition associated with the application definition you want to copy.

Source Implementation File, Version

These fields specify the document definition associated with the implementation definition you want to copy.

Destination Implementation File, Version

Specify a unique combination of file name and version to identify the new implementation definition.

Implementation Definition

Filter

Document Name

Specify the name of the document to be included in this report.

You can also specify a range of document names.

Document Version

Specify the version of the first document to be included in this report.

You can also specify a range of document versions.

Implementation Name

Specify the name of the first implementation document to be included in this report.

You can also specify a range of implementation document names.

Implementation Version

Specify the version of the first implementation document to be included in the report.

You can also specify a range of implementation document versions.

Inbound

Select Yes if the direction of the documents to which conversion applies is inbound.

Select No if the direction of the documents is outbound.

Transmission Groups

Transmission groups consolidate multiple trading partners by network location so that outbound documents can be batched appropriately. For example, you can create a transmission group for all the trading partners on one value-added network (VAN).

When you set up trading partners who receive documents exported from your system, you assign them to a transmission group. This relationship indicates such information as where the system places outbound files for the trading partner.

Use **Trading Partners** to assign a trading partner to a transmission group.

Main

Transmission Name

Enter a name for the transmission group.

This field is mandatory.

Description

Enter a description of the transmission group, such as a company name.

Destination Directory

Enter the directory where exported SNF files associated with this group are written.

This field is mandatory.

Processing Script

Optionally enter the file name of a custom script that is run after a group of documents is created. For example, this script can invoke an e-mail program to transmit the exported files to the trading partner.

Processing Program

Enter the path name to an executable program that runs when a file is exported to this transmission group. For example, the processing program can be an email program that transmits the file to a trading partner.

To specify a processing program on a different computer, use the Remote Host Name field in **eCommerce Subsystem** for the EC subsystem associated with this transmission group.

Subsystem

From the lookup, specify the EC subsystem associated with this transmission group. You must define this subsystem in **eCommerce Subsystem**.

This field determines the file extension used for the SNF files sent to trading partners assigned to this transmission group.

This field is mandatory.

File Name Counter

Specify the sequence ID that is used to assign file names to files exported to this transmission group. It must be a valid sequence ID defined in **Number Ranges**.

This field is mandatory.

Capitalize Outbound Data

Select this field to convert the data in exported files for this transmission group into all capital letters.

Target Code Page

Specify the code page that the receiving application requires for files sent to this transmission group. When creating the export file, the system converts the data as required to match the specified code page.

This field is not validated. Be sure that the value you enter is included in the Progress file DLC/convmap.cp. Otherwise, the conversion program returns an error.

Transmission Groups Report

Filter

Transmission

Specify a transmission code or range of transmission codes that you want to include in the report.

Transformation Definitions

The system uses a transformation map in combination with an exchange file definition and an implementation file definition to exchange data between your system and an external EC subsystem. The resulting output meets the specific data structure and format requirements of both systems.

Note You can use this program to modify a transformation definition you have created yourself or one based on a copy of a QAD-developed definition. However, the system does not allow you to modify a QAD-developed definition. If you attempt to do so, the program acts as an inquiry and shows the data in read-only mode. Use the Copy action to copy a definition before modifying it. For more information, see Transformation Definitions Copy on page 6874.

Main

Use the Main panel to:

- Name the transformation definition.
- Identify the combination of an existing exchange file definition, application document definition, and specific implementation that uses this transformation map.
- Set up two fields for testing the transformation map. The Can Run and Debug Level options can be especially valuable when you are testing a new implementation for a new trading partner or document.

Transformation

Enter a name for this transformation definition.

Inbound

Select this field for inbound documents that are transformed using this definition. Documents imported into your system are inbound, while documents exported from your system are outbound.

Two transformation definitions can have the same name and be distinguished only by direction.

Exchange File Name, Version

Enter or select from the lookup menu the name of the exchange file definition used in this transformation. The version automatically updates based on the exchange file.

Application, Version

Enter or select from the lookup menu the document definition used in this transformation. The version number updates automatically based on the definition selected.

Implementation Name, Version

Enter or select from the lookup menu the implementation definition used in this transformation. The version number updates automatically based on the implementation selected.

Can Run

Select this checkbox to make this transformation map operational.

During testing, you can leave the checkbox clear. The system then runs the entire transformation process, but backs the data out of the repository instead of storing it. You can identify transformation mapping problems and correct them before changing to selected, letting the data be saved in the data repository.

Debug Level

Specify a value from 0 through 9 to indicate the level of detail that is reported in the activity file created when this transformation is run. Lower levels provide less detail. For example, you can set the field to 9 during testing to get a complete record of what happens during transformation processing.

Note Leaving this field set to a high value can produce large files and can lead to disk space problems.

Many to Many

Select this checkbox to combine multiple input documents and treat them as one document. This setting lets the system back out multiple files or create a single output from several inputs.

If left clear, the system always maps one input document to one or many output documents, depending on how many times the transformation definition indicates that a new header should be written.

Before displaying the second panel, the system creates variables from the exchange file and the implementation associated with this transformation definition. Only these and user-defined variables can be used during transformation, along with the following automatically assigned variables.

tp-id	map-name
tp-document-id	map-exf-vers
tp-message-nbr	map-imp-name
tp-func-grp-nbr	map-imp-vers
tp-interchange-nbr	map-mfg-name
tp-document-nbr	map-mfg-vers
tp-doc-dir	map-exf-name
tp-site	map-many-to-many

tp-address	map-debug-level
tp-token-val-list	map-can-run
mfg/pro-site	current-exf-seq
mfg/pro-address	current-mfg-seq
	conditional-rec-flushed

The trading partner variables correspond to tokens. The system uses MFG/PRO-SITE and MFG/PRO-ADDRESS to determine the customer address and the site code automatically, based on the cross-reference defined in **Trading Partners**. You can also assign these values as an event that takes place during transformation. Other variables contain information associated with the transformation definition.

Transformation File Records

This panel displays the events and actions associated with the current transformation definition records. The records are always related to the direction of the document. For example, an inbound document always displays exchange file record names.

To define a new event, click New. To delete the current selection, click Delete. Confirm the deletion when prompted.

Note The system provides a set of editing tools that let you modify existing records without deleting them.

Record Name

Select from the look up menu the record for this event from the Transformation Variable lookup.

Event

Select the type of event:

- Loop-Entry
- Record-Entry
- Field-Entry
- Loop-Exit
- Record-Exit
- Field-Exit

Sequence

The system automatically assigns the next number but it can be changed to any sequence number in which this event occurs.

Note When setting up event qualifiers, consider using increments of 10 so you can later insert intermediate sequence numbers. If necessary, you can use editing options to resequence events, as

described in Editing Transformation File Records on page 6873. Alternatively, use the **Renumber Button** to update all the event sequence numbers automatically and to leave space between numbers in which to insert new events.

Event Qualification

This field is set by default to Each value.

Note The current version of eCommerce uses only the Each option.

Type

Specify the type of action that the system performs from the drop down menu:

- Equate: Set the target equal to the source.
- Read: Read the target record fields into memory. This type can be used only with an input record.
- Clear: Remove the target record fields from memory.
- Write: Write the target record to the database. You can only write an output record. You must write a header record before another record can be written. Write can be used optionally with the QAD-provided check-hash function, which determines the header for which the system writes the detail.
- New: Logical placeholder documenting the initialization of new outbound records.
- Loop: Loop through the records already read into memory.
- EndLoop: End a loop. Does not require a source or target.
- If: Conditional logic based on the source and source qualifier. The If statement must return a value of True or Yes. It allows the use of Else and Endif and does not require a source or target.
- Endif: End of an If statement. Endif does not require a source or target.
- Else: Logical branch between If and Endif statements. Else does not require a source or target.
- Repeat: Repeats a section of transformation event actions a specified number of times.
- EndRepeat: Ends the section of transformation event actions that the previous Repeat action repeats.

Target Qualification

Select the form of data to be specified as the target for this event. This setting determines valid values for the Target field:

- I: Input data
- O: Output data

- V: Variable

Target

Specify the name of the target or use the lookup option to find available targets.

Source Qualification

Select the form of data to be specified as the source for this event. This setting determines valid values for the Source field:

- I: Input data
- O: Output data
- V: Variable
- C: Constant
- F: Function
- S: Sort (only allowed for Loop event type)

If you specify a function and enter its name in Source, another panel lets you modify it as needed for this specific instance. Some functions are provided with eCommerce. However, you can also define your own functions with **eCommerce Function**. Use **eCommerce Function Copy** to copy an existing function before modifying it as required.

Source

Specify the source for this transformation or use the lookup menu to find a source.

Editing Transformation File Records

Transformation Definitions includes editing options that let you—among other actions—modify current event records without deleting and re-entering them.

Edit

Use this option to update a transformation map event. You can change the event type, qualifier, target, source, and sequence. If the event action calls a function, you can reset the parameter values or change to a different function.

Create Gap

The system prompts you to specify the length of the gap in sequence numbers that the system creates after the selected event. For example, if focus is on event action sequence 60 and you set the Create Gap Of field to 100, the system adds 100 to all the subsequent events. So, if the next sequence numbers were 70, 80, 90, the system would set the sequence numbers for the record to 60, 170, 180, 190, and so on.

Delete Block

The system displays a selection range for the current record. The defaults cover all the action event sequence numbers for the record. Leave the fields as-is to delete all the events for the record, or modify the range to include the events you want to remove.

Copy Block

Use this function to copy a specified range of event actions to the current transformation map or any other map in the system.

The system prompts you for the range of sequence numbers you want to copy. The default range is from the current event through the last one in the record. You then specify the destination of the copied events. The defaults represent the current record and transformation map.

The new events start with the specified Destination Sequence; the system maintains the increments between the source events when assigning new sequence numbers. For example, if you copy sequence numbers 10, 15, 20 and specify a Destination Sequence of 21, the new events are numbered 21, 26, 31. The new sequence maintains the original increment of 5 between events.

Renumber

The system prompts you for an Interval—the new starting sequence number for each record in the transformation map, as well as the increment between event sequences. The system disregards the current sequences and begins each record with the specified value. For example, if you set Interval to 5, the system renumbers the events in each record as 5, 10, 15, 25, 35, and so on.

Transformation Definitions Copy

For more information, see Transformation Definitions on page 6869.

Source Transformation

This field displays the selected transformation to be copied.

Transformation Inbound

This field is selected for an inbound transformation. Documents imported into your system are inbound, while documents exported from your system are outbound.

Destination Transformation

Enter the name of the new transformation definition.

In the remaining fields, enter or select from the lookup menu the names and versions of the exchange file, application, and implementation definitions that are used with the new transformation definition.

Transformation Definitions Report

Filter

Name

Specify the name of the transformation definition that you want to use for the report.

Note You can select a range of transformation definitions from the lookup.

Print Direction In

Select Yes to print inbound records on the report.

Print Direction Out

Select Yes to print outbound records on the report.

Print Sequences

Select Yes to print sequences on the report.

Print All Events

Select Yes to print all events on the report.

Print Details

Select Yes to print details on the report.

Trading Partners

Trading Partners allow you to communicate business transactions for specific customers. This screen is used to:

- Identify the document types that are exchanged with each trading partner.
- Set up cross-references between trading partner documents and QAD Adaptive.
- Cross-reference the trading partner's site and address codes to the codes used in QAD Adaptive.
- Set control values used during document processing.

Main

Trading Partner ID

Enter an alphanumeric identification code for this trading partner. This ID must be the same as the code used in the SNF file control record for the tp-id token.

Name

Enter an identifier for this trading partner. This value is for reference only.

Group

Optionally, enter the name of a trading partner group. You can use this group name to associate multiple trading partners for reporting purposes.

Application

Enter or select from the lookup menu a code representing the application to which this record applies.

The field on the Main panel defaults to EDI. You can change it as required. That value defaults to new records created on the Trading Partner Document Records panel; that value in turn defaults to new TP location cross-reference records.

Counters: Inbound Exchange, Outbound Exchange, Inbound Application, Outbound Application

Specify the sequence IDs that are used to assign numbers to repository documents during processing for this trading partner.

These fields are optional. If you enter a value, it must be a valid sequence ID defined in **Number Ranges**.

Use Primary Reference ID

Select this checkbox to have the system use a reference ID number provided in the document being processed, rather than using a sequence ID defined in **Number Ranges** to generate an ID number.

This field defaults to the Trading Partner Document Records panel for new records.

When you use this feature, assign the token PRIMARY-REF-ID to a field in the exchange file, application, and implementation definitions to represent the reference ID.

Note If this field is selected and the token is not assigned in a required definition, the system uses the appropriate sequence ID specified on the eCommerce Transaction Control panel of **eCommerce Control** to generate a number.

Suppress Warnings

Select this checkbox to prevent the system from generating status messages that result from warning conditions during transformation or gateway processing.

When this field is left clear, the system always generates warnings in the status message table.

This field defaults from **eCommerce Control**. It defaults to the Trading Partner Document Records panel for new document records.

Stop on Error

Select this checkbox to have the system stop processing a document during transformation when the first error is encountered. The system skips the rest of the document and moves to the next sequence number.

When this field is clear, processing continues regardless of the number of errors that occur.

This field defaults from **eCommerce Control**. It defaults to the Trading Partner Document Records panel when you set up a new document record.

Suppress Session Report

Select this checkbox to prevent the system from generating a session report following document load or unload.

When this field is clear, the system always generates session reports.

This field defaults from **eCommerce Control**. It defaults to the Trading Partner Document Records panel when you set up a new document record.

Document Records

Set up a separate record for each document type exchanged with this trading partner.

Trading Partners Document ID

Select from the lookup menu the document type exchanged with this trading partner. For example, TP Doc ID can be 810 to indicate an

invoice exported in the ANSI X12 810 format. This value must be the same as the code used in the SNF file control record for the tp-document-id token.

Inbound

Specify whether this record applies to inbound or outbound records. This field lets you distinguish between two trading partner records with the same document type by making one inbound and the other outbound.

Document Map

Select from the lookup menu the name of the transformation map that the system uses in converting the data in this record for this combination of trading partner, document type, and direction. You must define this transformation map in **Transformation Definitions**.

For more information, see Transformation Definitions.

Transmission Group

Enter the name of the transmission group associated with this trading partner for this document type. You must define this group in **Transmission Groups**. The field is mandatory for outbound documents.

For more information, see Transformation Definitions.

Token List

Optionally enter a comma-separated list of valid tokens for the system to use to differentiate between multiple trading partner cross-references to the same combination of site and ship-to address. These values are used to determine the source of imported documents.

Enter enough tokens and values to create a unique combination of trading partner site, trading partner address, and tokens for each instance where trading partner site and address are the same.

Track Document

Select this checkbox for the system to automatically generate tracking records when exporting documents of this type to this trading partner. The system can then import acknowledgment and status messages from the EC subsystem and update the tracking records as required.

When this field is left clear, tracking records are not created and imported acknowledgments are disregarded.

Note Documents are tracked only when the Primary Reference field in the exchange repository master record contains a value. For example, this reference can be a purchase order, invoice, or ASN number.

Expect Acknowledgment

Select this checkbox for the system to create a tracking record each time it exports this type of document to this trading partner.

When Expect Acknowledgment is selected, the system leaves the Acknowledgment Status field in the tracking record blank until importing an acknowledgment message from the EC subsystem. When Expect Acknowledgment is clear, the system automatically sets Acknowledgment Status to None Expected. The system can still update the Acknowledgment Status field by importing a status message.

Save Repository Data

Select this checkbox for the system to save any records created in the repositories when processing this document.

If this checkbox is clear the system deletes repository records related to this document after processing is completed.

Document Group

Optionally, enter the name of a trading partner document group. You can use this group name to associate multiple trading partners for reporting purposes.

Application

Enter a code representing the application to which this record applies. This field defaults from the Main Trading Partner panel. It defaults to the TP Location Cross-Reference panel when you set up a new cross-reference record.

Exchange, Application Counter

Specify the sequence IDs that are used to assign numbers to repository documents for this trading partner.

These fields are optional. If you enter a value, it must be a valid sequence ID defined in **Number Ranges**.

Use Primary Reference ID

Select this checkbox to have the system use a reference ID number provided in the document being processed to generate an ID number, rather than using a sequence ID defined in **Number Ranges**. This field defaults from the initial trading partner setup panel.

When you use this feature, assign the token PRIMARY-REF-ID to a field in the exchange file, application, and implementation definitions to represent the reference ID.

Note If this field is selected and the token is not assigned in a required definition, the system uses the appropriate sequence ID specified on the eCommerce Transaction Control panel of **eCommerce Control** to generate a number.

Suppress Warnings

Select this checkbox to prevent the system from generating status messages that result from warning conditions during transformation or gateway processing.

When this checkbox is clear, the system always generates warnings in the status message table.

This field defaults from the initial trading partner data panel. It defaults to the TP Location Cross-Reference panel when you set up a new cross-reference record.

Stop on Error

Select this checkbox to have the system stop processing a document during transformation when the first error is encountered. The system skips the rest of the document and moves to the next sequence number.

When this checkbox is clear, processing continues regardless of the number of errors that occur.

This field defaults from the initial trading partner data panel. It defaults to the TP Location Cross-Reference panel when you set up a new cross-reference record.

Suppress Session Report

Select this checkbox to prevent the system from generating a session report following document load or unload.

When this checkbox is clear, the system always generates session reports.

This field defaults from the initial trading partner data panel. It defaults to the TP Location Cross-Reference panel when you set up a new cross-reference record.

Note For additional fields, select New Line button to display an additional panel that lets you enter or edit trading partner cross-reference information.

TP Location Cross-Reference Panel

This panel lets you set up cross-references between the trading partner's site and address codes and the codes in your system. The system uses these cross-references during the transformation process to automatically identify such information as the customer's site and address. Without the cross-references, you must use **Transformation Definitions** to assign the MFG/PRO-SITE and MFG/PRO-ADDRESS variables before the output header record is written. Otherwise, the system generates a transformation error message.

Trading Partner Site and Trading Partner Address

Enter the site and address codes used by the trading partner. Several different site and address combinations can exist at this level. For example, one cross-reference can be for the trading partner (sold-to) and the others for the ship-to addresses.

For inbound documents, the combination of trading partner site and address provides a cross-reference to the site and address. For outbound documents, the transformation process determines the trading partner site and address codes using the following three elements:

- Application document definition name and version
- Implementation name and version
- Site and address codes from your system

Token Values

Enter a comma-separated list of values associated with the tokens entered in Token List on the previous panel. Be sure that there is one-to-one correspondence between tokens and values.

On imported documents only, the system uses these values to differentiate between multiple trading partner cross-references to the same combination of site and address.

Site and Address

Enter cross-references from the trading partner site and address to the site and address codes in your system.

Note Site and Address are not validated against master records defined in your system.

Export

Select this checkbox for the system to export this document type to this combination of site and address for this trading partner.

In an environment with more than one trading partner cross-reference mapped to the same combination of site and address, this field lets you limit the trading partner addresses that are selected to receive exported documents. For example, send an ASN both to a ship-to customer and to the central ordering point that placed the order by having a cross-reference record for each and selecting Export for both.

This field can be updated only when the Direction field for a trading partner document ID is Out.

Note This option is only enabled for Outbound records.

Transmission Group Override

Enter or select from the lookup menu the transmission group for this record.

Suppress Warnings

Select this checkbox to prevent the system from generating status messages that result from warning conditions during transformation or gateway processing.

When this checkbox is clear, the system always generates warnings in the status message table.

This field defaults from the Trading Partner Document Records panel.

Stop on Error

Select this checkbox to have the system stop processing a document during transformation when the first error is encountered. The system skips the rest of the document and moves to the next sequence number.

When this checkbox is clear, processing continues regardless of the number of errors that occur.

This field defaults from the Trading Partner Document Records panel.

Suppress Session Report

Select this checkbox to prevent the system from generating a session report following document load or unload.

When this checkbox is clear, the system always generates session reports.

This field defaults from the Trading Partner Document Records panel.

Application

Enter a code representing the application to which this record applies. This field defaults from the initial trading partner data panel. It defaults to the TP Location Cross-Reference panel when you set up a new cross-reference record.

Email

To add an email address for the Trading Partner Site, click Add Child.

Specify complete email addresses; for example, jsmith@company1.com.

You can also specify whether the system sends email to the address only when a processing error occurs.

Select New Line to enter one or more email addresses of individuals who receive process status notifications regarding documents that use this trading partner location cross-reference.

Use **Users** to set up your system to manage automated email messages.

Error Only

Select this checkbox for the system to send email notification only on error files.

EDI Component Load

Main

Input Directory

Enter the input directory.

Auto Rename Using Source ID

Select from the drop down menu:

- No: This is the default value.
- P: The file will be renamed and prefix will be added with the source ID mentioned on the unload screen.
- S: The file will be renamed and suffix will be added with the source ID mentioned on the unload screen.

Import

Select All

Enter Yes to import all documents.

When this field is No, you can select documents from the grid to import.

To load the selected documents, click Save.

EDI Component Unload

Users can select the domain, trading partner, document and unload all the data in the provided dump path. For more information, see Trading Partners.

Main

Export Domains

Using the lookup, select the domain to be unloaded.

Dump Directory

Enter the path where the unloaded file is to be saved.

Use TP Domain As Source ID

When you select this field, the file name is based on the TP Domain.

Source ID

This field is enabled when Use TP Domain as Source ID is unchecked. Enter the desired name for the unloaded file.

Trading Partners

Select All

When you select this field, all Trading Partners are selected for export.

When this field is not selected, the documents still display, but none are initially selected. However, you can select documents as needed in the Export column.

Documents

In this section, you select components for unload.

Select All

Select this field to select all document types for export.

When this field is not selected, you can select or deselect documents of these types:

- Subsystem
- Subsystem / Document Xref
- Subsystem / Application Xref
- Document Definitions
- Application Definitions
- Implementations Definitions
- Transformation Definitions
- User Defined Functions
- Transmission Group Definitions
- HTTP Adapter Definitions
- Trading Partner
- Trading Partner Documents
- Trading Partner Location Xref
- Trading Partner Parameters
- Email Notification Addresses
- Bank Payment Attributes
- Turnaround Data
- Data Cross Reference
- Data Validation
- eCommerce Number Ranges

To unload the selected documents, click Save.

Trading Partners Report

Filter

Trading Partner ID

Specify a trading partner ID defined in Trading Partner using the lookup menu. This conversion will apply only to documents involving this trading partner.

Update Token Variables

Filter

Update

Select Yes to update token variables for the existing trading partner token records.

Note This field is set to No by default.

Conv of Send EDI Invoices to Char

Use the **Conv of Send EDI Invoices to Char** utility when migrating from an older system that uses a boolean parameter to indicate whether to send EDI invoices. This program enables you to convert the boolean parameter *Send EDI Invoices* with a value of Yes/No to the character parameter *Invoice Method* with the possible values "P" paper, "E" EDI, or "B" both.

Note The conversion also works for the boolean parameters Send EDI Invoice and Send Invoices.

When you run the report with Update Invoice method equals no, no changes are made. To convert the boolean parameter to the Invoice Method parameter with a character value, run the report with Update Invoice method equals yes. The change of parameter is applied automatically to trading partner libraries in all domains.

You can verify the conversion in **Trading Partner Parameters**.

EDI Processing

The fields in this screen are non-editabled.

Main

Process Date

This field specifies the date that this record was processed.

Process Time

This field specifies the time that this record was processed.

Document ID

This field specifies the document ID.

Direction

This field specifies whether the document was inbound or outbound.

QAD Reference

This field specifies the QAD reference for this record.

Document Group

This field specifies the document group for this record.

Document Link

This field specifies the document link for this record.

Status

This field specifies the status of the current record.

QCE Status

This field specifies the QCE status of the current record.

Error Level

This field specifies the error level.

File Processed

This field specifies when the file was processed.

Last Session

This field specifies the last session.

Batch

This field specifies the batch associated with the current record.

Ignore

This field specifies whether to ignore the current record.

Trading Partner

Trading Partner ID

This field specifies the trading partner ID.

Trading Partner Site

This field specifies the trading partner site.

Trading Partner Address

This field specifies the trading partner address.

TP Reference

This field specifies the trading partner reference.

Trading Partner Group

This field specifies the trading partner group.

Application

Application Reference ID

This field specified the application reference ID.

App Sequence

This field specifies the application sequence.

Application Link

This field specifies the application link.

Application Status

This field specifies the application status.

Application Site

This field specifies the application site.

Application Address

This field specifies the application address.

Application

This field specifies the application name.

Exchange

Exchange Reference ID

This field specifies the exchange reference ID.

Exchange Sequence

This field specifies exchange sequence.

Exchange Status

This field specifies the exchange status.

Acknowledge Link

This field specifies the acknowledge link.

Inbound

This field specifies if the file direction is inbound.

Messages

Message Level

This field specifies the message level.

Status

This field specifies the status of the message.

Message Text

This field displays the message text.

Change Exchange Status

When you select this action, the following message is displayed:

Exchange Status changed successfully from Passed to Failed.

Change Application Status

When you select this action, the following message is displayed:

Application Status changed successfully from Passed to Failed.

Document Import

Use the **Document Import** action in two ways:

- To start the process of loading SNF files from the EC subsystem, transforming them into usable formats, and transferring them into the database using a gateway program. For more information, see Imports on page 6830.

  This feature also lets you import files containing documents used in EMT. Ordinarily, you use eCommerce Manager to import such files. However, **Document Import** lets you select individual files from the specified import directory.

- To load files from the EC subsystem directly into the data repository. This feature lets you transform inbound files and export them again without creating business documents.

The system generates a report on imported files to the device specified in Output. You can choose to run this process later using the Batch ID field.

Note The system associates several field values with your user ID. Next time you run this program, the field defaults to the same values you entered previously.

Main

File Type

Specify the type of files to be listed in the Select File(s) frame.

- Select New to display a list of unprocessed files located in either the Inbound Directory or the Outbound Scan Directory specified in **eCommerce Control**, depending on the setting of the Inbound field.
- Select Error to display only files containing documents that encountered errors during previous imports. These files are located in either the Error File Directory or the Outbound Error Directory specified in **eCommerce Control**, depending on the setting of the Inbound field.

Inbound

Specify the source of the files the system selects for import:

Select the checkbox to select files from the directory specified in the Inbound Directory field in **eCommerce Control**. It then imports EDI documents to the exchange repository based on a standards-neutral format (SNF) by transforming them using specified maps. The system then places the records in the application document repository and loads them into the database.

Leave the checkbox unselected to select files from the directory specified in the Outbound Scan Directory field in **eCommerce Control**. Instead of using exchange records based on an SNF, the system imports these files directly into the application document repository for processing.

For more information, see eCommerce Control on page 6839.

For example, specify this directory as the source of files that are provided by an external system and are then transformed and exported using EDI eCommerce without creating business documents.

For more information, see Direct Import to Application Repository on page 6826.

Pre-Select All

Select the checkbox in this field to have all files selected—that is, marked with an asterisk (*)—when displayed in the grid below. If the checkbox is not selected, the files still display, but none are initially selected.

Input Directory

This field specifies the directory path to the location of the files to process.

The field defaults from **eCommerce Control** and is non-editable.

File Mask

Specify one or more patterns, including wildcards (*), for the system to use in selecting files for processing. For example, if you enter *.GEN, the system selects all files with an extension of GEN. Separate multiple entries with commas.

Grid

Select

Select the checkbox of the file that you want to process.

File Name

This field specifies the name of the files that you can select for processing.

Processing Options

Process In Background

Select this checkbox to process the imported files in the background.

Background Processing Description

Optionally enter a short description for the import.

Click Save to process the files that you have selected.

eCommerce Manager

When clicking the Save button, the system will process all files located in the designated input directory. To process files with a specific extension, enter the desired extension in the File Mask field. The system will then only process files matching that extension.

eCommerce Manager

Export ASN

Select this checkbox to process ASN files.

Export PO Change

Select this checkbox to process PO change files.

Export PO Change Acknowledgement

Select this checkbox to process PO change acknowledgement files.

Export PO

Select this checkbox to process purchase order files.

Export PO Acknowledgement

Select this checkbox to process purchase acknowledgement order files.

Export Supplier Schedule

Select this checkbox to export supplier schedule files.

Reprocess EMT failed document

Select this checkbox to reprocess EMT failed documents.

Import Files

Select this checkbox to have the system automatically search for and process files in the inbound directory specified in eCommerce Control.

Input Directory

This field contains the input directory path and cannot be edited.

File Mask

Specify one or more patterns, including wildcards (*), for the system to use in selecting files for processing. For example, if you enter *.EDW, the system selects all files with an extension of EDW. Separate multiple entries with commas.

Import Reprocessing

After resolving a problem with import or export processing, use the appropriate program—**Import Reprocessing** or **Export Reprocessing**—to repeat processing for selected process sequence numbers. Based on the status of the document, the system automatically begins the processing flow from the point the error occurred.

Import Reprocessing

Pre-Select All

Enter Yes to have all documents selected—that is, marked with an asterisk (*)—when displayed on the selection list. When this field is No, the documents still display, but none are initially selected.

When the list displays, you can select or deselect documents as needed.

Export Reprocessing

After resolving a problem with import or export processing, use the appropriate program—**Import Reprocessing** or **Export Reprocessing**—to repeat processing for selected process sequence numbers. Based on the status of the document, the system automatically begins the processing flow from the point the error occurred.

Export Reprocessing

Pre-Select All

Enter Yes to have all documents selected—that is, marked with an asterisk (*)—when displayed on the selection list. When this field is No, the documents still display, but none are initially selected.

When the list displays, you can select or deselect documents as needed.

Using Other Setup Programs

Several other programs on the eCommerce menu support initial setup and system maintenance:

- **Trading Partner Parameter Maint (35.13.10)**
- **Data Cross-Reference Maintenance (35.13.16)**
- **HTTP Adapter Maintenance (35.13.19)**
- **Data Validation Maintenance (35.13.21)**
- **Application Definition Maintenance (35.15.10)**
- Definition copy programs
  - **Exchange Definition Copy (35.15.1)**
  - **Application Definition Copy (35.15.2)**
  - **Implementation Definition Copy (35.15.3)**
  - **Transformation Definition Copy (35.17.1)**
- **eCommerce Function Maintenance (35.15.21)**
- **eCommerce Function Copy (35.17.2)**
- **Transformation Renumber Utility (35.17.3)**
- **Export/Import Controller (35.17.5)**
- Programs to unload and load document definition
  - **Trading Partner Library Load (35.17.7)**
  - **Trading Partner Library Unload (35.17.8)**
- For managing obsolete trading partner document setup records, **Trading Partner Document Delete (35.17.10)**

Data Cross-References

You can use this function to perform unit-of-measure conversions between an incoming trading partner document and the target business document in your system.

Main

Trading Partner Document ID

Enter the trading partner document to which this conversion applies.

Inbound

Select this field to specify the direction of the documents to which conversion applies as inbound. Documents imported into your system are inbound, while documents exported to the EC subsystem are outbound.

Trading Partner ID

From the lookup, specify a valid trading partner ID defined in **Trading Partners**. This conversion applies only to documents involving this trading partner.

Document Name

From the lookup, specify the document definition to which this conversion applies, defined in **Application Definitions.**

Version

Enter the document version to which this conversion applies.

Record Sequence

Enter the sequence number of the record that is modified during the conversion.

Field Sequence

Enter the sequence number of the field that is modified during the conversion.

Initial Value

Enter the target value that is converted, indicating how the field reads before conversion.

Converted Value

Enter the new value, indicating how the field will read after conversion.

Data Cross-References

Filter

Trading Partner Document ID

Specify the trading partner document ID for this conversion.

Trading Partner ID

From the lookup, specify a valid trading partner ID defined in **Trading Partners**. This conversion applies only to documents involving this trading partner.

Document Name

From the lookup, specify the document definition you want to use for the report, defined in **Application Definitions**.

Inbound

Specify the direction of the documents you want to use for the report, select yes for inbound documents.

Note Default value is set to No.

Trading Partner Parameters

The system creates a parameter record for each unique combination of trading partner address and site specified in **Trading Partners**. If you delete an address and site combination in **Trading Partners**, the parameter record for that combination is also deleted.

System-generated default values for some standard parameters are created at the same time the record is generated. Several of these parameters are used to specify values required by the import and export gateway programs. For example:

- Logical fields for a trading partner determine which types of documents you exchange with that partner.
- Another logical field specifies whether purchase orders imported from this trading partner are entered as confirmed sales orders.
- Character and integer parameters provide the gateway programs with the names and version numbers of the application document definitions used in processing.

Use **Trading Partners** to identify the document types that are exchanged with each trading partner and to set up cross-references between trading partner documents and your system.

Select a record from the browse to view and edit data.

Main

Note The fields in this panel are automatically populated and cannot be edited.

Application Address

This field specifies the application address of the trading partner whose parameters are defined in this record.

Application Site

This field specifies the application site code of the trading partner whose parameters are defined in this record.

Trading Partner Address

This field specifies the trading partner address of the trading partner whose parameters are defined in this record.

Trading Partner Site

This field specifies the trading partner site of the trading partner whose parameters are defined in this record.

Logical

Click New to add logical parameters for this record.

Parameter Description

Enter an alphanumeric description of the logical parameter.

Logical Parameter Value

Select this field to define the logical value of this parameter.

Character

Click New to add character parameters for this record.

Parameter Description

Enter an alphanumeric description of the character parameter defined in the Character Parameter Value field.

Character Parameter Value

Specify a value for the character parameter.

You can enter a maximum of 40 characters in this field.

Date

Click New to add character parameters for this record.

Parameter Description

Enter an alphanumeric description of the date parameter defined in the Date Parameter Value field.

Date Parameter Value

Specify a value for the date parameter.

Integer

Click New to add integer parameters for this record.

Parameter Description

Enter an alphanumeric description of the integer parameter defined in the Integer Parameter Value field.

Integer Parameter Value

Specify a value for the integer parameter.

You can enter a maximum of 9 characters in this field.

Decimal

Click New to add decimal parameters for this record.

Parameter Description

Enter an alphanumeric description of the decimal parameter defined in the Decimal Parameter Value field.

Decimal Parameter Value

Specify a value for the decimal parameter.

You can enter a maximum of 8 characters before the decimal and 2 characters after the decimal.

Trading Partner Parameters Update Descriptions

Trading Partner Parameters Update Descriptions updates all of the existing trading partner parameter description records in the current domain, so that they fit within the 25 character width meaningfully. You must run this utility for all other domains that contain eCommerce data. The following changes are made to all the existing parameter descriptions, wherever applicable in the current domain:

- Replace Document with Doc in Character and Integer descriptions.
- Replace Change with Chg in Character and Integer descriptions.
- Replace Ver with Vers in all Integer descriptions.

Filter

Update

Select Yes to update the records in the current domain.

Select No to leave the records unchanged.

HTTP Adapter Maintenance

Associate connection records with trading partners using **Transmission Group Maintenance (35.13.13)**. While sending records to that transmission group, the system passes the specified connection information and parameters, along with the XML data itself, to the receiving server using an HTTP adapter program.

For more information, see Transmission Groups on page 6867.

Main

HTTP ID

Enter an alphanumeric code identifying this HTTP connection record. You reference this code in **Transmission Group Maintenance** to associate XML files with the server that receives them.

Version

Enter the HTTP version number associated with the parameters in this record.

HTTP URL

Enter the URL address on the specified host where the XML data is made available for the external application.

Content Type

Enter the type of content included in the files that are posted using this parameter record. Typically this value is text/xml.

Character Set

Enter the character set associated with the files that are posted using this parameter record; for example, utf-8.

Host Name

Enter the host name of the server to which the data is posted.

Service Name

Enter the port number on the specified host that your system uses for connecting with it.

Advanced

Enter Yes to display a text input frame. You can use it to enter additional values other than the default HTTP header information that is sent along with the protocol header, such as SOAPAction information.

Fields

Enter Yes to display another frame that lets you enter a set of parameter codes and associated values or token names that are appended to the specified URL.

HTTP Parameters Panel

Sequence

Enter the relative sequence of this parameter. The system appends the parameters to the URL according to this sequence.

Parameter Code

Enter the literal name of a parameter to append to the specified URL when it is posted to the HTTP server.

You can associate either of two types of values with this parameter:

- A hard-coded text string in the Parameter Data field.
- A variable value in the Token field. The system extracts the value associated with the token from the file and adds it to the URL as the value of this parameter.

For example, if Parameter Code is xxx and Parameter Data is yyy, the system adds xxx=yyy to the URL.

Parameter Data

Enter a literal text string to be associated with this parameter when it is appended to the specified URL.

If you enter a value in Token, leave this field blank.

Token

Enter a token to be associated with this parameter when it is appended to the specified URL. The system extracts the value associated with this token from the file and adds it to the URL as the value of this parameter.

If you enter a text string in Parameter Data, leave this field blank.

Data Validation Maintenance

Validation only takes place when the specified implementation definition has Validate set to Yes.

Define the required value down to the field level. If the data cannot be validated against the specified value during transformation, the system generates an error.

You can set up more than one data validation for same document, record, and field. The system then performs validation against each of the specified values. If the field's value does not match one of the values specified, the system generates an error.

Because validation records are implementation-specific, you can define different validations for different trading partners.

Main

Direction

Enter the direction of the documents that have the field value validated. Documents imported into your system are inbound, while documents exported to the EC subsystem are outbound.

Document Name and Version

Enter the name and version of the document definition that contains the validated field.

Implementation Name and Version

Enter the name and version of the implementation associated with the validate document.

Record Seq

Enter the sequence number of the record containing the validated field.

Field Seq

Enter the sequence number of the field containing the validated value.

Field Code Value

Enter the value against which the field is validated.

Field Code Desc

The system displays the description from the field definition.

Use **Data Validation Browse (35.13.22)** or **Data Validation Report (35.13.23)** to view existing data codes.

Session

Use the report to analyze where problems occurred, then resolve the problems either at the source—for example, by adding missing data with the appropriate maintenance program—or in the data repository. When the problems are corrected, either start the import or export again or use one of the reprocessing programs.

For more information, see Import Reprocessing and Export Reprocessing.

Main

Inbound

Enter the direction of the document transfers to be included in this report. Documents imported into your system are inbound, while documents exported to the EC subsystem are outbound.

Status

Specify the status of documents to include in the output report of this program.

- Failed (the default): The report is limited to documents that failed to process.
- Passed: The report is limited to documents that processed correctly.
- Both: The report includes all documents regardless of status.

Summary Only

Set this field to Yes to limit the report to the summary section, which includes a trading-partner-level summary of which documents were processed, how many passed, and how many failed. The Load, Transformation, and Gateway Process sections do not display.

Summary Details

Set this field to Yes to have each section of the report include additional processing details. Details include status information for each sequence number created, as well as cross-references between exchange file and application document reference IDs and sequences.

Pre-Select All

Enter Yes to have all sessions selected—that is, marked with an asterisk (*)—when displayed in the selection list. When this field is No, the sessions still display, but none are initially selected.

When the list displays, you can select or deselect sessions as needed.

Print Details

Enter Yes to include error messages on the report. If you enter No, the report includes only the status code for each document processed during the session.

Date

Enter an optional date range to limit the selection to session numbers processed between those dates.

Session

Enter the session numbers of the process sessions to include in this report. Separate multiple entries with commas. Choose Go to display a list of sessions showing the date and time they were started. Selected sessions are marked with an asterisk (*). You can deselect sessions as needed.

Note If you enter both a date range and one or more session numbers, the report includes the specified sessions only if they fall within the date range. If none of the sessions match the date range, the system displays the message No files to process.

Selection Process Session Numbers

After selecting sessions from the list, Choose Run. Selected sessions display in the Session field. Then, select an output for the report or specify a batch ID.

The system assigns a status code to each document at each step of the process. Status codes are listed in the following table:

Code	Direction	Status
11	Inbound	Load process failed. Could indicate problem in SNF file or with trading partner or document definition.
12	Inbound	Exchange file load successful.
13	Inbound	Exchange file transformation errors.
14	Inbound	Exchange file transformation successful.
21	Inbound	Application document created, but has not moved to transfer process. Can indicate

Code	Direction	Status
		a problem with gateway processing.
22	Inbound	Application document transfer errors.
23	Inbound	Application document transfer successful.
31	Outbound	Application document transfer errors. Correct in application, then treat as new export.
32	Outbound	Application document transfer successful.
33	Outbound	Application document transformation errors.
34	Outbound	Application document transformation successful.
41	Outbound	Exchange file created, but has not moved to unload process. Can indicate a problem with gateway processing.
42	Outbound	Exchange file unload errors.
43	Outbound	Exchange file unload successful.

The status of the document tells you where in the process any errors occurred. You can then use one of the document repository inquiry or report programs to display the error messages and identify the causes of specific problems:

- **Exchange Document Status** report
- **Application Document Status** report

Application Definitions

Note You can use this program to create new document definitions or to modify any definitions you have created yourself. However, you cannot modify the QAD-developed document definitions that were provided with eCommerce. Instead, copy an existing definition using the Copy action and then modify the copy.

Create a different definition for each type of document. Use the Main panel to identify a definition by a unique combination of name, version, and direction. You also specify the gateway programs used to transfer the data and to produce reports during processing.

Note It is also possible to create an implementation definition based on an existing document definition, as well as an external .xml or .xsd file, or on Progress source code that defines a temporary table.

Main

Name

Specify a name for the document definition.

Note You cannot modify the QAD-developed template document definitions that were provided with eCommerce.

Inbound

Select this field to define the direction of the file transfer as inbound. Always specify the direction relative to your system—documents imported into your system are inbound, while documents exported from your system are outbound.

Gateway Program

Enter the name of the Progress gateway program used to transfer this document. If this definition is based on a QAD-developed definition, the value defaults. If you are creating your own, enter the name of a custom-developed Progress program.

DS Program

Optionally, enter the name of the Progress program that is run persistently and contains the dataset definition and methods.

Version

Enter a version number. You can use the same name for more than one document definition, then use a different version number to differentiate among multiple document definitions with the same name.

Additionally, you can specify the direction of the file transfer using the Inbound field to distinguish between multiple documents with the same name.

QAD

This field is selected if this is a QAD-developed document definition.

Gateway Report Program

Enter the name of the Progress program used to generate reports related to document transfers.

Gateway Process Priority

Enter the process priority value (0-99999) to set the gateway processing priority for this document. The default is 0, which is the lowest (normal) processing priority.

This value controls the sequence in which different document types are processed at the gateway level. For example, eCommerce Manager in **EDI Processing** uses the priority to determine the sequence in which the business unit processes multiple EMT documents.

Procedure

If you enter a value in DS Program, enter the name of the procedure or method that is run to process the dataset.

Application File Records

To add a record, click New.

Sequence

Specify the sequence number of this record. The system automatically assigns the next number, but you can change it to any number. Organize the records in a logical numerical hierarchy.

Important In all cases, the first record created must be sequence number 1. For example, you cannot use a sequence of 10, 20, 30, 40. Instead, use 1, 10, 20, 30, 40.

Record Name

Enter a name for this record. Each record name must be unique in an application document definition. Record names in application document definitions and implementation definitions must follow a set of naming conventions.

This record name is used as a record variable by the transformation process, independent of the sequence number.

Requirement

Select this checkbox to indicate that this record is required during the transfer process. If the system cannot find mandatory records while transferring records, it generates an error message and does not process the associated document.

Loop Occur

Enter the number of times the processing logic loops through the records during transformation.

Loop End Sequence

Enter a defined record sequence number to indicate where the loop ends. For example, enter a value of 2 on sequence number 2 to indicate that the entire loop sequence takes place on a single record.

Or, enter an end sequence of 4 on sequence number 3 to indicate a loop that starts at 3 and ends at 4.

To specify a loop structure that includes all records, enter zero or a number higher than the last record sequence defined.

Generic

Select this field if this record is for generic mapping of one or more database tables within the application. The Table field is then enabled so you can enter table names.

Table

Enter the schema names of the tables this record applies to. Separate multiple table names with commas. You cannot leave this field blank when the Generic field is selected. The system validates your entries. If the tables do not exist, the system displays a warning.

Fields

Enter Yes to access an additional panel that lets you display, enter, or edit the fields contained in this record.

If Fields is No, you cannot access the fields for a record.

Add Child

Select the Add Child button in this panel to add more information for the selected record.

Field Sequence

Specify the sequence number of this field in the record. The system automatically assigns the next available number. You can modify the number as needed or navigate to the blank fields at the bottom of the panel and assign numbers.

Note It is recommended that you number the fields sequentially, beginning with 1—making available a total of 100 fields for each record. Although the system accepts non-sequential numbers, their use is not recommended.

Field Name

Enter the name of the field. This name must be unique in the record.

Requirement

Select this field to indicate that it is required during the load process. If the system cannot locate mandatory fields, it generates an error message and does not process the associated record.

Type

Enter the type of data that is included in this field. Valid entries are:

- AN (Alphanumeric)
- D (Date)

- I (Integer)
- L (Logical)
- R (Real number)

Minimum

Enter the minimum number of characters required in this field. The system validates that required or optional data is greater than or equal to the minimum required value for the field.

Maximum

Enter the maximum number of characters allowed in this field.

- If the field lengths are variable and separated by the delimiter specified in **EC Subsystem Definitions**, the system validates that the field length is between the minimum and maximum values.
- If the field lengths are fixed, the system uses this value to calculate where each field starts and ends.

Gateway Variable

Enter the name of the gateway variable associated with this field. These variables determine the specific way data is transformed. If this document definition was copied from a QAD-provided template, the gateway variable is copied from that file. If not, the variable must be defined in the program specified in the Gateway Program field.

Default

Optionally enter a default value for this field.

Application Definitions

Document Name

Specify a range of document names to use for the report.

Version

Specify a range of document versions to use for the report.

Inbound

Select Yes to specify the direction of the records as inbound

Select No to specify the direction of the records as outbound.

Select Run to process the report.

Application Definition Copy

Use **Application Definitions** to modify the copy as needed. For more information, see Application Definitions on page 6904.

Source Application File

Specify the source application file you want to copy.

Source File Version

Specify the source file version you want to copy.

Source File Inbound

Select this field to specify that the source file is inbound.

Destination Application File

Specify a unique file name to identify the new application definition.

Destination File Version

Specify a file version to identify the new application definition.

Destination File Inbound

Select this field to specify that the new application file is inbound.

Note The direction does not have to be the same for the source and destination file. For example, you can base an outbound definition copy on an inbound source definition.

Trading Partner Document Delete

Filter

Trading Partner ID

Specify the trading partner ID that you want to delete records for.

Trading Partner Document ID

Specify the trading partner document ID that you want to delete records for.

Inbound

Select Yes to include only inbound documents.

Select No to include only outbound documents.

Delete

Select Yes to delete the specified documents.

This field is set to No by default.

When you click Run, the system deletes the following records:

- The trading partner document.
- The corresponding record in **Trading Partner Parameters**, if the site/address combination is not used elsewhere in EDI eCommerce.
- The transformation, implementation, exchange, and application document definitions, if they are not used for other documents in the system.
- The **Trading Partners** record, if all the documents have been deleted from it.

Manual Acknowledgement Resolution

This program only processes changes with Pending, Rejected or Accepted status codes. When you change the status of a change record from Pending to Accepted, it is deleted from the system. However, if you inadvertently change the status to Rejected, you can run the program again and change it to Accepted.

Main

Update Status for All

Select this checkbox to update the status of all selected orders.

Status

Select the status from the dropdown menu:

- Accepted
- Pending
- Rejected

eCommerce Functions

Define the type of return required—alphanumeric, integer, real number, date, or logical—as well as the names and types of the parameters that the function passes. The program uses your input to create a Progress program template. After saving the template to disk, use a text editor to open the file and complete the code.

The system saves user-defined functions in the directory specified in **eCommerce Control** with the file name Function Name.

Main

Function Name

Enter a unique alphanumeric name for this function. Do not use the name of any existing QAD-provided or user-defined function.

Important The file name is based on the function name you specify. Use function names that follow the naming conventions of your operating system.

Return Type

Enter the type of value returned as output when this function is performed. Valid settings are:

- AN: Alphanumeric
- R: Real number
- I: Integer
- L: Logical
- D: Date

Description

Optionally describe what this function does.

Process Function to Disk

Select this checkbox to enable function to disk.

Parameter Update

For an existing eCommerce Function, based on the function name selected on the Main panel, this section displays the list of parameters.

Note This section remains disabled for QAD defined functions.

When creating a new eCommerce Function, this section gets enabled. It is possible to define up to 10 parameters for a new function.

eCommerce Functions Copy

Then, use **eCommerce Functions** to modify the copy as needed. The new definition is created in the function directory specified in **eCommerce Control**.

Use this method to streamline creation of similar definitions.

Note You cannot delete QAD-supplied functions.

Main

Destination Function

Enter a name for the new function. The system saves the new file in the function directory specified in **eCommerce Control**.

Note The file name is based on the function name you specify. Use function names that follow the naming conventions of your operating system.

Destination Function Description

Optionally enter a description for the new function.

After saving the copied function the Parameter Update panel displays with the parameters of the copied function. It is possible to define up to 10 parameters for a new function.

Using eCommerce with Multiple Domains

You can use a single instance of eCommerce to import and export documents between multiple domains and the EC subsystem.

This section describes how the system processes EDI transactions and how you set up multiple domain features.

Multiple-Domain Processing

The primary factor the system uses in determining how to process EDI transactions in a multiple-domain environment is the eCommerce processing domain—the domain in which repository records and business documents are stored. This domain is one of the following:

- By default, the login domain of the EDI eCommerce user—either at initial login or modified by changing the domain during a processing session
- The processing domain specified after login using **Change Current eCommerce Domain**
- The domain associated with the user's login domain in Domain Cross References on page 6915.

In some cases, all EDI eCommerce processing and document creation happens within a single domain. For example, the user who imports a purchase order is logged in to the same domain where the resulting sales order is created. System-generated repository records are in the user's domain. Error-reporting and repository maintenance functions have direct access to the records that the transformation and gateway processes use to create the sales order.

In a different scenario, the user might not create records in the login domain, based on one of the following factors:

- A record created in **Domain Cross-Ref Maintenance** associates the user's login domain and a second domain used for eCommerce processing.
- A domain identifier in the transformation definition sets the value of the DOMAIN token during transformation. In this case, a token variable set to this value causes the system to create the document in the EDI eCommerce processing domain. However, the transaction data is created in a different domain.

In either of these cases, the system can load repository data and create the business document—the sales order, for example—in a different domain than where the user is logged in.

Note If any user transformation functions were defined before the release of multiple-domain functionality, update them to reference an additional Progress include file and a domain-associated variable used during transformation.

During export, the system similarly uses either the user's session login domain or a cross-reference record to determine the eCommerce processing domain that provides domain-specific data—such as trading partner information—for outbound documents. It uses the DOMAIN variable for reference to determine the correct source domain for exported data, including any turnaround data.

Turnaround data is stored based on the eCommerce processing domain used when the source document is imported. When you update turnaround data using **Turnaround Data Maintenance**, use the Target Domain field to specify the domain associated with the turnaround data you want to maintain. You can also specify the target domain when you archive and delete turnaround data using **Turnaround Data Archive/ Delete**.

Note When you use a single-domain database, the domain is transparent to the EDI eCommerce setup and processing functions. No special setup or implementation steps are needed, except for updating existing user-defined functions that access the database to let them handle system-required domain values.

Multiple-Domain Setup

All the domains in a database share most data-intensive records—including the exchange file, application document, implementation, and transformation definitions. However, to use the product in a multiple-domain environment, you must set up several kinds of data in each domain. These types of data are records that typically vary between domains, such as trading partner records and control settings.

Note Each domain has its own **eCommerce Control** record. This way, you can set up different inbound directories so that the location where the system looks for imported files can vary by login domain.

To enter domain-specific setup data, either log in to the target domain at sign-on, switch to the appropriate domain, or use **Change Current eCommerce Domain**. The system automatically assigns the records you create to the appropriate eCommerce processing domain.

Program	Comments
Turnaround Data Maintenance	
EC Subsystem Exchanges	
EC Subsystem Applications	
Trading Partner Maintenance	
Trading Partner Parameters	
Data Cross-References	Optional functionality
Data Validation Maintenance	Optional functionality

eCommerce Control	

When you load new data from trading partner library files rather than entering it manually using one of the listed programs, the system automatically separates domain-specific information. It loads this data into the EDI eCommerce domain you specify during the load process.

Specifying Domain Cross-References

By default, EDI eCommerce processing is based on the domain of the logged-in user session. The system uses domain-specific setup records, looks for data associated with that domain, and generates repository records using that domain as a key field. However, in some EDI environments, not all of those elements are in the login domain. For example, a centralized EDI processing area that supports several domains can load data for each domain individually, but can maintain the EDI data within a central domain.

Use **Domain Cross-References** to set up a cross-reference record between the user's login domain and a domain used in EDI eCommerce processing.

The system uses a cross-reference record under either of the following circumstances:

- The user's login domain is the same as the specified value.
- The user changes to this domain.

Changing the Target Domain During Transformation

By default, during document import the system creates application repository documents and the resulting business documents—such as sales orders—in the eCommerce processing domain. It is also possible to have the system map the document to a different domain by assigning a target domain during transformation.

Use **Transformation Definition Maintenance** to specify an event action that determines the domain associated with the document.

Loading Trading Partner Library Records

Although all domains share most elements added by **Trading Partner Library Load**, several kinds of data are domain-specific.

Use the Target Domain field to specify which domain the domain-specific parts of the new setup data are associated with. The field defaults from the user's login domain. You can change it to any valid domain defined in **Domains**.

Updating Legacy User-Defined Functions

EDI eCommerce assigns a shared variable to user-defined transformation functions when you generate them using **eCommerce Function Maintenance**. This variable, trgt_domain, lets functions identify the

correct domain associated with the data that the function accesses or processes. For example, it is used to set the target domain to the value of the DOMAIN token.

If you have legacy functions designed in an earlier, non-domain version of the product, update the code for any existing functions that access the database. The functions can then continue to support transformation with no risk of degrading processing performance. Additionally, the functions should have a reference to the Progress include file mgdomain.i.

To update user-defined functions, use a text editor to add the following code to the beginning of each Progress function program:

{mgdomain.i}

define shared variable trgt_domain like global_domain no-undo.

User-defined functions are stored in the directory specified in the Function Directory field in **eCommerce Control**.

Domain Cross References

The system uses a cross-reference record under either of the following circumstances:

- The user's login domain is the same as the specified value
- The user changes to this domain

By default, EDI eCommerce processing is based on the domain of the logged-in user session. The system uses domain-specific setup records, looks for data associated with that domain, and generates repository records using that domain as a key field. However, in some EDI environments, not all of those elements are in the login domain. For example, a centralized EDI processing area that supports several domains can load data for each domain individually, but can maintain the EDI data within a central domain.

Note No cross-reference records are needed in a single-domain environment.

Main

Application Domain

Specify the application domain that you want to use for this cross-reference. You can enter a maximum of 8 characters.

Note This is a mandatory field.

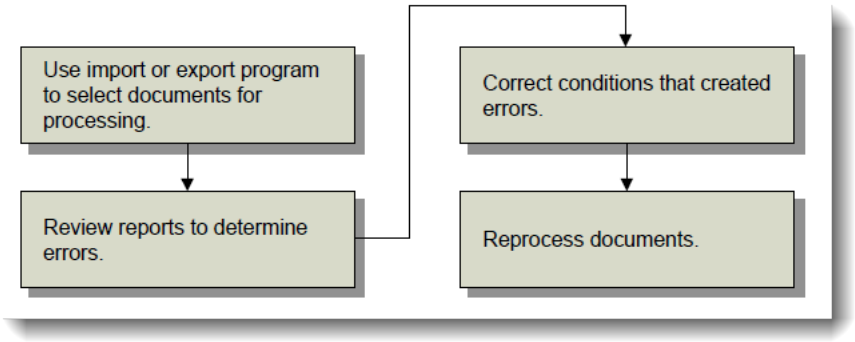
eCommerce Domain

Specify the eCommerce domain that you want to use for this cross-reference. This value can be auto populated if associated with Application Domain.

Introduction to eCommerce Use

The system does most of the processing automatically based on the way trading partner documents, exchange files, and transformation maps are set up. Day-to-day users of eCommerce generally use only a few programs to import and export files. The following image shows a typical task flow:

eCommerce User Task Flow



EDI eCommerce's process control logic can be started in one of three ways:

- A system user can begin processing by selecting documents using either **Document Import (35.1)** or one of the programs in **Document Export**.
- The system can search at regular intervals for inbound files from an EC subsystem or outbound documents in the database. When it finds new files or documents, the system automatically begins processing.
- You can write a custom program that lets the EC subsystem invoke eCommerce processing whenever it has files to send to your system.

This chapter assumes that processing begins when the operator selects documents using one of the menu programs.

In addition to import and export programs, eCommerce provides several tools for viewing and modifying data in the data repository. Items in the data repository include documents in various stages of transition between the EC subsystem and your system. Routinely using these programs to change data is not recommended. However, they can be valuable for modifying such things as erroneous control records that prevent the system from processing a file.

To regain disk space, you can archive and delete data when it is no longer needed. For example, you can delete exchange file and application documents that have already completed processing, transformation, and loading to the EC subsystem or the database. Other programs let you archive and delete turnaround data records and comments linked to imported orders.

For more information, see Maintaining the Document Repository on page 6947.

Note The gateway programs used to import and export documents check for blocked customer/supplier transactions defined for the corresponding menu program. For example, you can use **Document Import** to import a customer's purchase order, which creates a sales order during gateway processing. However, if the customer address is blocked from creating transactions in **Sales Order Maintenance**, EDI eCommerce issues error messages during import and does not create a sales order from the imported document.

Using eCommerce with EMT

EDI eCommerce supports Enterprise Material Transfer (EMT), which lets you automatically generate purchase orders from sales orders. You can use eCommerce to exchange EMT purchase orders, PO change and acknowledgment documents, and shipping documents with your trading partners up and down the supply chain.

Several eCommerce programs are designed specifically for use with EMT:

- **eCommerce Manager**
- **PO Change Ack Export**
- **PO Change Export**

Using eCommerce with Trade Sales

Under trade sales agreements, trade sales suppliers do not communicate directly with the customer. A sales agreement exists between you and your customer that you create orders, transact, and document the material delivery from a trade sales supplier to the customer. However, the trade sales supplier delivers the actual material to the customer. You transact the order and shipment and inventory is temporarily added and issued; however, no trade sales supplier materials are ever physically added to your inventory or consumed.

When you create customer trade sales orders in **Customer Scheduled Orders**, the system automatically:

- Creates supplier scheduled orders.
- Creates supplier planning or shipping schedules when you import active trade sales customer planning or shipping schedules.
- Creates the following shipment documents when you import an ASN for a trade sales supplier scheduled order: PO shipper, PO shipper receipt, SO shipper, SO shipper confirmation, and optional ASN sent to the customer.

Fields in EDI eCommerce work with parameter settings in **Trading Partner Parameters** to automate trade sales processing. You can set up EDI eCommerce to manage two ASN processes:

- Trade sales suppliers send you an original ASN.
- Trade sales suppliers send you a copy of the ASN.

If the trade sales supplier sends you the original ASN, you send your own ASN to the customer. The system automatically creates your ASN from the SO shipper. If the trade sales supplier sends you a copy, you typically do not send your own ASN to the customer as this duplicates data the customer receives and can lead to confusion.

The system creates an SO Shipper automatically from the ASN data that the trade sales supplier sends to you, so no additional ASN setup is required to create the SO shipper.

Set the following to send ASNs to the customer automatically:

- Export ASN to Yes in **eCommerce Manager**.
- Queue Trade Sales ASN to Yes in **Trading Partner Parameters** for the supplier.

Set the following to automatically send system-created supplier planning or shipping schedules to trade sales suppliers:

- Export Supplier Schedules to Yes in **eCommerce Manager**
- Queue TS Schedules to Yes in **Trading Partner Parameters** for the supplier

- Send EDI Plan Schedule or Send EDI Ship Schedule to Yes in **Trading Partner Parameters** for the supplier

The system adds exported schedules to the eCommerce Session Report.