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Getting Started

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

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

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

Audience

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

Essential Information

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

Registration

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

If you need software, see:
“Free Connectivity and Document Exchange Software” on page 16

“Translation Software—Managed Services” on page 16

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

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

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

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

Inovisworks Conventions
Conventions used throughout Inovisworks:

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

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Required fields</td>
<td>Indicated by an asterisk (*).</td>
</tr>
<tr>
<td>Online Help</td>
<td>To the right of the tabs and always available.</td>
</tr>
<tr>
<td></td>
<td>- Click Help to view online help.</td>
</tr>
<tr>
<td></td>
<td>- Click FAQ Help in the left pane of a tab to view frequently asked questions (FAQs) about the functions available from the tab.</td>
</tr>
<tr>
<td>Log Off</td>
<td>To the right of the tabs, click Log Off to return to the Inovisworks Login page.</td>
</tr>
</tbody>
</table>
**Using the Calendar Icon**

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

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

**Login Information**

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

1 On the Inovisworks Login page, type your Login ID and Password.

![Login page](image)

**Note:** Login IDs and passwords are case sensitive.

2 Click Login.

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

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

Resetting a Forgotten Password

To reset a forgotten password

1 On the Inovisworks Login page, click Forgot Password?

2 Type your Login ID and email address. Click Continue.

3 Type your answer to the password question. Click Continue.

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

4 Click Continue.

5 Go to the email message from GXS and click the link.

**Note:** For security purposes, the link is only active for 30 minutes.

6 Type your answer to the password question. Click Continue.

7 Type a new password in the New Password and Confirm New Password fields. Click Change Password.

The Inovisworks Login page opens. You can use your new password to log on.
About Inovisworks Tabs

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

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

Inovisworks Tabs

<table>
<thead>
<tr>
<th>Tab Name:</th>
<th>Use this Tab to...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Home</strong></td>
<td>View a document Transaction Summary, System Messages, the services to which you subscribe, and Add a Service. From the navigation panel you can also:</td>
</tr>
<tr>
<td></td>
<td>- Find GXS contact information.</td>
</tr>
<tr>
<td></td>
<td>- View system messages.</td>
</tr>
<tr>
<td></td>
<td>- View or edit profiles.</td>
</tr>
<tr>
<td></td>
<td>- Search for accounts or trading partners.</td>
</tr>
<tr>
<td></td>
<td>See “Using the Home Tab” on page 30.</td>
</tr>
<tr>
<td><strong>Document Tracking</strong></td>
<td>Search for and track inbound and outbound documents using a Basic, Advanced, or Quick search.</td>
</tr>
<tr>
<td></td>
<td>See “Document Tracking Tab” on page 37.</td>
</tr>
<tr>
<td><strong>Reports</strong></td>
<td>View Billing Usage, Document Summary, Trading Partner, and other reports.</td>
</tr>
<tr>
<td></td>
<td>See “Reports Tab” on page 75.</td>
</tr>
<tr>
<td><strong>Administration</strong></td>
<td>Maintain Accounts, Trading Partners, Customer, and User information.</td>
</tr>
<tr>
<td></td>
<td>See “Administration Tab” on page 101.</td>
</tr>
<tr>
<td><strong>Premium Services</strong></td>
<td>Access premium GXS services, including marketing information about new products.</td>
</tr>
<tr>
<td><strong>Support</strong></td>
<td>- Contact Support</td>
</tr>
<tr>
<td></td>
<td>- View messages</td>
</tr>
<tr>
<td></td>
<td>See “Support Tab” on page 153.</td>
</tr>
</tbody>
</table>

Roles and Functions

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

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

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

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

These roles are available:

<table>
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<th>Name of role</th>
<th>Additional information</th>
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<tr>
<td>Customer Admin</td>
<td>Individuals with the Customer Admin role assigned to their user profile can assign roles to user profiles. <strong>Important:</strong> Inovisworks automatically assigns the Customer Admin role to the login ID defined during registration. See “Example of General Role Usage—Customer Admin and Customer User Roles” on page 21.</td>
</tr>
<tr>
<td>Customer User</td>
<td></td>
</tr>
<tr>
<td>Account Admin</td>
<td>Individuals with the Account Admin or Account User role assigned to their user profile are typically responsible for managing specific third party accounts (PSNs). When logged in to Inovisworks, users with these roles cannot access the Support Tab. See “Example of Limited Role Usage—Account Admin and Account User” on page 22.</td>
</tr>
<tr>
<td>Account User</td>
<td></td>
</tr>
</tbody>
</table>

Assigning User Roles

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

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

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

<table>
<thead>
<tr>
<th>Task</th>
<th>Customer Admin</th>
<th>Account Admin</th>
<th>Customer User</th>
<th>Account User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>X</td>
<td>X *</td>
<td>X</td>
<td>X *</td>
</tr>
<tr>
<td>Document Tracking</td>
<td>X</td>
<td>X *</td>
<td></td>
<td>X *</td>
</tr>
<tr>
<td>Run reports</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>View / Add / Edit accounts</td>
<td>X</td>
<td>X *</td>
<td>X</td>
<td>X *</td>
</tr>
<tr>
<td>View acknowledgements</td>
<td>X</td>
<td>X *</td>
<td></td>
<td>X *</td>
</tr>
</tbody>
</table>
Each role has specific functions assigned. The following topics provide examples of intended use of these roles:

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

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

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

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

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

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

- A Customer Admin can access information for all accounts (PSNs) associated with a customer company ID on Inovisworks, and can create additional user profiles with a Customer Admin or Customer User role assigned.
- A Customer User can access only the account (PSNs) to which they are assigned.
In this example, Joe assigned a Customer Admin role to Judy and assigned Customer User roles to Mary, Dave and Sam. Mary was granted access to the Miami Division account (PSN). Dave and Sam were granted access to the Detroit Division account.

Example of Limited Role Usage—Account Admin and Account User

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

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

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

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

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

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

Third Party Company Customer Admin and Customer User roles have access to all accounts (PSNs) for the customer ID (company).

Users with an Account Admin or Account User role have limited access to the account (PSNs) to which they are assigned.

### Functions Based on Roles

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

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

<table>
<thead>
<tr>
<th>Function/Task</th>
<th>Customer Admin</th>
<th>Customer User</th>
<th>Account Admin</th>
<th>Account User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact GXS</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>View GXS Messages</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Search for Accounts</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Update My Profile</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>View Transaction Summary</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Document Tracking</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quick Search</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Basic Search</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Advanced Search</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>List Documents</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>
## GETTING STARTED

### Roles and Functions

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

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

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

Document Rules

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

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

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

**Acknowledgement Reconciliation**

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

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

**Archive and Restore**

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

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

**Cross-Reference Tables**

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

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

**Viewing and Printing the User Guide PDF**

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

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

**Saving a PDF to Your Hard Drive**

1. **To save a User Guide PDF to your hard drive**
   1. Click **Help** to access the online help system.
   2. If the Internet Explorer security message appears, click the message and select **Allow Blocked Content** > **click Yes**.

   ![Security Message]

   The help system opens.

   3. Select any topic and go to the bottom of the page.
4 Click View or Print a User Guide PDF.

5 To save the PDF to your hard drive, click Save a Copy.

6 Navigate to the location where you want to save the PDF > click Save.
   The Inovisworks User Guide PDF is available on your hard drive.

Viewing the Online Tutorial

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

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

   The help system opens.
3 In the left pane, click Getting Started.
4 Click Online Tutorial >
   http://training.inovis.com/Breeze/inovisworks_overview/index.htm
Home Tab

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

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

**Viewing GXS Contact Information**

To view GXS contact information:
- Click **Home tab > Contact Us**.

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

**Viewing Messages**

Messages include general announcements, alerts, and any network notices from GXS.
- To view the full text of a single message—click the message.
To view all current messages—click View All Messages, or from the navigation panel, click Messages.

<table>
<thead>
<tr>
<th>Message Types</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greeting/Informational</td>
<td>General information, such as a new online service.</td>
</tr>
<tr>
<td>Alert</td>
<td>Future downtimes and their expected time frames.</td>
</tr>
<tr>
<td>Warning</td>
<td>Production issues, such as backlogs.</td>
</tr>
<tr>
<td>Severe</td>
<td>Production down time.</td>
</tr>
</tbody>
</table>

**Updating Your Own Profile**

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

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

**To update your user profile**

1. Click Home tab > My Profile.
   
   Your user profile opens.

2. Type or select your changes.
   
   **Note:** First Name and Last Name are required.

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

<table>
<thead>
<tr>
<th>Default Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
</tr>
<tr>
<td>Document Tracking</td>
</tr>
<tr>
<td>Reports</td>
</tr>
<tr>
<td>Administration</td>
</tr>
<tr>
<td>Visibility</td>
</tr>
<tr>
<td>Support</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Default Transaction Graph View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction View</td>
</tr>
<tr>
<td>Interchange View</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>If you want the graph to show...</th>
<th>Do this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual transactions within an ISA segment</td>
<td>Select Transaction View.</td>
</tr>
<tr>
<td>Transactions at the ISA level only (does not include individual transactions within in the ISA segment)</td>
<td>Select Interchange View.</td>
</tr>
</tbody>
</table>
5 Click **Update Profile**.  
A message lets you know your profile information is edited.

6 Click **Done** and the Transaction Summary page opens.

**Using the Account Selection Area**

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

**To use the account selection area**

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

2. Click **Search**.
   
The Home Tab opens, displaying the results of your search.

**Using the Search Area**

The Search option in the navigation pane duplicates the searchable items in the Account Selection area.
If you make an error when typing your search criteria, the Search page opens.

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

<table>
<thead>
<tr>
<th>If you:</th>
<th>You see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move your cursor over a color-coded area</td>
<td>Document summary information. For example, the number of Invoices in the Available column.</td>
</tr>
</tbody>
</table>

In this example, moving the cursor over a color-coded area shows:
- 3,143 orders have a Sent status.
- Orders make up 3.14 percent of all Sent documents.

Click a colored-coded area in the graph. The Document List page opens, listing all documents represented by the selected color in the column. For example, all Available Invoices (see “Using the Document List” on page 49).
To display documents for a specific time period

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

2. Click Search.

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

Viewing the Acknowledgement Status Summary Graph

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

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

<table>
<thead>
<tr>
<th>If you...</th>
<th>You see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move your cursor over a colored area</td>
<td>Acknowledgement summary information, such as the number of transactions with an error status.</td>
</tr>
</tbody>
</table>

In this example, moving your cursor over a color-coded area shows:

- Six transactions have reached a Warning timeout status
- Transactions with a Warning timeout status make up 13.04 percent of all transactions with errors.

Click a colored-coded area in the graph.

The Document List page opens, listing all documents represented by the selected color in the column. For example, all Available Invoices (see "Using the Document List" on page 49).
To filter documents on the Ack Status Summary Graph by time period

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

2. Scroll down to see the Acknowledgement Status Summary Graph.
   The graph displays the time-specific transactions by acknowledgement status for the account.

Select to display Transaction or Interchange information on the graph.

Move your cursor over a colored area to see transaction information.
Use the Document Tracking tab to search for and monitor inbound and outbound documents. Your Trading Partner can view, resend, and in some cases, reprocess documents.

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

### Searching for Documents

Use the Document Tracking tab to find documents:

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

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

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

**To use a basic search for your documents**

1. Click the Document Tracking tab.
   
The Basic Search page opens.

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

2. Type or select all the information required for your document search. For field definitions, see “Basic Search Field Definitions” on page 39.

3. Click Basic Search.

   The Document List opens displaying your results. For more information on the Document List page, see “Using the Document List” on page 49.
Basic Search Field Definitions
These are your Basic Search field definitions.

<table>
<thead>
<tr>
<th>Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direction</td>
<td>Inbound, Outbound, or Both as your document direction.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Always make this selection first as your choice impacts the</td>
</tr>
<tr>
<td></td>
<td>remaining available fields.</td>
</tr>
<tr>
<td></td>
<td>■ Inbound document—Search all documents received by your company from a</td>
</tr>
<tr>
<td></td>
<td>Trading Partner.</td>
</tr>
<tr>
<td></td>
<td>■ Outbound document—Search all documents sent from your company to a Trading</td>
</tr>
<tr>
<td></td>
<td>Partner.</td>
</tr>
<tr>
<td></td>
<td>■ Both—Search all documents.</td>
</tr>
<tr>
<td>Status</td>
<td>From the drop-down list, the status of the documents for which you are</td>
</tr>
<tr>
<td></td>
<td>searching.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Status selections change based on whether your search is Inbound,</td>
</tr>
<tr>
<td></td>
<td>Outbound, or Both.</td>
</tr>
<tr>
<td></td>
<td>For document status information, see “Document Status” on page 50.</td>
</tr>
<tr>
<td>Level</td>
<td><strong>Interchange</strong>—Provides search information at the document level.</td>
</tr>
<tr>
<td></td>
<td>■ Transaction (EDI documents only)—If there are multiple transactions within</td>
</tr>
<tr>
<td></td>
<td>the same document, additional document type and transaction set information is</td>
</tr>
<tr>
<td></td>
<td>provided.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The number of records retrieved is different for each level. For</td>
</tr>
<tr>
<td></td>
<td>example, for documents with three transaction sets, viewing the Transaction</td>
</tr>
<tr>
<td></td>
<td>level you see three records; viewing the Interchange level you see one record.</td>
</tr>
<tr>
<td></td>
<td>■ Session—Returns a list of FTP or pipeline sessions.</td>
</tr>
<tr>
<td></td>
<td>■ File—Provides information about FTP files that were sent asynchronously.</td>
</tr>
<tr>
<td>Interchange Ack Status</td>
<td>Depends on the level selected (Interchange or Transaction). Status of the</td>
</tr>
<tr>
<td>OR</td>
<td>functional acknowledgement.</td>
</tr>
<tr>
<td>Transaction Ack Status</td>
<td><strong>Note:</strong> Displays only if your company subscribes to the Functional</td>
</tr>
<tr>
<td></td>
<td>Acknowledgement (FA) reconciliation service.</td>
</tr>
<tr>
<td>Start Date/End Date</td>
<td>From the calendar icons, the dates to start and end the search. (mm/dd/yyyy</td>
</tr>
<tr>
<td></td>
<td>format)</td>
</tr>
<tr>
<td>Start Time/End Time</td>
<td>From the drop-down lists, the time to start and end the search. The time</td>
</tr>
<tr>
<td></td>
<td>selection is in 15 minute intervals,</td>
</tr>
<tr>
<td>Trading Name</td>
<td>Name of the account (PSN) on which you want to search.</td>
</tr>
<tr>
<td>My Trading ID</td>
<td>From the drop-down list, your trading ID.</td>
</tr>
<tr>
<td>Partner Trading ID</td>
<td>From the drop-down list, your Trading Partner’s ID.</td>
</tr>
<tr>
<td>Partner Qualifier or</td>
<td>From the drop-down list, your Trading Partner’s qualifier</td>
</tr>
<tr>
<td>Free Format</td>
<td>If your partner’s qualifier is not listed, type the entry.</td>
</tr>
</tbody>
</table>

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

**Note:** You can search for up to 35 days of current documents.
To perform an advanced search for documents

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

2. In the Advanced Search fields, type or select all information for your advanced document search.
   For field definitions, see “Advanced Search Field Definitions” on page 41.

3. Click **Advanced Search**.
   The Document List page displays your Advanced Search results.
   For more information on the Document List page, see “Using the Document List” on page 49.
Advanced Search Field Definitions
These are your Advanced Search field definitions.

<table>
<thead>
<tr>
<th>Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direction</td>
<td>Inbound, Outbound, or Both as your document direction.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Always make this selection first as your choice impacts the</td>
</tr>
<tr>
<td></td>
<td>remaining available fields.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Inbound document</strong>—Search documents received by your company</td>
</tr>
<tr>
<td></td>
<td>from a Trading Partner.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Outbound document</strong>—Search documents sent from your company</td>
</tr>
<tr>
<td></td>
<td>to a Trading Partner.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Both</strong>—Search Inbound and Outbound documents.</td>
</tr>
<tr>
<td>Status</td>
<td>From the drop-down list, the status of the documents for which you are</td>
</tr>
<tr>
<td></td>
<td>searching.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Status selections change based on whether your search is Inbound,</td>
</tr>
<tr>
<td></td>
<td>Outbound, or Both.</td>
</tr>
<tr>
<td></td>
<td>For document status information, see “Document Status” on page 50.</td>
</tr>
<tr>
<td>Level</td>
<td><strong>Interchange</strong>—Provides search information at the document level.</td>
</tr>
<tr>
<td></td>
<td><strong>Transaction</strong> (EDI documents only)—For multiple transactions</td>
</tr>
<tr>
<td></td>
<td>within the same document, additional document type and transaction set</td>
</tr>
<tr>
<td></td>
<td>information is provided.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The number of records retrieved is based on the level searched.</td>
</tr>
<tr>
<td></td>
<td>For example, for a document with three transaction sets, viewing the</td>
</tr>
<tr>
<td></td>
<td>Transaction level you see three records; viewing the Interchange level you</td>
</tr>
<tr>
<td></td>
<td>see one record.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Session</strong>—Returns a list of FTP or pipeline sessions.</td>
</tr>
<tr>
<td></td>
<td>- <strong>File</strong>—Provides information about FTP files that were sent</td>
</tr>
<tr>
<td></td>
<td>asynchronously.</td>
</tr>
<tr>
<td>Interchange Ack Status</td>
<td>Depends on the level selected (Interchange or Transaction). Status of the</td>
</tr>
<tr>
<td>OR</td>
<td>functional acknowledgement.</td>
</tr>
<tr>
<td>Transaction Ack Status</td>
<td><strong>Note:</strong> Displays only if your company subscribes to the FA reconciliation</td>
</tr>
<tr>
<td></td>
<td>service.</td>
</tr>
<tr>
<td>Start Date/End Date</td>
<td>From the calendar icons, the dates to start and end the search. (mm/dd/yyyy</td>
</tr>
<tr>
<td></td>
<td>format)</td>
</tr>
<tr>
<td>Start Time/End Time</td>
<td>From the drop-down lists, the time to start and end the search. The time</td>
</tr>
<tr>
<td></td>
<td>selection is in 15 minute intervals,</td>
</tr>
<tr>
<td>Trading Name</td>
<td>Name of the account (PSN) on which you want to search.</td>
</tr>
<tr>
<td>My Trading ID</td>
<td>From the drop-down list, your Account trading ID.</td>
</tr>
<tr>
<td>Partner Trading ID</td>
<td>From the drop-down list, your Trading Partner’s ID.</td>
</tr>
<tr>
<td>Partner Qualifier or Free</td>
<td>From the drop-down list, your Trading Partner’s qualifier</td>
</tr>
<tr>
<td>Format</td>
<td>If your partner’s qualifier is not listed, type the entry.</td>
</tr>
<tr>
<td>Filename</td>
<td>Name of a file, which can be the exact filename or part of a filename. For</td>
</tr>
<tr>
<td></td>
<td>example, *.txt</td>
</tr>
<tr>
<td>Inbound or Outbound Gateway</td>
<td>From the drop-down list, the Inbound or Outbound gateway through</td>
</tr>
<tr>
<td></td>
<td>which the document is being routed.</td>
</tr>
</tbody>
</table>
Searching for Documents

Using the Quick Search

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

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

**To quick search for a document**

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

The Document List page opens displaying your search results. For more information on the Document List page, see “Using the Document List” on page 49.
### Extracted Elements for Application Assigned Numbers

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

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Extracted Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANSI X12</td>
<td></td>
</tr>
<tr>
<td>204</td>
<td>B204</td>
</tr>
<tr>
<td>210</td>
<td>B302</td>
</tr>
<tr>
<td>214</td>
<td>B1002</td>
</tr>
<tr>
<td>220</td>
<td>LI101</td>
</tr>
<tr>
<td>504</td>
<td>BGN02</td>
</tr>
<tr>
<td>810</td>
<td>BIG02</td>
</tr>
<tr>
<td></td>
<td>BIG04 (for purchase order search only)</td>
</tr>
<tr>
<td>811</td>
<td>BIG02</td>
</tr>
<tr>
<td>812</td>
<td>BCD02</td>
</tr>
<tr>
<td></td>
<td>BCD07</td>
</tr>
<tr>
<td>820</td>
<td>BPR07</td>
</tr>
<tr>
<td></td>
<td>TRN02</td>
</tr>
<tr>
<td>823</td>
<td>DEP01</td>
</tr>
<tr>
<td></td>
<td>DEP06</td>
</tr>
<tr>
<td>824</td>
<td>BGN02</td>
</tr>
<tr>
<td></td>
<td>OTI03</td>
</tr>
<tr>
<td>830</td>
<td>BFR02</td>
</tr>
<tr>
<td>840</td>
<td>BQT02</td>
</tr>
<tr>
<td>843</td>
<td>BQR02</td>
</tr>
<tr>
<td>846</td>
<td>BIA03</td>
</tr>
<tr>
<td>850</td>
<td>BEG03</td>
</tr>
<tr>
<td>852</td>
<td>XQ04</td>
</tr>
<tr>
<td>855</td>
<td>BAK03</td>
</tr>
<tr>
<td>856</td>
<td>BSN02</td>
</tr>
<tr>
<td></td>
<td>PRF01 (for purchase order search only)</td>
</tr>
<tr>
<td>860</td>
<td>BCH03</td>
</tr>
<tr>
<td>861</td>
<td>BRA01</td>
</tr>
<tr>
<td>862</td>
<td>BSS02</td>
</tr>
<tr>
<td>867</td>
<td>BPT02</td>
</tr>
<tr>
<td>870</td>
<td>BSR03</td>
</tr>
<tr>
<td></td>
<td>PRF01 (for purchase order search only)</td>
</tr>
<tr>
<td>875</td>
<td>G5003</td>
</tr>
<tr>
<td>876</td>
<td>G9203</td>
</tr>
<tr>
<td>880</td>
<td>G0102</td>
</tr>
<tr>
<td></td>
<td>G0105</td>
</tr>
<tr>
<td>940</td>
<td>WV0502</td>
</tr>
<tr>
<td>943</td>
<td>WV0606</td>
</tr>
<tr>
<td></td>
<td>WV0602</td>
</tr>
</tbody>
</table>
DOCUMENT TRACKING TAB

Searching for Documents

To find the cause of document errors

1. Click the Document Tracking tab.

   The Basic Search page opens.

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

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

3. From the Status list, select All Errors.

4. Type all needed information.

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

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

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Extracted Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>944</td>
<td>W1703</td>
</tr>
<tr>
<td></td>
<td>W1704</td>
</tr>
<tr>
<td>945</td>
<td>W0602</td>
</tr>
<tr>
<td></td>
<td>W0604</td>
</tr>
<tr>
<td>990</td>
<td>B102</td>
</tr>
</tbody>
</table>

**EDIFACT**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>BANSTA</td>
<td>BGM02</td>
</tr>
<tr>
<td>DELFOR</td>
<td>BGM02</td>
</tr>
<tr>
<td>DELJIT</td>
<td>BGM02</td>
</tr>
<tr>
<td>DESADV</td>
<td>BGM02</td>
</tr>
<tr>
<td>HANMOV</td>
<td>BGM02</td>
</tr>
<tr>
<td>INSDES</td>
<td>BGM02</td>
</tr>
<tr>
<td>INVOIC</td>
<td>BGM02</td>
</tr>
<tr>
<td>INVRPT</td>
<td>BGM02</td>
</tr>
<tr>
<td>ORDCHG</td>
<td>BGM02</td>
</tr>
<tr>
<td>ORDERS</td>
<td>BGM02</td>
</tr>
<tr>
<td>ORDERSP</td>
<td>BGM02</td>
</tr>
<tr>
<td>PRICAT</td>
<td>BGM02</td>
</tr>
<tr>
<td>RECADV</td>
<td>BGM02</td>
</tr>
<tr>
<td>SLSRPT</td>
<td>BGM02</td>
</tr>
<tr>
<td>SSDCLM</td>
<td>BGM02</td>
</tr>
<tr>
<td>SSDRSP</td>
<td>BGM02</td>
</tr>
</tbody>
</table>

**TRADACOMS**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>CREDIT</td>
<td>CRF01</td>
</tr>
<tr>
<td>DELIVR</td>
<td>DEL01</td>
</tr>
<tr>
<td>INVOIC</td>
<td>IRF01</td>
</tr>
<tr>
<td>ORDERS</td>
<td>ORD01</td>
</tr>
<tr>
<td>CORDER</td>
<td>ORD01</td>
</tr>
</tbody>
</table>
also shown. For more information about the Document List page, see “Using the Document List” on page 49.

5 Click the Document ID of the document you need.

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

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

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

**To find hard-to-find documents**

1. Click the Document Tracking tab.
   The Basic Search page opens.
2. In the lower right, click Advanced.
3. Type all needed information.
4. In Document Type, select the Free Text Format option.
5. Type the number or letters that represent the document type that you want to find, such as 812.
6. Click Advanced Search.
   The Document List page lists all documents of the specific type.

Searching for Documents by Session

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

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

**To view documents in a session**

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

<table>
<thead>
<tr>
<th>If you are performing a...</th>
<th>Do this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Search</td>
<td>■ Type the <strong>Session ID</strong>.</td>
</tr>
<tr>
<td></td>
<td><img src="image1" alt="Quick Search" /></td>
</tr>
<tr>
<td>Basic Search</td>
<td>■ From the Level drop-down list, select <strong>Session</strong>.</td>
</tr>
<tr>
<td></td>
<td><img src="image2" alt="Basic Search" /></td>
</tr>
</tbody>
</table>

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

The Document List page displays the results of your search.

5 Click the Session ID.

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

**Searching for Asynchronous Files**

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

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

**To find asynchronous files**

1 Click the **Document Tracking** tab.

2 Select **File** from the Level drop-down list.
The File Search page opens.

3 Type or select the search criteria.

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

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

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

**Using the Document List**

The Document List page opens from either:

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

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

**Your Search Criteria**

Summary information.

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

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

**Click to modify your search options.**

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

```
Documents are sorted by clicking a column heading. An arrow next to a column heading indicates whether the list is sorted in ascending or descending order.
```
To perform another search with different selections, click **Modify Search**, and you are returned to your search page which is still populated with your original search information.

Information is constantly updated. Click **Refresh** on the Document List page to ensure real-time information.

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

### Document Status

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

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

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Inbound</th>
<th>Outbound</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Statuses</td>
<td>Search for documents with every available status.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>All Sent</td>
<td>Search for all Outbound documents with a Sent status, including:</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>- In Progress</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Available</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Received</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Hold</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- System Hold</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Redirected</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Modified</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Pending-Interconnect</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Pending-Comm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- In-Progress-Ignored</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Errors</td>
<td>Search for all Outbound documents with an Error status, including:</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>- Comm</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Data Syntax</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Data Validation</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Rules Engine</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Processing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>In-Progress</td>
<td>Search for all Outbound documents presently in-progress.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Available</td>
<td>Search for all documents available for pickup by the recipient.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Received</td>
<td>Document was received</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>
Hold
Sender, receiver, or a document rule placed a document on hold. This makes the document unavailable.

**Note:** To put a document on Hold the document must be Available. In addition, both the sender and receiver of the document must use Inovisworks.

System Hold
Inovisworks put the document on hold because the sender's or receiver's account has a Delinquent or Cancel status.
Call the GXS billing department to reactivate the account.

Duplicate
Duplication of a document already sent (see “Duplicate EDI Documents” on page 52).

Redirected
Document has been redirected within Inovisworks.

Modified
Original document was changed before being sent.

Pending Interconnect
Document is waiting to be placed inside a mailbag.

Pending Comm
Document has been mailbagged, and the mailbag is waiting to be sent.

In-Progress Ignored
Document is on a system that is down.
When the system comes back up, the document status changes to In-Progress.

Scheduled
Document placed on hold for a specified time and then released.

**TGO Integration Statuses**

Sender Pending Validation
Inovisworks sent the document to Trading Grid Online (TGO), and is waiting to receive a Success or Warning event from TGO.

Sender Suspended
Inovisworks received a Warning event from TGO, and the document is in quarantine mode from the sender side. Inovisworks is waiting to receive a Resume or Reject event from TGO.

Sender Rejected
Inovisworks quarantined the document, and the sender rejected the document from the TGO workflow. The document will not be delivered to the receiver.

Receiver Pending Validation
Inovisworks sent a document to TGO, and is waiting to receive a Success or Warning event from TGO.

Receiver Suspended
Inovisworks received a Warning event from TGO, and the document is in quarantine mode from receiver side. Inovisworks is waiting to receive a Resume or Reject event from TGO.

Receiver Rejected
Inovisworks quarantined the document, and the receiver rejected the document from the TGO workflow. The document will not be delivered to the receiver.
Document Errors

The table lists the document error types:

<table>
<thead>
<tr>
<th>Error Types</th>
<th>Description</th>
<th>Inbound</th>
<th>Outbound</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comm-Error</td>
<td>Document did not reach its recipient. Communications errors occur if:</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>- the database is down or the connection to the database is lost.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>- your gateway connection is incorrect or lost.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>- a sender transmits a non-EDI document to a receiver who uses async/bisync communications to get documents.</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Data Syntax Error</td>
<td>Document data is not formatted to standard.</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Data Validation Error</td>
<td>Document has an invalid receiver.</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Rules Engine Error</td>
<td>The rules engine encountered an error.</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Processing Error</td>
<td>An error other than communication, data syntax, data validation, or rules engine error.</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

**Duplicate EDI Documents**

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

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

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

**Viewing Document Details**

The Document Detail page shows detail for a specific document.

**To view document details**

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

Top portion of the Document Detail page:

- Click to view Document Content. See “Viewing Document Content” on page 56.
- Click to Export, Resend, Reprocess, or View Documents in Hex format.
- Click to view Document Event Tracking Graph (see “Viewing the Event Tracking Graph” on page 55)

Text summary of Document Details.

EDI Details and Transaction sets.
Bottom portion of the Document Detail page:

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

Event Tracking Graph description table.

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

Click to view Document Content (see “Viewing Document Content” on page 56).
**Viewing the Event Tracking Graph**

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

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

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

**Viewing an Event Node Summary**

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

See “Nodes and Label Descriptions” on page 56.
**Nodes and Label Descriptions**

The following nodes and labels display on the graph:

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

**Viewing Document Content**

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

**To view document content**

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

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

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

### Exporting Documents to Your Hard Drive

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

**To export a document to your hard drive**

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

---

**Exporting Documents to Your Hard Drive**

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

**To export a document to your hard drive**

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

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

**Printing Documents**

**To print a document**

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

**Resending and Reprocessing Documents**

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

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

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

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

<table>
<thead>
<tr>
<th>Do this:</th>
<th>For Outbound Documents with...</th>
<th>For Inbound Documents with...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resend</td>
<td>Comm-Errors</td>
<td>Received</td>
</tr>
<tr>
<td>Reprocess</td>
<td>Validation Errors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Syntax Errors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rules Engine Errors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Duplicate Errors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Processing Errors</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Redirected</td>
<td></td>
</tr>
</tbody>
</table>

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

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

**Resending an Outbound Document**

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

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

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

**Resending Documents Received in a Session**

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

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

To resend documents received in a session

1. Click the **Document Tracking** tab.
2. Using a Quick or Basic Search, select your search criteria.
3. Perform the appropriate action:
   - **Quick Search**: Type the **Session ID**.
     - A list of documents displays.
   - **Basic Search**: From the Status drop-down list, select **Available**. From the Level drop-down list, select **Session**.
     - Click **Session ID** to view the documents in the session.
4. Click **Quick Search** or **Basic Search**. The Document List page displays the results of your search.
DOCUMENT TRACKING TAB

Placing a Document on Hold

8 Select one or more sessions.
9 Click Resend Session(s).

A message indicates documents were resent.

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

Reprocessing Documents

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

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

To place a document back in the queue for reprocessing
1 Click the Document Tracking tab.
2 Search for documents with the status All Errors and Redirected using the Basic, Advanced, or the Quick Search.
   For information about document searches, see “Searching for Documents” on page 37.
3 From the Document List page, click the Document ID of the failed document needing reprocessing.
4 Make all corrections, and click Reprocess.
   A message asks you to confirm reprocessing.
5 Click Continue.
   A check mark under the Result field shows the document is in the queue.
6 Click Done and the Document List page opens.
   Note: You can place more than one document in the queue at one time (see “Selecting Multiple Interchanges” on page 61).

Placing a Document on Hold

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

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

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

To put a document on hold
1 Click the Document Tracking tab.
2 Search for documents using the Basic, Advanced, or the Quick Search.
   For information about document searches, see ”Searching for Documents” on page 37.
3 From the Document List page, select the Document ID of the Available document you need to place on Hold.
4 On the View Detail page, click Hold.
   A message requests the status change confirmation.
5 Click Continue.
A check mark under the Result field shows the document is on hold.

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

**Taking a Document off Hold**

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

**To take a document off hold**

1 Click the **Document Tracking** tab.

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

3 From the Document List page, click the **Document ID** of the Hold document you need.

4 On the View Detail page, click **Unhold**.
   A message requests the status change confirmation.

5 Click **Continue**.
   A check mark under the **Result** field shows the document is no longer on **Hold**.

6 Click **Done** and the Document List page opens.
   The document is **Available**.

**Selecting Multiple Interchanges**

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

**To select multiple interchanges**

1 Click the **Document Tracking** tab, and search for documents using the Basic or Advanced Search.
   For information about document searches, see “Searching for Documents” on page 37.

2 Select the status you need based on what you need to do with the documents:

<table>
<thead>
<tr>
<th>To do this with multiple documents:</th>
<th>Select this status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resend</td>
<td>Comm-Error</td>
</tr>
<tr>
<td>Reprocess</td>
<td>Validation Error</td>
</tr>
<tr>
<td></td>
<td>Data Syntax Error</td>
</tr>
<tr>
<td></td>
<td>Rules Engine Error</td>
</tr>
<tr>
<td></td>
<td>Duplicate Error</td>
</tr>
<tr>
<td></td>
<td>Processing Error</td>
</tr>
<tr>
<td></td>
<td>Redirected</td>
</tr>
<tr>
<td>Place them on Hold</td>
<td>Available</td>
</tr>
<tr>
<td>Remove the Hold status</td>
<td>Hold</td>
</tr>
</tbody>
</table>

3 From the Level drop-down list, select **Interchange**.

4 Type or select any other criteria.

5 Click **Basic Search** or **Advanced Search**.
The Document List page opens with the documents you can Resend, Reprocess, put on or take off Hold.

6 Click your selection.

<table>
<thead>
<tr>
<th>If you want to...</th>
<th>Select:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select specific documents</td>
<td>The needed check boxes.</td>
</tr>
<tr>
<td>Send all documents listed</td>
<td>Check All.</td>
</tr>
</tbody>
</table>

**Note:** If only one status is selected on the Document Summary page (for example, Resend, Reprocess, Hold, Unhold), all documents can be selected or cleared by selecting the checkbox in the column head.

7 Click **Resend**, **Reprocess**, **Hold**, or **Unhold**.
   A confirmation message opens.

8 Verify your action and click **Continue**.
   A check mark in the Result column shows the documents were Resent, Reprocessed, put on or removed from Hold.

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

**Monitoring Detailed TGO Message Information**

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

**To view detailed information about TGO messages**

1 Click the **Document Tracking** tab.

2 Search for documents (see “Searching for Documents” on page 37).

3 Click **Basic Search**.
   The Document List page opens, displaying the results of the search.
   Locate the transaction you want to view.

4 Click the Document ID.
   The View Detail page opens. In the Transaction Sets table, the last columns show TGO messages.
If your company sent the document, Inovisworks displays messages in the Sender Integration Messages column. If your company received the document, Inovisworks displays messages in the Receiver Integration Messages column.

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

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

The Transaction Details page opens.

**Tracking Functional Acknowledgements**

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

- “About Acknowledgement Processing and Status” on page 64
- “Searching for Original Documents or Acknowledgements by Status” on page 66
- “Viewing Acknowledgement Status in Document Details” on page 67
- “Viewing Original Documents for which Acknowledgements are Expected” on page 68
- “Viewing Transaction Details of Accepted Original Documents” on page 69
About Acknowledgement Processing and Status
FA Reconciliation is the process of verifying that original documents your company sends were received by your trading partners. For set up information, see “Acknowledgement Reconciliation” on page 183.

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

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

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

<table>
<thead>
<tr>
<th>If the FA is...</th>
<th>The original document’s acknowledgement status changes from Expected to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not received within 6 minutes</td>
<td>Warning</td>
</tr>
<tr>
<td>Not received within 15 minutes</td>
<td>Violation</td>
</tr>
</tbody>
</table>
| Received at any time      | ■ Received  
                          ■ Accepted  
                          ■ Rejected  
                          ■ Accepted w Errors |

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

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

■ “Original Documents Sent to Trading Partners” on page 65
■ “FAs Received from Trading Partners” on page 65
■ “Transaction Acknowledgement Status” on page 65
■ “Interchange Acknowledgement Status” on page 66
**ORIGINAL DOCUMENTS SENT TO TRADING PARTNERS**

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

<table>
<thead>
<tr>
<th>Original document &amp; interchange acknowledgement status during processing</th>
<th>Status before FA received</th>
<th>Status when FA received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Set</td>
<td>Expected</td>
<td>Accepted</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Accepted w Errors</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Rejected</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reconcile Error</td>
</tr>
<tr>
<td>Not Expected</td>
<td>Not Expected</td>
<td>Not Expected</td>
</tr>
</tbody>
</table>

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

**FAS RECEIVED FROM TRADING PARTNERS**

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

<table>
<thead>
<tr>
<th>FA &amp; interchange acknowledgement status during processing</th>
<th>FA &amp; interchange acknowledgement after reconciliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Set</td>
<td>Matched</td>
</tr>
<tr>
<td></td>
<td>Not Matched</td>
</tr>
</tbody>
</table>

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

**TRANSACTION ACKNOWLEDGEMENT STATUS**

These acknowledgement statuses are applied to individual transactions.

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

Tracking Functional Acknowledgements

<table>
<thead>
<tr>
<th>Transaction Acknowledgement Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Set</td>
<td>Reconciliation is processing or errored before a status was set.</td>
</tr>
<tr>
<td>Matched</td>
<td>All monitored acknowledgements in the transaction were matched.</td>
</tr>
<tr>
<td>Not Matched</td>
<td>Reconciliation could not match at least one monitored acknowledgement in the FA transaction.</td>
</tr>
<tr>
<td>Reconcile Error</td>
<td>Error occurred during reconciliation.</td>
</tr>
</tbody>
</table>

INTERCHANGE ACKNOWLEDGEMENT STATUS

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

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

Searching for Original Documents or Acknowledgements by Status

To search for original documents or FAs by acknowledgement status

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

![Image of Document Tracking Tab](image-url)

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

3 Select a date range and other selection criteria.

4 Click **Basic Search**.

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

**Viewing Acknowledgement Status in Document Details**

**To view FA processing status for original documents and FAs**

1 Click the **Document Tracking** tab.

2 In the Level drop-down list, select **Interchange** or **Transaction**. In Interchange/Transaction Ack Status, select blank (all statuses).

3 Select a date range and other selection criteria.

4 Click **Basic Search**.

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

![Document Tracking Table](image-url)

5 Click **Document ID**.

*Click to view document details.*
The View Details page opens.

### Viewing Original Documents for which Acknowledgements are Expected

To view original documents for which acknowledgements are expected

1. Click the **Document Tracking** tab.
2. In the Level drop-down list, select **Transaction**. In Transaction Ack Status, select **Expected**.
3. Select a date range and other selection criteria > Click **Basic Search**.
   
   A list of original documents for which FAs are expected display.

4. Click the transaction details link.
Acknowledgement status information displays.

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

**Viewing Transaction Details of Accepted Original Documents**

**To view transaction details of accepted original documents**

1. Click the **Document Tracking** tab.
2. In the Level drop-down list, select **Transaction**. In Transaction Ack Status, select **Accepted**.
3. Select a date range and other selection criteria > Click **Basic Search**.
   
   A list of all original documents that have been accepted display.

4. Click the transaction details link.
Transactional details for the original documents display.

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

**Viewing Transaction Details of Acknowledgements with Errors**

**To view transaction details of acknowledgements with errors**

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

2. In the Level drop-down list, select **Transaction**. In Transaction Ack Status, select **All Errors**.

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

A list of all FAs with an error status display.

![Table showing transaction details](image)

Click to view transaction details.

4. Click the transaction details link.
Transaction details for the FA and a list of monitored original documents display.

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

### Manually Acknowledging Original Documents

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

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

**To manually acknowledge original documents**

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

4. Click **Manually Acknowledge**.

---

**For the original document, shows:**

- **Acknowledgement status and error message**
- **FA reconciliation configuration.**
5 Indicate if the acknowledgement was Accepted or Rejected, and describe why you are manually acknowledging the original transaction.

![Acknowledgement Status](image)

6 Click Submit.

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

![After being manually acknowledged, the original document’s acknowledgement status changes from Expected to Accepted or Rejected.](image)

**Changing Deadlines Created by an Acknowledgement Monitor**

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

**To change timeout settings created by an FA monitor**

1 Click the Document Tracking tab.

2 In the Basic Search area, select values and perform a document search either at the interchange or transaction level > click **Basic Search**.

3 Perform the appropriate action:

<table>
<thead>
<tr>
<th>If you search at this level...</th>
<th>Do this...</th>
</tr>
</thead>
</table>
| Interchange                    | 4 Locate the document you want to view.  
|                                | 5 Click the Document ID.  
|                                | 6 In the Details column in the EDI Detail area on the View Detail page, click the link. |
| Transaction                    | 7 Locate the document you want to view.  
|                                | 8 In the Details column on the Document List page, click the link. |

The Transaction Details page opens.
9 At the top of the page, click **Change FA Deadline**.

The Change FA Deadlines page opens.

10 Type or select the:
- Timeout Type—Warning or Violation.
- Timeout Date/Time—Date and time for the new deadline.
- Comments—Type comments about why the deadline is being changed.

11 Click **Submit** to create the new timeout deadline.
At the end of each billing cycle, Inovisworks generates standard reports. The reports include:

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Billing Usage Report</td>
<td>Shows network activity for a specific month and year based on document and character counts (see “Billing Usage Report” on page 76).</td>
</tr>
<tr>
<td>Interchange Usage Report</td>
<td>Summarizes the traffic sent and received between an account (PSN) and interconnecting networks during the previous month (see “Interconnect Usage Report” on page 87).</td>
</tr>
<tr>
<td>Managed Services Reports</td>
<td>Lists three real-time reports including:</td>
</tr>
<tr>
<td></td>
<td>- Document History</td>
</tr>
<tr>
<td></td>
<td>- Trading partner History</td>
</tr>
<tr>
<td></td>
<td>- Transaction Summary</td>
</tr>
<tr>
<td>(see “Managed Services Reports” on</td>
<td></td>
</tr>
<tr>
<td>page 88)</td>
<td>Trade Partner Report</td>
</tr>
<tr>
<td></td>
<td>Lists Trading Partners at either the Interchange level or Transaction level (see &quot;Trading Partner Report” on page 97).</td>
</tr>
<tr>
<td>FTP Interactive Audit Report</td>
<td>Provides synchronous audit feedback during or after an FTP session (see “FTP Interactive Audit Report” on page 79).</td>
</tr>
<tr>
<td>FTP On-Demand Report</td>
<td>Lists document totals for a defined time period (see “FTP On-Demand Report” on page 84).</td>
</tr>
<tr>
<td>Payer Beneficiary Reports</td>
<td>List Report—Lists all beneficiaries of a payer beneficiary relationship.</td>
</tr>
<tr>
<td></td>
<td>Usage Report—Provides usage information for payer beneficiary relationships.</td>
</tr>
<tr>
<td></td>
<td>(see “Payer Beneficiary Reports” on page 90).</td>
</tr>
<tr>
<td>Recurring Reports</td>
<td>Document Summary—Regular report that lists documents processed in time period.</td>
</tr>
<tr>
<td></td>
<td>Trading Partner—Regular report that lists trading partners for all or selected accounts.</td>
</tr>
<tr>
<td></td>
<td>(see “Recurring Reports” on page 92).</td>
</tr>
</tbody>
</table>
Billing Usage Report

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

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

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

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

Viewing a Billing Usage Report

To view a Billing Usage Report

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

The Billing Usage Report opens matching your selection criteria.

4. To view detailed report information, click a link under the Total columns.
Detailed information for the report period displays.

- **Account (PIN):** 4422943991
- **Usage Date:** Aug 2007

<table>
<thead>
<tr>
<th>Sent Units</th>
<th>Sent Characters</th>
<th>94410</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received Units</td>
<td>Received Characters</td>
<td>0</td>
</tr>
<tr>
<td>Exported Units</td>
<td>Exported Characters</td>
<td>0</td>
</tr>
<tr>
<td>Initiated Units</td>
<td>Initiated Characters</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>Total</td>
<td>94410</td>
</tr>
<tr>
<td>Free Units</td>
<td>Free Units</td>
<td>0</td>
</tr>
<tr>
<td>Adjusted Total</td>
<td>Adjusted Total</td>
<td>94410</td>
</tr>
</tbody>
</table>

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

**Billing Usage Report Description**

<table>
<thead>
<tr>
<th>Report Area</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Counts</td>
<td>Number of documents sent, received, exported, and initiated through the network during peak and off-peak times.</td>
</tr>
<tr>
<td>Character Counts</td>
<td>Number of characters, based on document size, that passed through the network during peak and off-peak times.</td>
</tr>
</tbody>
</table>

**Peak and Off-Peak Times**

- **Peak Time:** Monday through Friday, 6 a.m.—8 p.m. EST
- **Off Peak Time:** Monday through Friday, 8 p.m.—6 a.m. EST

All day Saturday and Sunday.

**Downloading a Billing Usage Report**

To download a Billing Usage Report

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

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

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

Viewing a Document Summary Report

To view the Document Summary Report

1. Click the Reports tab > Document Summary.

   The Document Summary Search page opens.

   Advanced column option provides additional information in the .csv file (see “Columns” on page 79).

   Total number of documents in the report.

   Click to download the report as a CSV file (see “Downloading a Document Summary Report” on page 79).

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>#Direction</td>
<td>Whether your summary report is for:</td>
</tr>
<tr>
<td></td>
<td>▪ Inbound documents</td>
</tr>
<tr>
<td></td>
<td>▪ Outbound documents</td>
</tr>
<tr>
<td></td>
<td>▪ Both</td>
</tr>
<tr>
<td>#Start/End Date</td>
<td>Date range for which you want your summary report.</td>
</tr>
<tr>
<td>#Start/End Time</td>
<td>Time period for which you want your summary.</td>
</tr>
<tr>
<td>#Columns</td>
<td>Column headings in the .csv file:</td>
</tr>
<tr>
<td></td>
<td>▪ Basic—Basic column headings</td>
</tr>
<tr>
<td></td>
<td>▪ Advanced—Basic column headings, plus sender name, receiver name, transaction count, and functional group count</td>
</tr>
<tr>
<td>Document Type</td>
<td>Document type from the drop-down list. For example, INV—Invoice (810). If the document type is not listed, type it here.</td>
</tr>
<tr>
<td>or Free Text Format</td>
<td></td>
</tr>
<tr>
<td>My Trading ID</td>
<td>Trading ID for the account.</td>
</tr>
<tr>
<td>My Qualifier</td>
<td>From the drop-down list, the qualifier for the account.</td>
</tr>
<tr>
<td>or Free Text Format</td>
<td></td>
</tr>
<tr>
<td>Partner Trading ID</td>
<td>Trading Partner’s trading ID.</td>
</tr>
<tr>
<td>Partner Qualifier</td>
<td>From the drop-down list, the Trading Partner’s qualifier.</td>
</tr>
<tr>
<td>or Free Text Format</td>
<td></td>
</tr>
<tr>
<td>ICN</td>
<td>For EDI documents, the Interchange Control Number at the Interchange level.</td>
</tr>
</tbody>
</table>

Downloading a Document Summary Report

To download a Document Summary Report
1. Click Go.
2. Click Download CSV file.
3. Select Save.
4. Navigate to where you want to save the file > click Save.

FTP Interactive Audit Report

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

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

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

To generate an FTP Interactive Audit Report

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

<table>
<thead>
<tr>
<th>If you want to return a ...</th>
<th>Type...</th>
</tr>
</thead>
</table>
| Synchronous response for each interchange in the file during a PUT or GET | - site report txstatus  
  (generates the report in CSV format)                                           |
|                             | or                                                                                        |
|                             | - site report txstatus format_fixed  
  FTP generates synchronous audit feedback on the screen  
  (see “211 System Status Messages” on page 80).                                     |
| Synchronous response for each file transfer | - site report txstatusx  
  (generates the report in CSV format)                                                 |
|                             | or                                                                                        |
|                             | - site report txstatusx format_fixed  
  FTP generates synchronous audit feedback on the screen  
  (see “226 System Status Messages” on page 81).                                       |
| Response after issuing the QUIT command. The response lists each interchange PUT or GET during the session. | - site report sessionstatus  
  (generates the report in CSV format)                                                  |
|                             | or                                                                                        |
|                             | - site report sessionstatus format_fixed  
  FTP generates audit feedback after the session is complete  
  (see “221 Service Closing Control Connection Messages” on page 82).                   |

211 System Status Messages

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

Data and Format

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

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

In fixed format, the data displays in fixed positions:

<table>
<thead>
<tr>
<th>Field</th>
<th>Length</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document ID</td>
<td>11</td>
<td>0-10</td>
</tr>
<tr>
<td>Sender Alias</td>
<td>35</td>
<td>11-45</td>
</tr>
<tr>
<td>Sender Qualifier</td>
<td>35</td>
<td>46-80</td>
</tr>
<tr>
<td>Receiver Alias</td>
<td>35</td>
<td>81-115</td>
</tr>
<tr>
<td>Receiver Qualifier</td>
<td>35</td>
<td>116-150</td>
</tr>
<tr>
<td>Interchange Control Number</td>
<td>30</td>
<td>151-180</td>
</tr>
</tbody>
</table>
### Example: CSV Format (site report txstatus)

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Length</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Session ID</td>
<td>11</td>
<td>181-191</td>
</tr>
<tr>
<td>Document Type</td>
<td>30</td>
<td>192-221</td>
</tr>
<tr>
<td>Size</td>
<td>11</td>
<td>222-232</td>
</tr>
<tr>
<td>Status</td>
<td>3</td>
<td>233-235</td>
</tr>
</tbody>
</table>

### Example: Fixed Format (site report txstatus)

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

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

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

**Example: CSV Format (site report txstatusx)**

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

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

```
STOR 2015
150 Opened ASCII node data connection.
226 BEGIN UPLOAD REPORT
20150916,680162FTP1,22,20150916,22,2000001188,173127569,PO,940,OK
281070149,680162FTP1,22,20150916,22,2000001188,173127569,PO,940,OK
END UPLOAD REPORT
226 Transfer complete.
```

**Example: Fixed Format (site report txstatusx)**

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

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

```
226 messages show the completion of each file transfer.
```

```
221 Service Closing Control Connection Messages
```

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

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

**Data and Format**

The 221 messages display this data, which is shown in CSV format:
221 You have transferred 3682 bytes in <x> file(s):
<DOCID>,<SENDERALIAS>, <SENDERQUAL>, <RECVALIAS>, <RECVQUAL>, <ICN>, <SESSIONID>, <DOCTYPE>, <SIZE>, <STATUS>

In fixed format, the data displays in fixed positions:

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

Example: CSV Format (site report sessionstatus)
This report was generated using the `site report sessionstatus` command.

The `site report sessionstatus` command generates feedback after a session is complete. Feedback is displayed in CSV format.
Example: Fixed Format (site report sessionstatus)
This report was generated using the `site report sessionstatus format_fixed` command.

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

```
220 user 41290023B logged in. Session ID 9478
ftp> cd tovan/ed1
250 CWD command successful.
ftp> site report sessionstatus format_fixed
200 generating report sessionstatus.
ftp> put test1.ed1
200 PORT command successful.
210 Openning ASCII mode data connection.
226 Transfer complete.
ftp: 1841 bytes sent in 0.60seconds 1841000.00bytes/sec.
ftp> put test2.ed1
200 PORT command successful.
210 Openning ASCII mode data connection.
226 Transfer complete.
ftp: 1841 bytes sent in 0.60seconds 1841000.00bytes/sec.
ftp> bye
221 you have transferred 3682 bytes in 2 file(s): 38704 POOBAR 100008035 100008035
TESTINC 9478 PO 2891 OK 38705 POOBAR
TESTINC PO 2891 OK |
```

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

The pipe (|) symbol separates documents.

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

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

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

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

**To generate the FTP On-Demand Report**
- At the FTP command line, type:

  ```
  site report query <specifier>
  ```
EXAMPLES
site report query session=1103963987
site report query since_last status=err
site report query start=200505100000 end=200505150000

<table>
<thead>
<tr>
<th>Parameter Type</th>
<th>Parameter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specifiers (one is required)</td>
<td>start=yyyyymmddhhmm</td>
</tr>
<tr>
<td></td>
<td>end=yyyyymmddhhmm</td>
</tr>
<tr>
<td></td>
<td>since_last</td>
</tr>
<tr>
<td></td>
<td>session=&lt;sessionid&gt;</td>
</tr>
<tr>
<td>Filters (optional)</td>
<td>status=ok, err, all</td>
</tr>
<tr>
<td></td>
<td>direction=in, out, both</td>
</tr>
<tr>
<td></td>
<td>tp=&lt;alias.qual&gt;</td>
</tr>
<tr>
<td></td>
<td>icn=&lt;interchange CtrlNum&gt;</td>
</tr>
<tr>
<td></td>
<td>type=&lt;doctype&gt;</td>
</tr>
<tr>
<td>Format (optional)</td>
<td>format_csv</td>
</tr>
<tr>
<td></td>
<td>format_fixed</td>
</tr>
</tbody>
</table>

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

Retrieving Files from the FTP Reports Directory
You can retrieve/get/pull several reports from the FTP reports directory, including the:

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

To retrieve reports from the reports directory
1. At the command line in the home directory of the FTP server, change the directory to reports by typing:
   ```
cd reports
   ```
2. Retrieve the files by typing:
   ```
get <reportID>.rpt
   ```
   or
   ```
   mget *
   ```
   (to get all reports)
Example Session to Create an FTP On-Demand Report

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

```
> site report query session=8705 type=PO
> Generating report query.
> ftp> cd reports
> 200 command successful.
> ftp> ls
> 200 PORT command successful.
> 130 Opening ASCII mode data connection.
> 36528.rpt
> 116 Transfer complete.
> ftp> get 36528.rpt
> 200 PORT command successful.
> 130 Opening ASCII mode data connection.
> 226 Transfer complete.
> ftp> bye
> 221 You have transferred 105 bytes in 1 file(s).
```

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

Data, Format, and Example

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

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

**EXAMPLE**

```
```

In fixed format, the data displays in fixed positions:

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

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

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

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

Viewing the Interconnect Usage Report

To view the Interconnect Usage Report

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

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

3 To download the report, click Download CSV File.
Interconnect Usage Report Column Descriptions

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

Managed Services Reports

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

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

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

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

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

Managed Services Document Summary Report

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

To open the Managed Services Document Summary Report

2. Use the current month (default) or select the month from the drop-down list, and click Go.
The Document Summary Report opens.

3 To download the report to a .csv file, click Download CSV File. You can then import the report into a spreadsheet for presentation and printing.

Note: CSV download is not an option if your report contains zero rows. Your report does not open within Inovisworks if it is more than 100 rows, and must be downloaded as a .csv file.

**Managed Services Trading Partner History Report**

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

**To open the Managed Services Trading Partner History Report**

1 Click Reports tab > Managed Services > Trading Partner History Report.

2 Use the current month (default) or select the month from the drop-down list, and click Go.

The Trading Partner History Report opens.

Note: CSV download is not an option if your report contains zero rows. Your report does not open within Inovisworks if it is more than 100 rows, and must be downloaded as a .csv file.

**Managed Services Transaction Summary Report**

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

**To open the Managed Services Transaction Summary Report**

1 Click Reports tab > Managed Services > Transaction Summary Report.

2 Use the current month (default) or select the month from the drop-down list, and click Go.
REPORTS TAB
Payer Beneficiary Reports

The Transaction Summary Report opens

To download the report to a .csv file, click Download CSV File.
You can then import the report into a spreadsheet for presentation and printing.

Note: CSV download is not an option if your report contains zero rows.
Your report does not open within Inovisworks if it is more than 100 rows, and must be downloaded as a .csv file.

Payer Beneficiary Reports
A payer-beneficiary relationship exists when one party, called the payer, pays for all of another party’s fees for GXS mailboxes or services. Payer-beneficiary relationships can exist between:
- You and your trading partners
- Different organizational units within your company

Two Payer Beneficiary reports are available:
- Payer Beneficiary List (see “Viewing the Payer Beneficiary List Report” on page 90)
- Payer Beneficiary Usage (see “Viewing the Payer Beneficiary Usage Report” on page 91)

After generating the reports, you can download them to your hard drive as comma-separated value files (.csv). The files will open in any application that reads .csv files, such as Microsoft Excel.
- “Downloading a Payer Beneficiary List or Usage Report” on page 92

Viewing the Payer Beneficiary List Report

To view the Payer Beneficiary List Report
1 Click the Reports tab > Payer Beneficiary > Payer Beneficiary List.

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

2 Click Back to go back to the Reports tab.
Payer Beneficiary List Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account (PSN)</td>
<td>Account (PSN) for the payer’s beneficiary.</td>
</tr>
<tr>
<td>Company Name</td>
<td>Name of the payer’s beneficiary company or division.</td>
</tr>
<tr>
<td>Service</td>
<td>Mailbox or service for which the payer is being billed.</td>
</tr>
</tbody>
</table>

Viewing the Payer Beneficiary Usage Report

**To view the Payer Beneficiary Usage Report**

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

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

2. Click **Back** to go back to the Payer Beneficiary Reports page.
Payer Beneficiary Usage Report Column Descriptions

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

Downloading a Payer Beneficiary List or Usage Report

To download a Payer Beneficiary List or Usage Report

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

Recurring Reports

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

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

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

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

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

To define a Recurring Document Summary Report


2. Type or select the criteria for the report (see “Recurring Document Summary Report Field Descriptions” on page 94).
   - Status and Frequency
   - Accounts on which the report should be run
   - Format, display, column, and delivery options

3. Click Save.

The report is delivered at the requested frequency using the requested delivery method.
Recurring Document Summary Report Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Enabled—To activate the recurring report.</td>
</tr>
<tr>
<td></td>
<td>Disabled—To stop the recurring report.</td>
</tr>
<tr>
<td>Frequency</td>
<td>Report frequency. Reports can be generated:</td>
</tr>
<tr>
<td></td>
<td>Weekly—Filters data on a weekly basis. Report is generated Sunday at 3 a.m. EST for the previous week’s data.</td>
</tr>
<tr>
<td></td>
<td>Daily—Filters data on a daily basis. Report is generated at 2 a.m. EST for the previous day’s data.</td>
</tr>
<tr>
<td></td>
<td>Hourly—Filters data on an hourly basis. Report is generated 20 minutes after the hour for data processed the previous hour.</td>
</tr>
<tr>
<td>Accounts</td>
<td>Accounts for which the report will be generated:</td>
</tr>
<tr>
<td></td>
<td>All (including beneficiary accounts)—All accounts (PSNs) you can maintain, including accounts you are paying for through payer-beneficiary relationships.</td>
</tr>
<tr>
<td></td>
<td>Only My Accounts—Only accounts (PSNs) you can maintain.</td>
</tr>
<tr>
<td></td>
<td>Selected Accounts—Multiple accounts (PSNs) you can maintain (including beneficiaries). Use to generate the report for a subset of accounts.</td>
</tr>
<tr>
<td>File Format</td>
<td>Fixed-length fields—To format report as fixed-length fields, which allows programmatic analysis of the data.</td>
</tr>
<tr>
<td></td>
<td>CSV—To format report as comma-separated values. Report can be imported into a spreadsheet application, such as Microsoft Excel.</td>
</tr>
<tr>
<td>Display Options</td>
<td>Include Column Headers—To include column headings in the report.</td>
</tr>
<tr>
<td></td>
<td>Include Report Trailer—To include an end of transmission line at the end of the report.</td>
</tr>
<tr>
<td>Column Options</td>
<td>Basic—To include basic column headings</td>
</tr>
<tr>
<td></td>
<td>Advanced—To include basic column headings, plus transaction and functional group counts.</td>
</tr>
<tr>
<td>Delivery Options</td>
<td>FTP/AS2 Mailbox—Displays only if you transmit files using FTP or AS2. Deliver report to the FTP reports directory or send it as a binary file over AS2.</td>
</tr>
<tr>
<td></td>
<td>PSN—Displays only if you transmit files using FTP or AS2. Mailbox to which the report will be delivered.</td>
</tr>
<tr>
<td></td>
<td>Email—Email addresses for the login ID.</td>
</tr>
<tr>
<td>Billing</td>
<td>Account (PSN) to which any charges for the recurring report will be billed (based on your billing plan).</td>
</tr>
</tbody>
</table>

Defining a Recurring Trading Partner Report

To define a Recurring Trading Partner Report
1. Click the Reports tab > Setup Recurring > Trading Partner Report.
The Recurring Report Trading Partner page opens.

2 Type or select the criteria for the report (see “Recurring Trading Partner Report Field Descriptions” on page 96).
   - Status and Frequency
   - Accounts on which the report should be run
   - Format, display, column, and delivery options

3 Click **Save**.

   The report is delivered at the requested frequency using the requested delivery method.
   - “Retrieving Files from the FTP Reports Directory” on page 85
   - “Viewing Recurring Reports in Document Tracking” on page 96
   - “Stopping a Recurring Report” on page 97
## Viewing Recurring Reports in Document Tracking

**To view recurring reports using Document Tracking**

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

4. Click **Advanced Search**.

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

### Recurring Trading Partner Report Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Status</strong></td>
<td>- Enabled—To activate the recurring report.</td>
</tr>
<tr>
<td></td>
<td>- Disabled—To stop the recurring report.</td>
</tr>
<tr>
<td><strong>Frequency</strong></td>
<td>Report frequency. Reports can be generated:</td>
</tr>
<tr>
<td></td>
<td>- Weekly—Filters data on a weekly basis. Report is generated Sunday at 3 a.m. EST for the previous week’s data.</td>
</tr>
<tr>
<td></td>
<td>- Monthly—Filters data on a monthly basis. Report is generated at 3 a.m. EST on the first day of the month.</td>
</tr>
<tr>
<td><strong>Accounts</strong></td>
<td>Accounts for which the report will be generated:</td>
</tr>
<tr>
<td></td>
<td>- All (including beneficiary accounts)—All accounts (PSNs) you can maintain, including accounts you are paying for through payer-beneficiary relationships.</td>
</tr>
<tr>
<td></td>
<td>- Only My Accounts—Only accounts (PSNs) you can maintain.</td>
</tr>
<tr>
<td></td>
<td>- Selected Accounts—Multiple accounts (PSNs) you can maintain (including beneficiaries). Use to generate the report for a subset of accounts.</td>
</tr>
<tr>
<td><strong>File Format</strong></td>
<td>- Fixed-length fields—To format report as fixed-length fields, which allows programmatic analysis of the data.</td>
</tr>
<tr>
<td></td>
<td>- CSV—To format report as comma-separated values. Report can be imported into a spreadsheet application, such as Microsoft Excel.</td>
</tr>
<tr>
<td><strong>Display Options</strong></td>
<td>Include Column Headers—To include column headings in the report.</td>
</tr>
<tr>
<td></td>
<td>- Include Report Trailer—To include an end of transmission line at the end of the report.</td>
</tr>
<tr>
<td><strong>Delivery Options</strong></td>
<td>FTP/AS2 Mailbox—Displays only if you transmit files using FTP or AS2. Deliver report to the FTP reports directory or send it as a binary file over AS2.</td>
</tr>
<tr>
<td></td>
<td>- PSN—Displays only if you transmit files using FTP or AS2. Mailbox to which the report will be delivered.</td>
</tr>
<tr>
<td></td>
<td>- Email—Email addresses for the login ID.</td>
</tr>
<tr>
<td><strong>Billing</strong></td>
<td>Account (PSN) to which any charges for the recurring report will be billed (based on your billing plan).</td>
</tr>
</tbody>
</table>
5 Click the **Document ID**.
   The View Detail page opens.

6 To view the details of the report, click **View Content**.
   The report displays (see “Data, Format, and Example” on page 86).
   **Note:** If no data is available for a recurring report, the report is blank (in other words, it displays nothing).

**Stopping a Recurring Report**

**To stop a Recurring Report**
1 Click the **Reports** tab > **Setup Recurring**.
2 Select the **Document Summary Report** or **Trading Partner Report**.
   The appropriate Recurring Report page opens.
3 Select **Disabled**.
   The recurring report has been stopped.

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

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

<table>
<thead>
<tr>
<th>Display...</th>
<th>If...</th>
</tr>
</thead>
<tbody>
<tr>
<td>A series of commas (,,,,,,,,,,,,,,,,,,,,,)</td>
<td>Delivered using AS2</td>
</tr>
<tr>
<td>Nothing (be blank)</td>
<td>Viewed using the Document Tracking tab</td>
</tr>
</tbody>
</table>

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

- Account (PSN) level information about the trading partners with which your company exchanges documents. Selecting this option eliminates redundant trading ID/qualifier information.

- Transaction level (GS or functional group) or XML or binary information about exchanged documents for trading partners or account (PSNs).

- Usage information for trading partners or account (PSNs). Usage information shows your company’s network activity based on the number of documents or characters exchanged.
After selecting a trading partner, you can view the trading partner’s contact information.

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

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

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

**Viewing a Trading Partner Report**

**To view a Trading Partner Report**

1. Select a single account (PSN).
2. Click the **Reports** tab > **Trading Partner**.
   The page displays the trading partners with which you have exchanged interchange-level documents using the Inovisworks network.

3. Perform the appropriate action:

<table>
<thead>
<tr>
<th>If you want the report to include...</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account (PSN) level information (eliminates redundant trading ID/qualifiers)</td>
<td>4. Select <strong>Account (PSN)</strong>.</td>
</tr>
<tr>
<td>Transaction level (GS or functional group level) or XML or binary information</td>
<td>5. Click <strong>Refresh List</strong>.</td>
</tr>
<tr>
<td><strong>Include GS level trading partners.</strong></td>
<td>6. Select <strong>Include GS level trading partners</strong>.</td>
</tr>
<tr>
<td><strong>Show Usage</strong></td>
<td>7. Click <strong>Refresh List</strong>.</td>
</tr>
</tbody>
</table>
If you want the report to include...

| Usage information for the trading partner for the previous month
| Do this...

8 Select **Show Usage**.

9 Click **Refresh List**.

Trading partner contact information

10 Select the trading partner.

11 Click **View**.

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

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

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

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

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

**Downloading a Trading Partner Report**

**To download a Trading Partner Report**

1. Click Download CSV file.
2. Select Save.

   Navigate to where you want to save the file > click **Save**.
novisworks customers assigned the Customer Admin role are able to work with all company accounts. Those assigned the Customer User role work with accounts assigned to their login ID.

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

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

**Maintaining Accounts**

For account maintenance information, see:

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

**Viewing an Account**

**To view an account**

1. Click the Administration tab > Account.
   The Account List page opens.

2. Select the account you want to view > click View.
   Information about the selected account opens.

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

**Editing an Account**

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

1. Click the Administration tab > Account.
   The Account List page opens.

2. Select the account you want > click Edit.
   Account Name, Trading Profile, Outbound File Configuration, and Technical Contact information opens.

3. Edit the account information.

4. Click Update Account.
   The account is updated and the Account List page opens.

Adding a Trading Profile to an Account

To add a trading profile to an account

1. Click the Administration tab > Account.
   The Account List page opens.

2. Select the account you want > click Edit.

3. In the Trading Profile area, click Add.
   The Add Trading Profile page opens.

4. Type the trading ID and qualifier. If you want this to be your default trading profile, select the Set as default? check box.

5. Click Add Trading Profile.
   The new trading profile is added to the trading profile list.

6. Click Update Account.
   The account is updated and the Account List page opens.

Adding an Account (Service) to an Existing Profile

To add an account (service)

1. Click the Administration tab > Account.
   The Account List page opens.

2. Click Add.
   The Add Account services list opens.

3. Select the service you need and click Continue.

4. If the service you’ve selected is online enabled, read the License Subscriber Agreement, select the check box indicating you have read and agree to the agreement, then click Accept.
The Add Account page opens.

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

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

See the page graphic for clarity.

6 Type or select the remaining required information.

Important: For each account (service), the user’s email address must be unique.
7 Click Step 3.

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

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

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

8 Verify the information and click Register.

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

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

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

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

For International support outside EMEA, call +1 404.467.3806

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**Maintaining Archive and Restore**

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

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

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

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

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

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

Archived Information

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

Encrypted and Decrypted Documents

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

<table>
<thead>
<tr>
<th>If you send an...</th>
<th>And Inovisworks...</th>
<th>Inovisworks archives the...</th>
</tr>
</thead>
</table>
| Encrypted file   | □ Sends the encrypted file to the receiver.  
|                  | □ The receiver decrypts the file.          | Encrypted file |
| Encrypted file   | □ Decrypts the file using the Simple Decrypt  
|                  | or PGP Decrypt inbound rule.                | Decrypted file |
|                  | □ Routes and delivers the decrypted file to  
|                  | the receiver.                              |              |
| Unencrypted file | □ Encrypts the file using the Simple or      
|                  | Encrypt or PGP Encrypt router rule.         | Encrypted file |
|                  | □ Routes and delivers the encrypted file to  
|                  | the receiver.                              |              |

Viewing Your Archive and Restore Settings

To view your archive and restore settings

1. Click the Administration tab > Customer.

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

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

<table>
<thead>
<tr>
<th>The Archive check box is...</th>
<th>Grace period is...</th>
<th>Archive &amp; restore status is...</th>
<th>You can perform these actions...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selected</td>
<td>NA</td>
<td>Enabled</td>
<td>Search for, view, and export archived documents</td>
</tr>
</tbody>
</table>
| Deselected                  | In effect          | On Hold                        | Cannot search for, view, or export archived documents.  
**Note:** To reactivate the service, call GXS. |
| Has expired                 | Disabled           |                                | Cannot search for, view, or export archived documents.  
**Note:** To reactivate the service, call GXS. |

**Adding an Archive and Restore Configuration**

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

**To set up an archive and restore configuration**

1. Click the **Administration tab > Archive & Restore > Archive Configurations > Add**.
2. Type the name and description of the configuration.
3. Select the accounts (PSNs) to which the archive and restore settings apply.
4. In Retention Period, type the period of time > select days, months or years for which documents are to be archived.
5. Click **Add Archive Configuration**.

**Viewing an Archive and Restore Configuration**

**To view an archive and restore configuration**

1. Click the **Administration tab > Archive & Restore > Archive Configurations**.
2. Select the configuration > click **View**.
   
   **Note:** If you want to make changes to the configuration, click **Edit Archive Configuration**.
Editing an Archive and Restore Configuration

To edit an archive and restore configuration
1. Click the Administration tab > Archive & Restore > Archive Configurations.
2. Select the configuration > click Edit.
3. Make changes to the configuration.
4. Click Update Archive Configuration.

Deleting an Archive and Restore Configuration

To delete an archive and restore configuration
1. Click the Administration tab > Archive & Restore > Archive Configurations.
2. Select the configuration > click Delete.
3. Verify that you want to delete the configuration > click Delete Archive Configuration.

Setting Up Email Addresses for Archive and Restore Changes

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

Searching for Archived Documents

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

You can search for archived documents at the document level.

To search for archived documents
1. Click the Administration tab > Archive & Restore > Archive Search.
The Archive & Restore Search page opens.

2 Determine the appropriate action.

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

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

7 Perform the appropriate action:

- “Viewing Archived Document Details” on page 109
“Viewing the Content of Archived Documents” on page 110
“Restoring Archived Documents” on page 110

Quick Search Fields
You can perform a quick search using these fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Assigned Number</td>
<td>Number assigned to the document, such as a purchase order number.</td>
</tr>
<tr>
<td>Document ID</td>
<td>Identifier that establishes the identity of a document on the GXS network. Example: 215166988</td>
</tr>
</tbody>
</table>

Basic Search Fields
You can perform a basic search using these fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direction</td>
<td>Direction of the document relative to the customer:</td>
</tr>
<tr>
<td></td>
<td>- Inbound</td>
</tr>
<tr>
<td></td>
<td>- Outbound</td>
</tr>
<tr>
<td></td>
<td>- Both</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the document. The status selection is determined by the selected direction.</td>
</tr>
<tr>
<td>File Name</td>
<td>Exact name of a file.</td>
</tr>
<tr>
<td>Interchange Control Number</td>
<td>For EDI documents, interchange control number at the interchange level.</td>
</tr>
<tr>
<td>Start Date/End Date</td>
<td>Date range for the search; that is, the date of the archived document.</td>
</tr>
<tr>
<td>Start Time/End Time</td>
<td>Time period for the search, the time of the archived document.</td>
</tr>
<tr>
<td>Sender Trading ID</td>
<td>Trading ID for the sender of the document, including a qualifier. Example: 2830202782/12</td>
</tr>
<tr>
<td>Recipient Trading ID</td>
<td>Trading ID for the recipient of the document, including a qualifier. Example: 7730202785/ZZ</td>
</tr>
</tbody>
</table>

Viewing Archived Document Details
You can view detailed information about archived documents.

To view an archived document's details
1 Click the Administration tab > Archive & Restore > Archive Search.
2 Search for archived documents (see “Searching for Archived Documents” on page 107).
3 Click the Document ID.
The Archived Document Details page opens.

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

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

Viewing the Content of Archived Documents

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

To view the details of archived documents
1. Click the Administration tab > Archive & Restore > Archive Search.
2. Search for archived documents (see “Searching for Archived Documents” on page 107).
3. Click the Document ID.
4. Click View Archived Document.

Restoring Archived Documents

You can restore archived documents to your hard drive.

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

To restore an archived document
1. Click the Administration tab > Archive & Restore > Archive Search.
2. Search for archived documents (see “Searching for Archived Documents” on page 107).
3. Click the Document ID.
The Archive Document Details page opens.

4 Click Export.
   The File Download dialog box opens.

5 Select Save this file to disk.

6 Click OK.
   The Save As dialog box opens.

7 Navigate to the location where you want to save the downloaded file > click Save.
   The archived document is saved on your hard drive.

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

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

Grace Period Example

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

The grace period begins on the 19th until the end of the next calendar month. Inovisworks keeps documents archived before the 18th in the Archive Repository.

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

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

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

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

**To view your customer information**

- Click the Administration tab > Customer.

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

**Editing Customer Information**

**To edit your customer information**

1. Click the Administration tab > Customer.
   
The Customer View window opens.

2. Click Edit Customer.

   The Customer Edit window opens.

   3. Make your changes.

   4. Click Update Customer.
Scheduling Documents

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

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

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

Viewing a Document Scheduler Configuration

To view a document schedule

1. Click the Administration tab > Document Scheduler.

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

2. Select the configuration you want to view > click View.
The Document Scheduler Configuration View page opens.

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

4 Click Back to return the Document Scheduler List page.

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

Adding a Document Scheduler Configuration

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

To add a document scheduler configuration

1 Click the Administration tab > Document Scheduler.

   The Document Scheduler Configuration List page opens.

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

4 Click **Save Configuration** or click **Cancel** to cancel all entries.

Documents are placed on hold based on the information you specify.
Add/Edit Document Scheduler Field Descriptions

<table>
<thead>
<tr>
<th>In this Field...</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Descriptive name for the document scheduler configuration.</td>
</tr>
<tr>
<td>Description</td>
<td>Reason the documents are being scheduled.</td>
</tr>
<tr>
<td>Status</td>
<td>Active or Inactive</td>
</tr>
<tr>
<td>PSN</td>
<td>Account (PSN) for which documents are being scheduled. <strong>Note:</strong> Press the Ctrl key to select more than one account (PSN).</td>
</tr>
</tbody>
</table>
| Date and Time   | Date and Time to begin and end the document schedule. **Range**—Select a Start and End date and time.  
  - **Start**—Select a document schedule starting date from the calendar or type the values directly using the mm/dd/yyyy format.  
  - From the drop-down list, select the scheduled starting time. **Note:** Military time is listed in 15-minute increments with 00:00 representing midnight.  
  - **End**—Select a schedule ending date from the calendar or type the values using the mm/dd/yyyy format.  
  - From the drop-down list, select the scheduled ending time. **Note:** Military time is listed in 15-minute increments with 00:00 representing midnight.  
  - **Recurring**—Select the Start and End day and time for documents to be held and released on a recurring basis, such as every Sunday from 1 a.m. to every Monday at 3 a.m. |
| Time Zone       | Time zone in which the dates and times in the configuration are to take place. |

**Editing a Document Scheduler Configuration**

**To edit a document scheduler configuration**

1. Click the Administration tab > Document Scheduler.  
The Document Scheduler Configuration List page opens.  
2. Select a configuration > Edit.  
4. Click Save Configuration or click Cancel to cancel all edits.

**Deleting a Document Scheduler Configuration**

**To delete a document scheduler configuration**

1. From the Administration tab > Document Scheduler.  
The Document Scheduler Configuration List page opens.  
2. Select the configuration you want to delete > click Delete.  
   A page that shows the document scheduler configuration opens.
3 Review the document scheduler configuration carefully before deleting it.

![Scheduler Configuration Example](image)

4 Click Delete Configuration.

**Viewing Audit History for Document Scheduler Configurations**

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

**To view the audit history for scheduled documents**

1 Click the Administration tab > Document Scheduler.

The Document Scheduler Configuration List page opens.

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

The Document Scheduler Configuration page opens.

3 Scroll to the bottom of the page.

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

<table>
<thead>
<tr>
<th>Event</th>
<th>Date/Time</th>
<th>User</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modified</td>
<td>01/12/2009 09:08:41</td>
<td>icrumadm</td>
<td>[Name: Test This account][Description: Magic/ZZ hold][Active: false][Times: Immediately][Target Idc: 412904862]</td>
</tr>
<tr>
<td>Modified</td>
<td>01/12/2009 09:08:41</td>
<td>icrumadm</td>
<td>[Name: Test This account][Description: Magic/ZZ hold][Active: true][Times: Immediately][Target Idc: 412904862]</td>
</tr>
<tr>
<td>Created</td>
<td>09/27/2000 10:56:20</td>
<td>rmkradm</td>
<td>[Name: Test This account][Description: Magic/ZZ hold][Active: true][Times: Immediately][Target Idc: 412904862]</td>
</tr>
</tbody>
</table>
Maintaining Event Notification

An event is any action performed on a document as it travels through the GXS network. Event notification configurations ensure emails are sent to you and/or your trading partners when documents do not process successfully. After receiving the emails, you or your trading partners can take corrective action.

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

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

About Event Notification

These topics are critical to understanding event notification:

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

Events, Event Types, and Event Groups

An event is any action performed on a document as it travels through the GXS network. An event type is a specific event, such as an invalid receiver.
An event group is a set of related events, such as document errors. Many event types can exist within an event group. For example, the data validation event group includes these event types:

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

### Sample Emails

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

**From:** ces@inovis.com (mailto: ces@inovis.com)
**To:** John Smith
**Subject:** Invalid Receiver

To our valued customer,

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

- If you are a sending customer, please submit a request online at www.inovisworks.net to have your Trading ID added to the Inovis Network. Please provide the Company Name, Trading ID, and Network.
- If you are a sending MAV, please contact Inovis Customer Support by phone as 1-977-466-5997 option 1, 2, 4, or by email and provide Company Name, Trading ID, and Network.
- If you are a receiving customer, please edit your Trading ID to your account to log a case online through www.inovisworks.net and send the document.

**Document Information:**

**Session ID:** [3.192322243]
**Document:** ABC123456
**Error Code:** XX0005050

**Recommended actions to resolve the error:**

Type of error, such as invalid receiver

Recommended actions to resolve the error

Document-specific information

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

**From:** alphabetesi@pc2.com (mailto:alphabetesi@pc2.com)
**To:** Lyle Cram
**Subject:** TLM_TIMEOUT WARNINGCUSTOMER

TLM Warning Timeout: TLM associated transaction not received for the following transactions:

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>24530126</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>24530909</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Recommended actions to resolve the error:**

Type of error

Recommended actions to resolve the error

Document-specific information

Link to unsubscribe from event notification

This message is intended for the addressee(s) only and may contain confidential and/or proprietary information. If you are receiving this email because your email address was provided as a recipient for emails sent for notified events could unsubscribe from event notification (see FAQs). If you wish to no longer receive email related to this message, please unsubscribe from the list. If you have any questions or concerns, please contact Inovis Customer Support.
The bottom of each email contains a link that allows customers to unsubscribe from event notification (see “Unsubscribing from Event Notification for an Event Group” on page 134). Instead of using the standard GXS emails, customer can define special text for the emails they send (see “Modifying Email Messages for Event Notification” on page 129).

**Email Frequency**

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

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

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

**Example of Event Notification Processing**

This example describes how Inovisworks processes event notification configurations.

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

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

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

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

**SAMPLE PROCESSING**

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

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

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

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

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

**Setup Process for FA Reconciliation**

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

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

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

**DEFINE EVENT NOTIFICATION SETTINGS FOR FA MONITOR CONFIGURATIONS**

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

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

**DEFINE TRADING PARTNER ADDRESS BOOKS FOR FA**

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

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

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

<table>
<thead>
<tr>
<th>When these options are selected in an FA monitor configuration...</th>
<th>Use this FA event group when defining email addresses in event notification configurations...</th>
<th>Emails can be sent to...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Timeout Type Settings</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Warning</td>
<td>Ack Warning Timeout for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td></td>
<td>Ack Warning Timeout for Org Doc Receiver</td>
<td>Receiver</td>
</tr>
<tr>
<td>Violation</td>
<td>Ack Violation Timeout for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td></td>
<td>Ack Violation Timeout for Org Doc Receiver</td>
<td>Receiver</td>
</tr>
<tr>
<td><strong>Event Notification Settings</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notify if Accepted</td>
<td>Ack Accepted for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td>Notify if Not Matched</td>
<td>Ack Not Matched for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td></td>
<td>Ack Not Matched for Org Doc Receiver</td>
<td>Receiver</td>
</tr>
<tr>
<td>Notify if Rejected</td>
<td>Ack Reject for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td>Notify if Other Errors</td>
<td>Other Ack Error for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td></td>
<td>Other Ack Error for Org Doc Receiver</td>
<td>Receiver</td>
</tr>
</tbody>
</table>

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

Setting Up Document or Archive Event Notifications

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

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

Adding a Document or Archive Event Notification

Event notification configurations can apply to

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

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

To set up a document or archive event notification configuration

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

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

2. In Notification Status, indicate the status of the notification, Active or Inactive.

3. In Configuration Name, type a name for the notification.

4. Select Account PSNs, Trading IDs, and Group IDs to which the configuration is to apply (see “Add/Edit Document/Archive Notification Field Descriptions” on page 124).

5. Click the appropriate Add button to move the selected items to the target boxes.

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

6. Scroll to Document/Archive Notifications and select the event groups to which the customer wants to apply to the notification.

Note: When exceptions occur, email notifications will be sent for all event types within the selected event groups.
7 In Email Addresses, type up to five email addresses to which email notifications are to be sent. In Language, select the language that is to be used in the email. Distribution lists can be used as email addresses (see “Defining Distribution Lists” on page 133).

![Email addresses and email language information.

8 In Notification Frequency in Minutes, type the frequency with which the emails are to be sent when errors occur.

9 If you do not want to send the standard GXS email, go to step 3 in “Modifying Email Messages for Event Notification” on page 129.

10 Click Add Notification.

The document/archive event notification configuration is added for the selected customer or account (PSN).
Add/Edit Document/Archive Notification Field Descriptions

<table>
<thead>
<tr>
<th>Section/Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Notification Status</td>
<td>Status of the event notification configuration, Active or Inactive.</td>
</tr>
<tr>
<td>*Name for Configuration</td>
<td>Descriptive name of the event notification configuration.</td>
</tr>
<tr>
<td>Account PSNs</td>
<td>Accounts (PSNs) to which the event notification configuration applies.</td>
</tr>
<tr>
<td></td>
<td><strong>To indicate an account (PSN) is to be included:</strong></td>
</tr>
<tr>
<td></td>
<td>1 In the source box, select the account (PSNs) that are to be included.</td>
</tr>
<tr>
<td></td>
<td>2 Click <strong>Add Account PSNs</strong>.</td>
</tr>
<tr>
<td></td>
<td>The selected account (PSNs) are moved to the target list box.</td>
</tr>
<tr>
<td>Trading IDs</td>
<td>Trading IDs to which the event notification configuration applies.</td>
</tr>
<tr>
<td></td>
<td><strong>To indicate a trading ID is to be included:</strong></td>
</tr>
<tr>
<td></td>
<td>3 In the source box, select the trading IDs that are to be included.</td>
</tr>
<tr>
<td></td>
<td>4 Click <strong>Add Trading IDs</strong>.</td>
</tr>
<tr>
<td></td>
<td>The selected trading IDs are moved to the target list box.</td>
</tr>
<tr>
<td>Group IDs</td>
<td>Group IDs, which are based on trading ID, to which the event notification configuration applies.</td>
</tr>
<tr>
<td></td>
<td><strong>To indicate a group ID is to be included:</strong></td>
</tr>
<tr>
<td></td>
<td>5 In the source box, select the group IDs that are to be included.</td>
</tr>
<tr>
<td></td>
<td>6 Click <strong>Add Group IDs</strong>.</td>
</tr>
<tr>
<td></td>
<td>The selected group IDs are moved to the target list box.</td>
</tr>
<tr>
<td>*Document/Archive Notifications</td>
<td>Document and archive events to which the event notification configuration applies, including:</td>
</tr>
<tr>
<td></td>
<td>• Data validation errors</td>
</tr>
<tr>
<td></td>
<td>• Archive status updates and changes</td>
</tr>
<tr>
<td>*Email Addresses</td>
<td>Up to five email addresses to which email notifications will be sent if the conditions specified in the configuration are met.</td>
</tr>
<tr>
<td>Language</td>
<td>Language, such as English or Chinese, that is to be used when the email is sent to the email address.</td>
</tr>
<tr>
<td>*Notification Frequency in Minutes</td>
<td>Amount of time, in minutes, after which Inovisworks will send email notifications to the addresses specified in “*Email Addresses”</td>
</tr>
<tr>
<td></td>
<td>Maximum: 9999 minutes (166.65 hours)</td>
</tr>
<tr>
<td>Email Formatting</td>
<td>Optional. If no selections are made, emails will be sent in the standard GXS email format for document and archive events.</td>
</tr>
<tr>
<td>Subject Line</td>
<td>• Use Default Subject—To use the standard GXS subject line for document or archive events.</td>
</tr>
<tr>
<td></td>
<td>• Use Custom Subject—To use a customer-defined subject line for document or archive events.</td>
</tr>
<tr>
<td></td>
<td>In the text box, type the subject line.</td>
</tr>
</tbody>
</table>
ADMINISTRATION TAB

Maintaining Event Notification

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

To edit an event notification configuration
1. Click the Administration tab > Event Notification > Configure Event Notifications.
2. Select the notification > click Edit.
3. Modify the information as appropriate (see “Add/Edit Document/Archive Notification Field Descriptions” on page 124).
4. Click Update Notification.
   The event notification configuration is updated for the selected customer or account (PSN).

Viewing Event Notification Configurations

To view an event notification configuration
1. Click the Administration tab > Event Notification > Configure Event Notifications.
2. Select the notification > click View.
3. Click the list breadcrumb to return to the Event Notification List page.

Deleting Event Notification Configurations

To delete an event notification configuration
1. Click the Administration tab > Event Notification > Configure Event Notifications.
2. Select the notification > click Delete > OK.
   The event notification configuration is deleted for the selected customer or account (PSN).

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

FA events are related to warning and violation timeouts.

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

To set up an FA event notification configuration

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

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

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

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

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

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

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

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

6 In Notification Frequency in Minutes, type the frequency with which emails are to be sent when errors occur.

7 If customers do not want to send the standard GXS email, go to step 3 in “Modifying Email Messages for Event Notification” on page 129.

8 Click Add Notification.

   The TLM/FA event notification configuration is added for the selected customer or account (PSN).
## Add/Edit FA Notification Field Descriptions

<table>
<thead>
<tr>
<th>Section/Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Notification Status</td>
<td>Status of the event notification configuration, Active or Inactive.</td>
</tr>
<tr>
<td>*Name for configuration</td>
<td>Descriptive name of the event notification configuration.</td>
</tr>
<tr>
<td>Account PSNs</td>
<td>Accounts (PSNs) to which the event notification configuration applies.</td>
</tr>
<tr>
<td></td>
<td><strong>To indicate an account (PSN) is to be included:</strong></td>
</tr>
<tr>
<td></td>
<td>1 In the source box, select the account (PSNs) that are to be included.</td>
</tr>
<tr>
<td></td>
<td>2 Click Add Account PSNs. The selected account (PSNs) are moved to the target list box.</td>
</tr>
<tr>
<td>Trading IDs</td>
<td>Trading IDs to which the event notification configuration applies.</td>
</tr>
<tr>
<td></td>
<td><strong>To indicate a trading ID is to be included:</strong></td>
</tr>
<tr>
<td></td>
<td>3 In the source box, select the trading IDs that are to be included.</td>
</tr>
<tr>
<td></td>
<td>4 Click Add Trading IDs. The selected trading IDs are moved to the target list box.</td>
</tr>
<tr>
<td>Group IDs</td>
<td>Group IDs, which are based on trading ID, to which the event notification configuration applies.</td>
</tr>
<tr>
<td></td>
<td><strong>To indicate a group ID is to be included:</strong></td>
</tr>
<tr>
<td></td>
<td>5 In the source box, select the group IDs that are to be included.</td>
</tr>
<tr>
<td></td>
<td>6 Click Add Group IDs. The selected group IDs are moved to the target list box.</td>
</tr>
<tr>
<td>Document Type</td>
<td>Document types to which the event notification configuration applies.</td>
</tr>
<tr>
<td>*Email Addresses</td>
<td>Up to five email addresses to which email notifications will be sent if the conditions specified in the configuration are met.</td>
</tr>
<tr>
<td>Language</td>
<td>Language, such as English or Chinese, that is to be used when the email is sent to the email address.</td>
</tr>
<tr>
<td>*Notification Frequency in Minutes</td>
<td>Amount of time, in minutes, after which Inovisworks will send email notifications to the addresses specified in “Email Addresses.”</td>
</tr>
<tr>
<td></td>
<td>Maximum: 9999 minutes (166.65 hours)</td>
</tr>
<tr>
<td>Email Formatting</td>
<td>Optional. If no selections are made, emails will be sent in the standard GXS email format for FA events.</td>
</tr>
<tr>
<td>Subject Line</td>
<td>■ Use Default Subject—To use the standard GXS subject line for FA events.</td>
</tr>
<tr>
<td></td>
<td>■ Use Custom Subject—To use a customer-defined subject line for FA events. In the text box, type the subject line.</td>
</tr>
<tr>
<td>Instructions Line</td>
<td>■ Yes—To use instruction/solution text that describes how the customer wants to resolve FA errors. In the text box, type the instructions.</td>
</tr>
<tr>
<td></td>
<td>■ No—To not include instruction/resolution text in the email.</td>
</tr>
</tbody>
</table>
Modifying Email Messages for Event Notification

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

To modify the default email messages

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

1 Click the Administration tab > Event Notification > Configure Event Notifications > Add Document/Archive Configuration or Add TLM/FA Notification.

2 Select the notification > click Edit.
3 Scroll to email Formatting at the bottom of the page.

If you want to use specialized text in emails:

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

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

4 Select the appropriate option and type custom information for the message’s subject, instruction/solution, and signature lines (see “Email Formatting” on page 128). If no information is provided, the default GXS email messages are sent to you and/or your trading partners.

5 For FA notifications, indicate if all information about a document is to display in the email, or if only limited information is to display.

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

<table>
<thead>
<tr>
<th>All Document Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Originating account</td>
<td>Interchange control number</td>
</tr>
<tr>
<td>FA monitor name</td>
<td>Document ID</td>
</tr>
<tr>
<td>Originating application assigned number</td>
<td>EDI trading ID</td>
</tr>
<tr>
<td>Sender</td>
<td>Originating control number</td>
</tr>
<tr>
<td>Receiver</td>
<td>Monitor ID</td>
</tr>
<tr>
<td>Name of receiver’s account</td>
<td></td>
</tr>
<tr>
<td>Reconciliation timeout</td>
<td></td>
</tr>
</tbody>
</table>

6 For FA notifications, select the email option that describes how you want Inovisworks to send email notifications when errors occur.

7 Click Update Notification.

Note: The contents of selected email are changed.

Setting Up Trading Partner Address Books
If you subscribe to FA, you can define address books for groups of trading partners.
Inovisworks uses the address books as a source of email addresses when determining which email addresses to use when sending email notifications.

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

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

**Adding Trading Partner Address Books**

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

**To add trading partner address books for FA customers**

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

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

   The Address Book List page opens.

2. Click **Add**.

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

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

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

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

The trading IDs for interchange level trading partners are listed in the source box.
5 In the source box, select the Trading IDs you want to include in the address book.
6 Click the appropriate Add button to move the selected items to the target boxes.
7 In Email Addresses, type up to five email addresses to include in the address book.
8 Click Add.

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

Add/Edit Address Book Field Descriptions

<table>
<thead>
<tr>
<th>Section/Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Book Entry Information</td>
<td></td>
</tr>
<tr>
<td>▲Address Book Name</td>
<td>Name of the address book for the trading partner.</td>
</tr>
<tr>
<td>▲Description</td>
<td>Descriptive information about the address book.</td>
</tr>
<tr>
<td>Primary Contact Information</td>
<td></td>
</tr>
<tr>
<td>▲First Name</td>
<td>First name of the trading partner’s contact person.</td>
</tr>
<tr>
<td>▲Last Name</td>
<td>Last name of the trading partner’s contact person.</td>
</tr>
<tr>
<td>▲Phone Number</td>
<td>Telephone number of the trading partner’s contact person.</td>
</tr>
<tr>
<td>Trading Partner Information</td>
<td></td>
</tr>
<tr>
<td>▲Trading ID</td>
<td>Trading IDs for interchange level trading partners.</td>
</tr>
<tr>
<td>To search for trading IDs:</td>
<td></td>
</tr>
<tr>
<td>1 Type all or part of a trading ID.</td>
<td></td>
</tr>
<tr>
<td>2 Click Search.</td>
<td></td>
</tr>
<tr>
<td>The trading IDs for interchange level trading partners are listed in the selection list.</td>
<td></td>
</tr>
<tr>
<td>Note: You can use an asterisk (*) as a wild card. For example, typing “<em>acme</em>” and clicking Search would give you a list of all trading IDs with “acme” in the name</td>
<td></td>
</tr>
<tr>
<td>▲Trading ID List</td>
<td>Trading IDs for interchange level trading partners that can be added to the configuration.</td>
</tr>
<tr>
<td>To associate trading IDs with the address book:</td>
<td></td>
</tr>
<tr>
<td>3 Select one or more trading IDs.</td>
<td></td>
</tr>
<tr>
<td>4 Click Add Trading ID.</td>
<td></td>
</tr>
<tr>
<td>The selected trading IDs are moved from the selection list to the target list.</td>
<td></td>
</tr>
<tr>
<td>To remove trading IDs from the address book:</td>
<td></td>
</tr>
<tr>
<td>5 Select one or more trading IDs from the target list.</td>
<td></td>
</tr>
<tr>
<td>6 Click Remove Trading ID.</td>
<td></td>
</tr>
<tr>
<td>The selected trading IDs are moved from the target list to the selection list.</td>
<td></td>
</tr>
<tr>
<td>Email Addresses</td>
<td></td>
</tr>
<tr>
<td>▲Email Address 1—5</td>
<td>Type up to five email addresses for the trading partner.</td>
</tr>
</tbody>
</table>

Editing Trading Partner Address Books

To edit a trading partner address book
1 Click the Administration tab > Event Notification > Manage Trading Partner Addresses.
2 Select the address book > click Edit.
3 Modify the information as appropriate (see “Add/Edit Address Book Field Descriptions” on page 132).

4 Click Edit > OK.

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

**Viewing Trading Partner Address Books**

**To view a trading partner address book**

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

2 Select the address book > click View.

3 Click the list breadcrumb to return to the Event Notification List page.

**Deleting Trading Partner Address Books**

**To delete a trading partner address book**

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

2 Select the address book > click Delete > OK.

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

**Defining Distribution Lists**

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

Distribution lists offer these advantages:

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

**To define distribution lists**

Depending on your company policy, either:

- Create a distribution list using your email program.
- Contact your email administrator to request a distribution list be created.

**Note:** If the email address of a distribution list unsubscribes from event notification, all addresses on the distribution list will no longer be notified of events.

**Disabling Event Notification Configurations**

**To disable an event notification configuration**

1 Click the Administration tab > Event Notification > Configure Event Notifications.

2 Select the notification > click Edit.

3 In Notification Status, change the status to Inactive.

4 Click Edit Notification.

   The event notification configuration is updated.
Unsubscribing from Event Notification for an Event Group

To unsubscribe from event notification for an event group

1. From an email received from GXS, go to the bottom of the email and click the link.
   
   ![Email Unsubscribe Link]
   
   Click link to stop receiving emails for an event group.

2. Type the email address to remove > click **Unsubscribe**.

   ![Email Unsubscribe Form]
   
   Please type the e-mail address to remove:

   [Unsubscribe]

   **Note:** If the email address of a distribution list unsubscribes from event notification, all addresses on the distribution list will no longer be notified of events.

3. A confirmation message displays. You will:
   - Receive a confirmation email stating you have been unsubscribed from event notification.
   - Stop receiving event notification emails for the event group.

Changing Your Password

To change your password

1. Click the **Administration** tab > **Password**.
   
   The change password page opens.

2. Click **Change Password**.

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Type or select...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Password</td>
<td>Your current password.</td>
</tr>
</tbody>
</table>
3 Click **Change Password**.
A message lets you know your password is changed.

4 Click **Continue** and the main Change Password page opens.

### Maintaining Trading Partners

When you exchange documents with trading partners on Inovisworks, Inovisworks automatically creates a relationship between your trading ID/qualifier and your trading partner’s trading ID/qualifier.

If you want to exchange documents with trading partners that use a different value added network (VAN), use Inovisworks to create the relationship between your trading ID/qualifier and a trading partner’s ID/qualifier.

- “Registering and Adding a Trading Partner” on page 135
- “Requesting GXS Set Up a Trading Relationship” on page 138
- “Viewing a Trading Partner Relationship” on page 138
- “Deleting a Trading Partner Relationship” on page 138

### Registering and Adding a Trading Partner

If your trading partners use another VAN, their trading IDs/qualifiers might not exist on Inovisworks. To create the relationship between your trading ID/qualifier and your partner’s trading ID/qualifier, you must register the trading partner on Inovisworks.

**Important:** Before you begin this procedure, be sure you know the name of the network used by your trading partner.

**To register a trading partner on Inovisworks**

1. Select a single account (PSN).
2. Click the **Administration** tab > **Trading Partner**.
The Trading Partner List page shows all trading partners for the selected account (PSN).

3 Click **Add**.

The Trading Partner Search page opens. Use this page to determine if your trading partner’s information is already registered on Inovisworks.

4 Type your trading partner’s trading ID and qualifier (optional) > click **Search**.

**Important:** You must type the trading ID exactly as it appears in Inovisworks. Inovisworks searches for the trading ID/qualifier.
5 Perform the appropriate action:

<table>
<thead>
<tr>
<th>If the search was...</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Successful  (You see a table that lists trading IDs matching your search criteria.)</td>
<td>6 In the Partner Trading ID/Partner Qualifier column, select the Trading ID/Qualifier.</td>
</tr>
</tbody>
</table>

6 In the Partner Trading ID/Partner Qualifier column, select the Trading ID/Qualifier.

7 Go to step 12.

<table>
<thead>
<tr>
<th>Unsuccessful (You see the “This Trading Partner does not exist in Inovisworks” message.)</th>
<th>8 Click Register This Trading Partner.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This Trading Partner does not exist in Inovisworks.</td>
</tr>
<tr>
<td></td>
<td>Trading ID/Qualifiers: 33456777V</td>
</tr>
<tr>
<td></td>
<td>Search Again</td>
</tr>
<tr>
<td></td>
<td>9 Go to step 10.</td>
</tr>
</tbody>
</table>

8 Click Register This Trading Partner.

9 Go to step 10.

10 Type the company name and select the network used by the trading partner from the drop-down list > click Continue.

The Trading Partner Registration Confirmation page displays the information you just entered.

11 Click Register.

The Trading Partner Relationship page opens.
In the drop-down list, select the trading ID/qualifier for your company that is to be linked to your trading partner’s ID/qualifier. Click Add Trading Partner.

A message indicates the trading partner was added successfully.

Click Done.

The trading partner relationship is added to the Trading Partner List page.

You will receive a confirmation email that reminds you to work with your trading partner to ensure your trading IDs/qualifiers are linked on the trading partner’s network.

**Requesting GXS Set Up a Trading Relationship**

If you register the maximum allowable number of trading partners in a day by following the steps in “Registering and Adding a Trading Partner,” you can:

- Wait until the next day to add more trading relationships.
- Call the GXS Solution Center at +1 877.446.6847 and request additional trading relationships be added.

**Viewing a Trading Partner Relationship**

Trading partners are viewed primarily for information verification.

**To view a trading partner**

1. Select a single account (PSN).
2. Click the Administration tab > Trading Partner.
   The Trading Partner List page opens.
3. Select the trading partner relationship > click View.
   The selected Trading Partner’s general and contact information opens.
4. Click the list breadcrumb to return to the Trading Partner List page.

**Deleting a Trading Partner Relationship**

When you delete a trading partner, you delete the relationship between your company’s trading ID/qualifier and the trading partner’s trading ID/qualifier.

**Note:** To re-establish the relationship, just send a document to the trading partner. Inovisworks automatically recreates the trading partner relationship.

**To delete a trading partner relationship**

1. Select a single account (PSN).
2 Click the Administration tab > Trading Partner.
The Trading Partner list page opens.

3 Select the trading partner relationship for deletion > click Delete.
The Trading Partner’s profile is opened.

4 Confirm the deletion > click Delete Trading Partner Relationship.
A message confirms that the trading partner relationship has been deleted.

5 On the Confirmation page, click Done to return to the Trading Partner List page.

Maintaining User Information
To add or maintain a user profile, you must sign on with a Customer Admin role.

- “Adding a User” on page 139
- “Editing a User Profile” on page 140
- “Deleting a User” on page 141

Adding a User

To add a user
1 Sign on with a profile that has a Customer Admin role.

2 Click the Administration tab > User.
A list of users opens.

3 Click Add.

4 Type or select the needed Information:

<table>
<thead>
<tr>
<th>In this field:</th>
<th>Type or Select...</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Login ID</td>
<td>The user’s login ID</td>
</tr>
<tr>
<td>*Password</td>
<td>A temporary password for the user.</td>
</tr>
<tr>
<td></td>
<td>The user is prompted to change this when she or he opens Inovisworks.</td>
</tr>
<tr>
<td>*Confirm Password</td>
<td>A temporary password for the user.</td>
</tr>
<tr>
<td>Password Rule</td>
<td>The rule you need to set for this password.</td>
</tr>
<tr>
<td></td>
<td>Example: Maximum length, maximum attempts, etc.</td>
</tr>
<tr>
<td>Time Zone</td>
<td>The time zone for the user.</td>
</tr>
<tr>
<td>*Role</td>
<td>Select one of the following:</td>
</tr>
<tr>
<td></td>
<td>- Customer Admin</td>
</tr>
<tr>
<td></td>
<td>- Customer User</td>
</tr>
<tr>
<td></td>
<td>- Account Admin</td>
</tr>
<tr>
<td></td>
<td>- Account User</td>
</tr>
<tr>
<td></td>
<td>For a description of each role, see “Roles and Functions” on page 19.</td>
</tr>
<tr>
<td>*Account (PSN)</td>
<td>Any Accounts (PSNs) assigned to this user.</td>
</tr>
<tr>
<td></td>
<td>Click the selection box beside each account you need.</td>
</tr>
</tbody>
</table>
5 Type or select the contact information for the user.
   First Name, Last Name, and Email Address are required.

6 Click Add User.
   A message confirms the user is added to the account(s).

7 On the Confirmation page, click Done and the list of users, including the one just added, is shown on the Administration tab.

**Viewing a User**

**To view a user**
1 Sign on with a profile that has a Customer Admin role.
2 Click the Administration tab > User.
   A list of users opens.
3 Select a user > click View.
   User and Contact information opens.
   **Note:** Click Edit if you want to edit any of the information (see “Editing a User Profile” on page 140).

**Editing a User Profile**

**To edit a user profile**
1 Sign on with a profile that has a Customer Admin role.
2 Click the Administration tab > User.
   A list of users opens.
3 Select the user whose information you want to change > click Edit.
4 Make changes to the user and contact information.
   **Note:** You cannot change a user’s password.
5 Click Update User.
   A message lets you know the user information is updated.
6 On the Confirmation page, click Done and the list of users opens.
Deleting a User

The Customer Admin whose name is listed on the account’s primary mailbox cannot be deleted.

To delete a user

1. Sign on with a profile that has a Customer Admin role.
2. Click the Administration tab > User.
   The list of users opens.
3. Select the user you want > click Delete.
   The user profile contact information displays, including Login ID, Role, First Name, and Last Name.
4. Verify the information > click Delete User.
   A message lets you know the user information has been deleted.
5. Click Done and the Administration tab opens listing the remaining users.
Managed Services customers who subscribe to the cross-reference premium service can use Inovisworks to update data in cross-reference tables. The tables, which identify fields with specific values in EDI documents, are used to replace and validate information in documents during transformation. The tables are comma-delimited files.

The following topics describe how to update data in the cross-reference tables and troubleshoot processing errors that occur as a result of changes to the tables.

- “About Cross-Reference Tables” on page 143
- “Viewing the Layout of a Cross-Reference Table” on page 144
- “Working with Data in a Cross-Reference Table” on page 145
- “Troubleshooting Errors in Cross-Reference Tables” on page 148
- “Reprocessing Managed Services Documents” on page 150
- “Granting User Access to Cross-Reference Table Errors” on page 150

### About Cross-Reference Tables

Cross-reference tables consist of two parts:

- **Layout**—Applies to the table as a whole, and includes the name and number of columns in the table. While Managed Services customers with the appropriate permissions can view table layouts, GXS staff maintain them (see “Viewing a Cross-Reference Table Layout” on page 144).

- **Data**—Information contained in the rows in a table (see “Working with Data in a Cross-Reference Table” on page 145).
The buttons at the bottom of the View Table Definitions page let you view a table layout. They also let you view or edit the data in a table, export the table data to a spreadsheet program, and update the table so it is available for processing.

Click **View/Edit Data** to view or edit the data in a table.

**To view a table layout**

1. Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

   A list of cross-reference tables opens.

2. Select the table layout you want to view > click **View**.

The View Table Definition page opens.

3. Click **Cancel** to return to the list page.

**Viewing a Cross-Reference Table Layout**

Use this procedure to view the layout of a cross-reference table. GXS staff maintain the tables for Managed Services customers.
Working with Data in a Cross-Reference Table

The data in a cross-reference table can be modified at any time. Individuals with the Customer Admin and Customer User roles can view and edit the data.

- “Viewing Data in a Cross-Reference Table” on page 145
- “Adding Data to a Cross-Reference Table” on page 146
- “Updating Data in a Cross-Reference Table” on page 146
- “Editing Data in a Cross-Reference Table” on page 147
- “Searching for Data in a Cross-Reference Table” on page 147
- “Deleting Data from a Cross-Reference Table” on page 148
- “Exporting Data in a Cross-Reference Table” on page 148

Viewing Data in a Cross-Reference Table

To view data in a cross-reference table

1. Click the Premium Services tab > Cross-Reference > Managed Services Cross-Reference Tables.

   A list of cross-reference tables opens.

2. Select the table that contains the data you want to view > click View/Edit Data.

   The page that opens shows information about the data in the table.

3. Perform the appropriate action:

<table>
<thead>
<tr>
<th>If you want to...</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Return to the Table List page.</td>
<td>Click the View Tables Definition breadcrumb.</td>
</tr>
<tr>
<td>Add data to the table</td>
<td>4 Click Add. 5 Go to step 3 in “Adding Data to a Cross-Reference Table” on page 146.</td>
</tr>
<tr>
<td>Edit data in the table</td>
<td>6 Select the row that contains the data you want to change &gt; click Edit. 7 Modify the information &gt; click Save.</td>
</tr>
<tr>
<td>Delete data from the table</td>
<td>Select the row of data you want to delete &gt; click Delete.</td>
</tr>
</tbody>
</table>
Adding Data to a Cross-Reference Table

To add data to a cross-reference table
1. Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

   A list of cross-reference tables opens.

2. Select the table that contains the data you want to view > click **View/Edit Data**.

   The page that opens shows information about the data in the table.

3. To add information to a row in the table, click **Add**.

   The columns in the table display so you can add data to the row in the table.

4. Type the information > click **Add**.

   The data is added to the last row in the table.

Updating Data in a Cross-Reference Table

After modifying data in a cross-reference table, you must update the table so Managed Services will use the new or updated information during processing.

Data can be updated from the table list page or from within the table.

To update data in a cross-reference table
1. Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

   A list of cross-reference tables opens.
2 Select the table you want to make available to Managed Services for processing.

3 Perform the appropriate action:

<table>
<thead>
<tr>
<th>If you want to...</th>
<th>Do this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update the data in the table</td>
<td>1 Click <strong>Update XRef Table</strong>.</td>
</tr>
<tr>
<td>Review the data before updating it</td>
<td>4 Click <strong>View/Edit Data</strong>.</td>
</tr>
<tr>
<td></td>
<td>5 Review the data.</td>
</tr>
<tr>
<td></td>
<td>6 Click <strong>Update XRef Table</strong>.</td>
</tr>
</tbody>
</table>

A message asks if you want to overwrite the data in the existing cross-reference table.

7 Click **OK** to overwrite the data in the table.

A message indicates the table has been updated successfully.

**Editing Data in a Cross-Reference Table**

**To edit data in a cross-reference table**

1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

2 Select the table that contains the data you want to view > click **View/Edit Data**.

The page that opens shows information about the data in the table.

3 Select the row of data you want to modify > click **Edit**.

The data in the row displays.

4 Modify the information > click **Save**.

The data is modified in the table.

**Searching for Data in a Cross-Reference Table**

If a column in a cross-reference table has been defined as searchable, you can perform a keyword search for data in the column.

**Note:** Wildcards (*) are supported.

**To search for data in a cross-reference table**

1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

2 Select the table that contains the data you want to view > click **View/Edit Data**.

Any columns that were defined as searchable display at the top of the page. Below the searchable columns, all data in the table displays.
3 In the search area for the column name, type the word you want to find.

**Important:** Wildcards (*) are supported.

![Table Name: REF Table 1
Last Updated By: rmikradin
Last Updated Time: 07/07/2008 11:12:00
Dept
*search for approval
Search](image)

To find data called "Key" in the column, type "Key".

4 Click **Search**.

The table rows that contain columns with the data you searched for display.

You can add or modify information in the table.

### Deleting Data from a Cross-Reference Table

**To delete data from a cross-reference table**

1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

2 Select the table that contains the data you want to delete > click **View/Edit Data**.

The page that opens shows information about the data in the table.

3 Select the row you want to delete > click **Delete**.

A confirmation message asks if you want to delete the data in the table.

4 If you want to delete the data, click **OK**.

The data is deleted from the table.

### Exporting Data in a Cross-Reference Table

Use this procedure to export data in a cross-reference table to a spreadsheet program.

**To export data in a cross-reference table**

1 Click the **Premium Services** tab > **Cross-Reference** > **Managed Services Cross-Reference Tables**.

A list of cross-reference tables opens.

2 Select the table that contains the data you want to export > click **Export Data**.

The File Download dialog box opens.

3 Select **Save**.

4 Navigate to the directory or folder to download the file.

5 Click **Save**.

### Troubleshooting Errors in Cross-Reference Tables

Managed Services uses maps to transform documents. It also uses maps to access cross-reference tables. Processing errors might occur while Managed Services uses a map to:

- Transform a document from one format to another, or
Access data in cross-reference tables.

Use this procedure to find and resolve errors generated when Managed Services accesses data in cross-reference tables.

**Note:** To reprocess documents after correcting errors in cross-reference tables, see “Reprocessing Managed Services Documents” on page 150.

**To resolve errors in a cross-reference table**

1. Click the **Premium Services** tab > click **Cross-Reference** > **Managed Services Cross-Reference Errors**.

   A list of errors related to cross-reference tables opens.

2. To see information about the cross-reference table that contains the error, click the link under Document Type.

   A list of document errors opens. As shown in the screen capture, information about one error is contained in three rows in the table.

3. Based on the error (rows 2 and 3), click the table link (row 1) to go to the table with the error.

4. Modify the information in the table to resolve the error > click **Save**.

   **Note:** For more information about adding, editing, and deleting data in tables, see “Working with Data in a Cross-Reference Table” on page 145.

5. Perform the appropriate action:

<table>
<thead>
<tr>
<th>If you want to...</th>
<th>Do this?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reprocess the document that caused the error</td>
<td><em>Go to step 2 in “Reprocessing Managed Services Documents” on page 150.</em></td>
</tr>
<tr>
<td>View the content of the document on TLE</td>
<td><em>Click View Document.</em></td>
</tr>
</tbody>
</table>
Reprocessing Managed Services Documents

After updating a cross-reference table, you can reprocess documents (flat files) that run against maps in Managed Services. The maps access the cross-reference tables when a document is transformed.

**To reprocess documents that use a cross-reference table**

1. Click the **Premium Services** tab > click **Cross-Reference** > **Managed Services Cross-Reference Errors**.
   
   A list of errors related to cross-reference tables opens.

2. After you update a cross-reference table that contains errors, select the table from the list > click **Reprocess**.
   
   The status of the document changes to Pending Reprocess.

3. Click **Refresh** to refresh the list of errors.
   
   After reprocessing is complete, the error no longer appears on the list.

---

Granting User Access to Cross-Reference Table Errors

If you are a Customer Admin, you can grant user access rights to cross-reference table errors by trading partner. The access means users will only be able to see cross-reference errors related to the trading partners assigned to them.

**To grant access to cross-reference table errors by trading partner**

1. Sign on with a profile that has a Customer Admin role.

2. Click the **Administration** tab > **User**.
   
   A list of users opens.

3. Select the user that you want to grant access to cross-reference tables by trading partner > click **Edit**.

4. In Make Cross-Reference Tables Editable, indicate if you want the user to be able to edit information in cross-reference tables.
5 In Filter Sender TP Cross-Reference Errors or Filter Receiver TP Cross-Reference Errors, select the trading partners to assign to the user.

6 Click **Update User** to save your changes.

   A message lets you know the user information was updated.

7 On the Confirmation page, click **Done** and the list of users opens.
The Support tab gives you access to the Customer Portal Home Page where you can log and track service requests.

- “Viewing the Support Tab” on page 153
- “Viewing the Customer Portal Home Page” on page 153

Viewing the Support Tab

Also use the Support tab to:

- View GXS Contact Information
- View messages

Viewing the Customer Portal Home Page

See your company’s portal administrator to get your login ID and password. The portal administrator manages accounts and users for your company.
To view the Customer Portal Home Page

1. From the Support tab, click the link.

   The Customer Portal page opens.

2. Type your login ID and password > click OK.

   **Note:** Passwords are case sensitive.
The GXS Customer Portal page opens.
File Transfer Protocol (FTP)

The FTP file transfer protocol is used to transfer files to and from Inovisworks.

- “FTP Home Directory” on page 157
- “Standard FTP Commands” on page 158
- “FTP Site Commands for Inovisworks” on page 158
- “Tovan folders” on page 159
- “Sending FTP Files” on page 160
- “Fromvan folders” on page 160
- “Receiving FTP files” on page 161
- “Receiving FTP Files Using the Original Filename” on page 161
- “Document Filename Format” on page 162
- “Custom Filenames” on page 162
- “Reports Folder” on page 162
- “Report Filename Format” on page 162
- “Avoiding FTP Time-Outs” on page 162
- “Finding a Session ID” on page 163

FTP Home Directory

The FTP home directory has three primary folders.

- **tovan**—used to send/put/push files to Inovisworks (see “Tovan folders” on page 159).
- **fromvan**—used to retrieve/get/pull files from your mailbox folders (see “Fromvan folders” on page 160).
- **reports**—used to retrieve/get/pull FTP On-Demand and Recurring reports (see “Reports Folder” on page 162).
Standard FTP Commands

Standard FTP commands are used to send, receive, and list documents.

<table>
<thead>
<tr>
<th>Use this command</th>
<th>To...</th>
</tr>
</thead>
<tbody>
<tr>
<td>ls</td>
<td>Create a list of files in the current directory.</td>
</tr>
<tr>
<td>dir</td>
<td>Create a list of files in the current directory.</td>
</tr>
<tr>
<td>cd</td>
<td>Change directories.</td>
</tr>
<tr>
<td>put, mput, or append</td>
<td>Send files.</td>
</tr>
<tr>
<td>get or mget</td>
<td>Retrieve documents.</td>
</tr>
<tr>
<td>pwd</td>
<td>Print the current directory.</td>
</tr>
<tr>
<td>type</td>
<td>List the transfer mode, ASCII or binary (bin).</td>
</tr>
<tr>
<td>pasv</td>
<td>Set the FTP gateway to passive mode.</td>
</tr>
</tbody>
</table>

FTP Site Commands for Inovisworks

Use these custom commands with Inovisworks:

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

<table>
<thead>
<tr>
<th>Use this command</th>
<th>To...</th>
</tr>
</thead>
<tbody>
<tr>
<td>site docid</td>
<td>Set the filename mode to <strong>document ID.type</strong> for the current session. Default. See “Receiving FTP Files Using the Original Filename” on page 161.</td>
</tr>
<tr>
<td>site filename</td>
<td>Set the filename mode to <strong>original filename</strong> for the current session. If several files have the same original filename, a suffix will be appended incrementally. <strong>Example:</strong> <em>wsr_po.xml, wsr_po.xml.1, and wsr_po.xml.2</em> See “Receiving FTP Files Using the Original Filename” on page 161.</td>
</tr>
<tr>
<td>site filename nosuffix</td>
<td>Set the filename mode to <strong>original filename</strong> for the current session. If several files have the same original filename, the original filename will be repeated. The oldest filename is retrieved first. See “Receiving FTP Files Using the Original Filename” on page 161.</td>
</tr>
</tbody>
</table>
| site discard_empty_files | Ignore empty (0 length) files for the current session; do not issue parse errors.  
  ■ Default—Process empty files and issue parse errors.  
  **To return to default behavior:**  
  ■ Type **site discard_empty_files off** |
| site sessionID       | Returns the FTP session ID.  
  **Note:** The session ID automatically displays at the beginning of a session.  
  See “Finding a Session ID” on page 163. |
| site sync            | Put the current FTP session in synchronous mode. Files are parsed before sending an acknowledgement. Default.  
  See “Avoiding FTP Time-Outs” on page 162. |
Tovan folders

The tovan folder is used to store EDI data files ready to send to a Trading Partner via Inovisworks.
Sending FTP Files

To send/put FTP files

1. Connect to your FTP server.
2. From the FTP directory, select the FTP tovan folder.
3. Open the correct FTP file folder. For example: bin, edi, or xml.
4. Change to the <receiver> directory.
   
   **Note:** For EDI and XML files that include a receiver Trading ID and Qualifier, you do no need to change to the <receiver> directory. For example, if you have changed to the tovan/edi directory, type:

   ```
   ftp>put 15334433.edi
   ```

5. On the command line, type `put` and the name of the file you want to send in this format:

   ```
   ftp>put <filename>
   ```

   **Examples:**

   ```
   ftp>put 15334432.bin
   ftp>put 15334432.edi
   ftp>put 15334432.xml
   ```

   FTP brings the file into your tovan folder and sends it to your Trading Partner.

Fromvan folders

The fromvan folder is used to store EDI transactions ready to be retrieved.
FTP fromvan folders are created by GXS within Inovisworks based on your File Type or Trading Partner.

<table>
<thead>
<tr>
<th>From this folder:</th>
<th>Retrieve files based on...</th>
</tr>
</thead>
<tbody>
<tr>
<td>fromvan/doc_&lt;type&gt;</td>
<td>Document Type:</td>
</tr>
<tr>
<td></td>
<td>▪ Purchase Order (PO)</td>
</tr>
<tr>
<td></td>
<td>▪ Invoice (IN)</td>
</tr>
<tr>
<td></td>
<td>▪ EDIFACT (orders)</td>
</tr>
<tr>
<td></td>
<td>▪ Shipment and Billing notice (BS)</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> fromvan/doc_orders</td>
</tr>
<tr>
<td>fromvan/&lt;partner&gt;</td>
<td>▪ Trading Partner’s Account Number (PSN)</td>
</tr>
<tr>
<td></td>
<td>▪ Trading ID</td>
</tr>
<tr>
<td></td>
<td>▪ Trading ID.Qualifier</td>
</tr>
<tr>
<td></td>
<td><strong>Example:</strong> fromvan/301505931</td>
</tr>
</tbody>
</table>

**Receiving FTP files**

**To receive FTP files**
1. Connect to your FTP server.
2. From the FTP directory, select the FTP fromvan folder.
3. Select the correct FTP folder.
   **Example:** fromvan, fromvan/doc_<type>, or fromvan/<partner>
4. Type `get <filename>` or `mget <pattern>`.
   **Example:** `mget *.edi`

The FTP server delivers your document to your hard drive where it is stored and processed.

**Receiving FTP Files Using the Original Filename**

Use site commands to retrieve files using the original filename.

**To receive FTP files using the original filename**
1. Connect to your FTP server.
2. From the FTP directory, select the FTP fromvan folder.
3. Select the FTP file type folder you need.
   **Example:** fromvan, fromvan/doc_<type>, or fromvan/<partner>
4. Perform the appropriate action:

<table>
<thead>
<tr>
<th>If you want to...</th>
<th>Type...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a suffix to duplicate filenames</td>
<td><code>site filename</code></td>
</tr>
<tr>
<td>Repeat any duplicate filenames</td>
<td><code>site filename nosuffix</code></td>
</tr>
</tbody>
</table>

**Note:** Some FTP clients might not directly support SITE commands, which means you might need to use a QUOTE or LITERAL command when sending SITE commands. Consult your FTP client documentation.
The filename mode changes from documentID.type to original filename mode.

5 Type `get <filename>` or `mget <pattern>`.

Example: `mget *.edi`

The FTP server delivers your document to your hard drive where it is stored and processed.

**Document Filename Format**

Document filenames are in this format: `document ID.<format>`

**EXAMPLE**

15334432.edi

You can also retrieve files from a trading partner using the original filename (see “Receiving FTP Files Using the Original Filename” on page 161).

**Custom Filenames**

If you want to use unique filenames to retrieve groups of documents as single files by document type or trading partner, call the GXS Solution Center at +1 877.446.6847 and request custom filenames be setup for your account. For example:

- `fromvan/purchase_file`
- `fromvan/acmecorpfiles`

**Reports Folder**

Use the `reports` folder to retrieve/get/pull FTP On-Demand and Recurring reports created using FTP commands (see “Retrieving Files from the FTP Reports Directory” on page 85).

**Report Filename Format**

Report filenames are in this format:

```
<reportid>.rpt
```

The report ID is a unique number assigned to each report.

**Avoiding FTP Time-Outs**

If you experience FTP time-outs when processing larger files, change session processing from synchronous (default) to asynchronous. Inovisworks processes files larger than the default (500 KB) asynchronously. It processes files smaller than the default synchronously.
To change session processing

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

<table>
<thead>
<tr>
<th>If you want to put the current session in ...</th>
<th>Type...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Synchronous mode (default)</td>
<td>site sync</td>
</tr>
<tr>
<td>Asynchronous mode</td>
<td>site async &lt;size&gt;</td>
</tr>
</tbody>
</table>

<size> = numeric value that indicates files larger than the threshold will be processed asynchronously.

Examples: site async
or
site async 50000

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

The processing for the current session changes.

Finding a Session ID

The FTP session ID automatically displays at the beginning of a session.

To find a session ID after the session ID no longer displays

- At the FTP command line, type:

  site sessionID

The session ID is returned; for example, **200 Session ID is 9952**.
FILE TRANSFER PROTOCOL (FTP)
Finding a Session ID
Data Syntax Error Messages

Data syntax errors are caused by documents that do not meet EDI standards. In general, the errors are relatively easy to resolve.

Inovisworks generates data syntax error messages during the parsing process. The parser analyzes documents to ensure they meet EDI standards. Use the information in this topic to identify and resolve data syntax errors.

X12 and EDIFACT Messages:

- “BAD_IC_CONTROL_INVALID” on page 166
- “BAD_IC_CONTROL_MISMATCH” on page 166
- “BAD_IC_CONTROL_NUMBER_MISSING” on page 166
- “BAD_IC_DOC_COUNT” on page 166
- “BAD_IC_GROUP_COUNT” on page 167
- “BAD_IC_INCOMPLETE” on page 167
- “BAD_IC_INVALID_SEPARATOR_IGNORAND” on page 167
- “BAD_IC_INVALID_SEPARATOR_WRONG_DEFAULTS” on page 167
- “BAD_IC_INVALID_SEPARATORS_IDENTICAL” on page 168
- “BAD_IC_MIXED_GROUP_DOC” on page 168
- “BAD_IC_SEG_COUNT” on page 168
- “BAD_IC_UNEXPECTED_CHARACTERS” on page 169
- “BAD_IC_UNEXPECTED_DOC” on page 169
- “BAD_IC_UNEXPECTED_OBJECT” on page 169
- “BAD_IC_UNEXPECTED_SEGMENT” on page 169
- “BAD_XML_INCOMPLETE” on page 170
- “BAD_XML_INCOMPLETE_FAILURE” on page 170
- “UNRECOGNIZABLE_EDI” on page 170

TRADACOMS Messages:

- “BAD_IC_EXTRA_RECON_MESSAGE_FOUND” on page 170
- “BAD_IC_HEADER_INVALID_ELEMENT” on page 171
- “BAD_IC_HEADER_INVALID_ELEMENT_CODE” on page 171
- “BAD_IC_HEADER_MISSING_ELEMENT” on page 171
- “BAD_IC_HEADER_MISSED_ELEMENT” on page 171
DATA SYNTAX ERROR MESSAGES
BAD_IC_CONTROL_INVALID

- “BAD_IC_HEADER_TOO_MANYELEMENTS” on page 171
- “BAD_IC_INVALID_RECON_MESSAGE_EXTRA SEG” on page 171
- “BAD_IC_INVALID_RECON_MESSAGESEG_MISSING” on page 172
- “BAD_IC_MISSING_RECON_MESSAGE” on page 172
- “BAD_IC_RECEIVER_ID_MISMATCH” on page 172
- “BAD_IC_RECON_MESSAGE_NOT_LAST” on page 172
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BAD_IC_CONTROL_INVALID

Probable Cause
The control number value in an interchange header is inconsistent with the element’s defined data type. The error is usually caused by non-numeric data in a control number value defined as numeric.

Solution
Be sure the interchange control number is numeric.

BAD_IC_CONTROL_MISMATCH

Probable Cause
The interchange header and trailer segment control numbers do not match.

Solution
Be sure the interchange header and trailer segment control numbers have the same value.

BAD_IC_CONTROL_NUMBER_MISSING

Probable Cause
There is no interchange control number in the interchange header or trailer segment.

Solution
Add the interchange control number to the interchange header or trailer segment.

BAD_IC_DOC_COUNT

Probable Cause
The interchange trailer segment has a document count element value that does not agree with the number of documents counted by the parser.

Solution
Be sure the interchange trailer segment’s document count element value matches the number of documents in the interchange. The number of documents in the interchange is based on the number of document header segments, such as ST, UNH, or MHD.
BAD_IC_GROUP_COUNT

Probable Cause
The interchange trailer segment has a group count element value that does not agree with the number of groups counted by the parser.

Solution
Be sure the interchange trailer segment's group count element value matches the number of groups in the interchange. The number of groups in the interchange is based on the number of group header segments, such as GS or UNG.

BAD_IC_INCOMPLETE

Probable Cause
An interchange trailer segment was not identified before the end of the data stream. All data from the identified interchange header to the end of the file was treated as part of the interchange.

Solution
Be sure all interchanges are enclosed between a header segment and a trailer segment.

BAD_IC_INVALID_SEPARATOR_IGNORED

Probable Cause
An invalid character was used to define a separator. This error occurs if a number or letter is used to define the component element separator in the ISA segment of an X12 interchange.

Note: Using letters or numbers as separators increases the likelihood of erroneous parsing and reduces the usable characters for data element values.

Solution
Do not use letters or numbers as separators.

BAD_IC_INVALID_SEPARATOR_WRONG_DEFAULTS

Probable Cause
The wrong set of separator characters is being used in an EDIFACT-based interchange. Depending on character set and syntax version, EDIFACT defines three sets of default separator characters. This message indicates the separators are not appropriate, but are identified as one of the other default sets.

Solution
Add a preceding UNA segment to identify the separators being used.

Note: UNA can be used to set any characters as separators.
BAD_IC_INVALID_SEPARATORS_IDENTICAL

Probable Cause
Two types of separator characters were defined using the same symbol.

Solution
For EDI data to be accurately parsed, all separator characters must be unique.
For X12 interchanges, the separator characters also must not be used in the data elements. There is no way to identify a separator character as being part of the data if it is used within a data element value.
For EDIFACT interchanges, you can define a unique release character that can be used to precede and “deactivate” a separator character so it can be included in the data portion of an element.

BAD_IC_MIXED_GROUP_DOC

Probable Cause
Functional groups and stand-alone documents exist within the same interchange.
- X12—Does not allow stand-alone documents.
- EDIFACT—Allows stand-alone documents or functional groups, but both cannot be in the same interchange.

Solution
- For X12—Be sure all documents within the interchange are enclosed within the appropriate functional groups.
- For EDIFACT—Be sure all documents are standalone by either:
  - Eliminating functional group structures (the more common approach)
  - OR
  - Ensuring documents are fully contained in the appropriate functional groups

BAD_IC_SEG_COUNT

Probable Cause
According to the standard's counting rules, the interchange trailer segment has a segment count element value that does not agree with the number of segments counted by the parser.

Solution
Be sure the interchange trailer segment’s segment count element value matches the number of segments in the interchange.
BAD_IC_UNEXPECTED_CHARACTERS

Probable Cause
The parser found unexpected data within identified segments in an EDI interchange. In most cases the cause is white space. The cause could be other characters that are inappropriate for starting a segment tag.

In most EDI standards, syntax rules do not permit surplus bytes between the terminator character of a segment and the tag of the next. This includes—but is not limited to—CR\LF sequences following defined segment terminators.

Solution
Eliminate excess characters between segments.

BAD_IC_UNEXPECTED_DOC

Probable Cause
The parser found a document outside the scope of a functional group. This can happen if:

- Any ST segment was encountered outside the bounds of a GS/GE construct
- OR
- An EDIFACT interchange contained a UNG/UNE construct and was followed by stand-alone documents

Solution
Be sure the syntax is correct in the document.

BAD_IC_UNEXPECTED_OBJECT

Probable Cause
When the EDIFACT syntax level specified in the UNB is less than 4, this error indicates the presence of syntax-level 4 associated objects enclosed in UNO and UNP segments. These associated objects are not valid before syntax level 4.

Solution
Remove the associated binary object.

BAD_IC_UNEXPECTED_SEGMENT

Probable Cause
The parser found a segment in an interchange that was placed outside the range of a document.

Solution
Be sure all document data is enclosed in a header segment (such as ST or UNH) and a document trailer (such as SE or UNT).
BAD_XML_INCOMPLETE

Probable Cause
An XML document was identified, but there was no closing root tag to match the opening tag.

Solution
According to XML syntax rules, each XML document should be opened with a root tag, such as `<root>`, and closed with a corresponding closing tag, such as `</root>`.

BAD_XML_INCOMPLETE_FAILURE

Probable Cause
An XML document was identified, but there was no closing root tag to match the opening tag. Similar to the “BAD_XML_INCOMPLETE” error, this error suggests there was a system problem while processing the data, such as a read failed or another problem.

Solution
Contact the GXS Solution Center at +1 877.446.6847.

UNRECOGNIZABLEEDI

Probable Cause
Inovisworks received a file that was not formatted using standard EDI structure or the file contained zero bytes.

Solution
Be sure the file is formatted using standard EDI structure (for example, ISA, GS, ST, SE, GE, and IEA) before sending it to Inovisworks. The data must contain standard segments and elements to be processed by Inovisworks.

If the file contains zero bytes, eliminate zero byte files from your sessions.

BAD_IC_EXTRA_RECON_MESSAGE_FOUND

Probable Cause
The parser found more than one reconciliation message in the interchange.

In TRADACOMS, when a reconciliation message is required (STX01:1=ANAA), one RSGRSG message must appear as the last message in the interchange. More than one RSGRSG message was found.

Solution
Eliminate the extra RSGRSG message(s).
BAD_IC_HEADER_INVALID_ELEMENT

Probable Cause
The parser found an element in the interchange header segment that did not fit the defined size. The element value might be too long or too short based on the standard definition for the element.

Solution
Correct the element value to conform to the size limitations.

BAD_IC_HEADER_INVALID_ELEMENT_CODE

Probable Cause
The parser found an element value in the interchange header segment that was not valid based on the standard-defined code list for the element.

Solution
Correct the element value by changing it to a valid code value.

BAD_IC_HEADER_MISSING_ELEMENT

Probable Cause
The parser found an interchange header segment that was missing one or more mandatory elements.

Solution
Correct the interchange header by ensuring all mandatory elements are present.

BAD_IC_HEADER_TOO_MANY_ELEMENTS

Probable Cause
The parser found an interchange header segment that contains elements beyond the last defined position.

Solution
Remove the excess elements from the end of the interchange header segment.

BAD_IC_INVALID_RECON_MESSAGE_EXTRA_SEG

Probable Cause
The parser found an invalid reconciliation message. In TRADACOMS, the RSGRSG reconciliation message is made up of three segments: one MHD (message header), one RSG (reconciliation information segment), and one MTR (message trailer). The there was another segment found in the RSGRSG message (might be an additional RSG segment or some other segment).
BAD_IC_INVALID_RECON_MESSAGE_SEG_MISSING

Probable Cause
The parser found an invalid reconciliation message.

In TRADACOMS, the RSGRSG reconciliation message is made up of three segments: MHD (message header), RSG (reconciliation information segment), and MTR (message trailer). The RSG segment was not found.

Solution
Correct the RSGRSG message by inserting the RSG segment between MHD and MTR.

BAD_IC_MISSING_RECON_MESSAGE

Probable Cause
Coding in the interchange header indicated a reconciliation message was required, but the parser did not find a reconciliation message.

In TRADACOMS, the STX01:1 element can contain either ANA or ANAA. If ANAA, an RSGRSG reconciliation message must appear as the last message in the interchange. The STX01:1 contained ANAA.

Solution
Either change the STX01:1 element to contain ANA or add an RSGRSG message from the interchange to the end of the interchange.

BAD_IC_RECEIVER_ID_MISMATCH

Probable Cause
The parser found a mismatch between the receiver ID in the interchange header segment and the receiver ID in the reconciliation message.

In TRADACOMS, the reconciliation message (RSGRSG) is used to confirm the receiver ID and the interchange control number. The receiver ID found in the RSG segment did not match the receiver code value (STX03:1).

Solution
Correct the receiver ID in the reconciliation message or change the receiver ID in the interchange header segment.

BAD_IC_RECON_MESSAGE_NOT_LAST

Probable Cause
The parser found a message after the reconciliation message in the interchange.
In TRADACOMS, when a reconciliation message is required (STX01:1=ANAA), one RSGRSG message must appear as the last message in the interchange. The parser found one or more messages in the interchange appearing after the RSGRSG.

**Solution**

Eliminate the messages that follow the RSGRSG message or move the RSGRSG message so it appears at the end of the interchange.

**BAD_IC_UNEXPECTED_RECON_MESSAGE**

**Probable Cause**

Coding in the interchange header indicated a reconciliation message was not expected, yet the parser found a reconciliation message.

In TRADACOMS, the STX01:1 element can contain either ANA or ANAA. If ANAA, an RSGRSG reconciliation message must appear as the last message in the interchange. The STX01:1 did not contain ANAA.

**Solution**

Either change the STX01:1 element to contain ANAA or remove the RSGRSG message from the interchange.
DATA SYNTAX ERROR MESSAGES
BAD_IC_UNEXPECTED_RECON_MESSAGE
Frequently Asked Questions

Whatever tab you are viewing when you click FAQ Help, you open the questions and answers for that particular tab. To see other FAQs without selecting the tab, select Frequently Asked Questions in the Help files.

- “Home Tab” on page 175
- “Document Tracking Tab” on page 177
- “Reports Tab” on page 179
- “Administration Tab” on page 180
- “Premium Services Tab” on page 182
- “Support Tab” on page 182

Home Tab

- “Why doesn’t my page show some of the functions described?”
- “Can I find out to which services I already subscribe?”
- “Is it possible to see more Transaction Summary information?”
- “How do I update my profile?”
- “What are Breadcrumbs?”

Why doesn’t my page show some of the functions described?
This information is for all Inovisworks customers. What you see is based on your Login ID and password; consequently, there might be times when you cannot perform the tasks listed or see all of the fields described.

How do I use the Account Selection Area at the top of the page?
Use the Search by Account Selection area on the top right of each Inovisworks page for general document searches. When selecting accounts to view, you are selecting the
mailboxes to be searched when you perform a document search, or want to view a transaction summary.

Can I find out to which services I already subscribe?
Yes. When the Home tab opens, on the right side of the page is the heading My Services, where all current services are listed. You can also add an on-line enabled service here.

Is it possible to see more Transaction Summary information?
Yes, you can click a color-coded area in the graph to go to the Document List page for all documents represented by the color; for example, all purchase orders.

The color-coded status graph shows the status and number of transactions.

<table>
<thead>
<tr>
<th>If you:</th>
<th>You see...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Move your cursor over a color-coded area</td>
<td>Summary information about the documents represented by that color.</td>
</tr>
<tr>
<td>Click a colored-coded area in the graph.</td>
<td>The Document List page opens, listing all documents represented by the selected color in the column (see “Using the Document List” on page 49).</td>
</tr>
</tbody>
</table>
FREQUENTLY ASKED QUESTIONS
Document Tracking Tab

How do I update my profile?

To update your profile
1 Click Home tab > My Profile.
    Your user profile displays.
2 Type or select your changes.
3 Click Update Profile to return the updated Profile page.

What are Breadcrumbs?
Breadcrumbs are links showing you where you are in the application and either how you got there, or Inovisworks’s recommended route.

[Diagram of Breadcrumbs]

Document Tracking Tab

- “How do I find documents?”
- “What’s the difference between Inbound and Outbound documents?”
- “What’s the Document Detail Page?”
- “Knowing When to Resend or Reprocess Documents?”
- “How can I find what caused my document to fail?”
- “What if I’ve sent a document but don’t want it picked up?”
- “Can I download documents onto my hard drive?”

How do I find documents?
From the Document Tracking tab, use a Basic, Advanced, or Quick search to find documents.
- “Using the Basic Search Option” on page 38
- “Using the Advanced Search Option” on page 39
- “Using the Quick Search” on page 42

What’s the difference between Inbound and Outbound documents?
- Inbound documents—are documents received by your company from a Trading Partner.
- Outbound documents—are documents sent from your company to a Trading Partner.

What’s the Document Detail Page?
The Document Detail page shows detail for a specific document.
FREQUENTLY ASKED QUESTIONS
Document Tracking Tab

To view document details
1. Click the Document Tracking tab.
2. Search for documents using the Basic, Advanced, or the Quick Search. For information about document searches, see “Searching for Documents” on page 37.
3. From the Document List page, click the Document ID for which you need the detail. See “Viewing Document Details” on page 52.

Knowing When to Resend or Reprocess Documents?
If a document fails to reach your trading partner, you must:

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

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

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

How can I find what caused my document to fail?

To find document errors
1. Click the Document Tracking tab. The Basic Search page opens.
2. Search for documents using the Basic, Advanced, or the Quick Search. For information about document searches, see “Searching for Documents” on page 37.
3. From the Status list, select All Errors.
4. Type all needed information. For field definitions, see “Basic Search Field Definitions” on page 39 or “Advanced Search Field Definitions” on page 41.

The Document List page lists all error documents, with the error description listed in the Status column. The Document ID, Doc Type, Sender, Receiver, Process Time, and ICN are also shown. For more information about the Document List page, see “Using the Document List” on page 49.
5 Click the **Document ID** of the document you need.

The Document Detail page opens graphically displaying the errors. For more information, see “Viewing Document Details” on page 52.

**What if I’ve sent a document but don’t want it picked up?**
If the document you sent still has an Available status you can put a Hold status on the document.

**To put a document on hold**
1 Click the **Document Tracking** tab.
2 Find the document using the Quick, Basic, or Advanced Search option.
3 Click the **Document ID** of the document you want.
   The View Detail page opens.
4 Click **Hold**.
   A message requests status confirmation.
5 Click **Continue**.
   A check mark under the Result field indicates the document was placed on hold.

**Can I download documents onto my hard drive?**
Yes. If you want to view the entire content of an error status document, for example, that is larger than 32K and therefore not entirely visible on page, use the export option to download the file to your hard drive.

**To export a document to your hard drive**
1 Click the **Document Tracking** tab.
2 Find the document using the Quick, Basic, or Advanced Search option.
3 Click the Document ID of the document you want.
   The View Detail page opens.
4 Click **Export**.
   The File Download dialog box opens.
5 Select **Save this file to disk**, and click **OK**.
   The **Save As** dialog box opens.
6 Verify or type the name of the document you want to save.
7 Navigate to the hard drive directory you need and click **Save**.

**Reports Tab**
- “What reports are available?”
- “How do I view Reports?”
- “What is meant by Document Count on my Billing Usage Report?”
- “What is meant by Character Count on my Billing Usage Report?”
- “What are Peak Usage Hours?”
FREQUENTLY ASKED QUESTIONS
Administration Tab

What reports are available?
Inovisworks generates these standard reports:

- **Billing Usage Report**—network activity for a specific day, month, or year based on document and character counts (see “Billing Usage Report” on page 76).
- **Document Summary Report**—document totals for a defined time period (see “Viewing a Document Summary Report” on page 78).
- **Payer Beneficiary Report**—based on the customer ID of the payer, lists the payer’s beneficiaries (see “Payer Beneficiary Reports” on page 90).
- **Trading Partner Report**—lists Trading Partners (see “Viewing a Trading Partner Report” on page 98).

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

- **FTP Interactive Audit Report**—provides synchronous audit feedback during (or after) an FTP session (see “FTP Interactive Audit Report” on page 79).
- **FTP On-Demand Report**—lists document totals for a defined time period (see “FTP On-Demand Report” on page 84).
- **Recurring Report**—regular report that lists documents processed in time period (see “Recurring Reports” on page 92).

How do I view Reports?

- “Viewing a Billing Usage Report” on page 76
- “Viewing a Document Summary Report” on page 78
- “Viewing the Payer Beneficiary List Report” on page 90
- “Viewing Recurring Reports in Document Tracking” on page 96
- “Viewing a Trading Partner Report” on page 98

What is meant by Document Count on my Billing Usage Report?

**Document Count** is the number of documents sent through the network during peak and off-peak hours (see “Billing Usage Report Description” on page 77).

What is meant by Character Count on my Billing Usage Report?

Character Count is the number of characters (document size) sent through the network during peak and off-peak hours.

What are Peak Usage Hours?

Monday through Friday, 6 a.m.—8 p.m. Eastern Standard Time.

Administration Tab

- “How do I add a Trading Partner?”
- “How can I find Trading a Partner Contact?”
- “How does my role relate to the functions I perform?”
How do I add a Trading Partner?

When you need to add a Trading Partner:

- Use Inovisworks to add a Trading Partner to an existing account (see “Adding an Account (Service) to an Existing Profile” on page 102).
- Send GXS a Trading Partner setup request when no account exists for the company on Inovisworks (see ”Requesting GXS Set Up a Trading Relationship” on page 138).

How can I find Trading a Partner Contact?

Your Trading Partner contact is listed in the Trading Partner profile.

To find trading partner contact information

1. Click the Administration tab > Trading Partner.
2. Select a Trading Partner > click View.

The Trading Partner’s profile information page opens displaying your Trading Partner’s company and contact information.

How does my role relate to the functions I perform?

Customer and user maintenance functions (tasks) are defined by a customer’s role. Your Inovisworks login ID defines your assigned Inovisworks role, and your role defines the functions (tasks) and pages you can view within Inovisworks.

- **Roles**—define a group of functions/tasks assigned to a login ID.
  - **Customer Admin**—has access to all user, trading partner, account, and document information.
  - **Customer User**—tasks are confined to those accounts for which he or she is responsible.
  - **Account Admin**—use this role for limiting administrative access to information for a specific account (PSN).
  - **Account User**—use this role for limiting user access for a specific account (PSN).

- **Functions**—actions a user can perform within Inovisworks. A user’s role defines which functions the user can perform.

The following table provides a high level overview of functions assigned to specific roles. Roles can have administrative access—full access (A), limited access (L), or view only (V).

<table>
<thead>
<tr>
<th>Function</th>
<th>Customer Admin</th>
<th>Customer User</th>
<th>Account Admin</th>
<th>Account User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>A</td>
<td>L</td>
<td>L</td>
<td>L</td>
</tr>
<tr>
<td>Document Tracking</td>
<td>A</td>
<td>L</td>
<td>L</td>
<td>L</td>
</tr>
<tr>
<td>Reports</td>
<td>L</td>
<td>L</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accounts</td>
<td>L</td>
<td>L</td>
<td>L</td>
<td>V</td>
</tr>
<tr>
<td>Acknowledgement Reconciliation</td>
<td>L</td>
<td>V</td>
<td>V</td>
<td>V</td>
</tr>
<tr>
<td>Archive &amp; Restore</td>
<td>A</td>
<td>V</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Customer</td>
<td>A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Document Scheduler</td>
<td>A</td>
<td>V</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Password</td>
<td>A</td>
<td>A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rules</td>
<td>A</td>
<td>A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FREQUENTLY ASKED QUESTIONS

Premium Services Tab

“Do all users see the Premium Services tab?”

Do all users see the Premium Services tab?
Yes. All users can click the Premium Services tab and access the Visibility link, which provides access to marketing information. If you are associated with a company that subscribes to the cross-reference premium service, you can click the tab to access a link to the cross-reference tables.

Support Tab

- “How do I contact Customer Support?”
- “Can I see a list of all current messages?”

How do I contact Customer Support?
Customer Support email address and telephone phone numbers can be found from the Home tab or Support tab.

To contact GXS Customer Support
From either the Home tab or the Support tab, click Contact Us.

- Primary point of contact for support:
  You can log a problem ticket and document your comments.

- Telephone support:
  - In North America, call +1 877.446.6847
  - In Europe, call +44 (0)1483 569388
  - For International support outside EMEA, call +1 404.467.3806

Can I see a list of all current messages?

To view current messages
From either the Home tab or the Support tab, click All messages.

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

- To view the full text of a single message: Click the message.
- To view all current messages: Click View All Messages, or from the navigation panel, click Messages.

<table>
<thead>
<tr>
<th>Function</th>
<th>Customer Admin</th>
<th>Customer User</th>
<th>Account Admin</th>
<th>Account User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trading Partner</td>
<td>A</td>
<td>V</td>
<td>L</td>
<td>V</td>
</tr>
<tr>
<td>User (External)</td>
<td>A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support</td>
<td>A</td>
<td>A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Functional acknowledgement (FA) reconciliation is a premium service from GXS. You must subscribe to the service to perform the tasks in this topic.

FA Reconciliation is the process of verifying that original documents your company sends were received by your trading partners. When your company does not receive acknowledgements in a timely manner, Inovisworks notifies your trading partners automatically, allowing your company to better manage its business.

- “About FA Reconciliation” on page 183
- “Stages in FA Reconciliation Set up Process” on page 188
  - “Stage 1—Setting up FA Reconciliation Settings for Original Documents” on page 188
  - “Stage 2—Setting up Email Addresses in Event Notification Configurations” on page 197
  - “Set Up Process Complete” on page 198
- “Filtering Existing FA Reconciliation Settings” on page 198
- “Editing FA Reconciliation Settings for Original Documents” on page 199
- “Viewing FA Reconciliation Settings for Original Documents” on page 200
- “Deleting FA Reconciliation Settings for Original Documents” on page 200

About FA Reconciliation

Functional acknowledgements (FAs) are standard EDI documents. For the X12 standard, FAs are 997s; for the EDIFACT standard, FAs are CONTRL.

When your company sends EDI documents to your trading partners, your trading partners can respond by sending acknowledgements back you. Acknowledgements report the receipt of the original document by your trading partners and the results of a syntactical analysis of the original document.

- “Inbound and Outbound Documents” on page 184
Inbound and Outbound Documents

In the context of Inovisworks, outbound documents are those sent by your company to a trading partner. Inbound documents are those sent by your trading partners to your mailbox on Inovisworks.

FA reconciliation settings are based on original documents you send to your trading partners. Because original documents are sent from your mailbox on Inovisworks, Inovisworks considers them to be outbound documents.

FA Reconciliation Definition

FA Reconciliation is the process of verifying documents were received by your trading partners. When you send an original document and do not receive acknowledgements in a timely manner, Inovisworks notifies you automatically, allowing your company to better manage its business.

Original Documents and Return Documents

An original document is an EDI document, such as a purchase order, invoice, or ship notice. Your company sends original documents to your trading partners. Your company expects to receive return documents, such as FAs, from trading partners to confirm the trading partner received the original documents.
If your company subscribes to the FA reconciliation service, Inovisworks uses information in acknowledgements from your trading partners to reconcile and match them to the original documents you send.

Timeouts

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

Example Timeout Situation

If an acceptable amount of time to receive acknowledgements “runs out,” a timeout situation exists. Your company has set up FA reconciliation settings that indicate it wants GXS to send notifications that a:

- Warning timeout has occurred if FAs are not received from trading partners 6 minutes after the time the original document was sent.
Violation timeout has occurred if FAs are not received from trading partners 15 minutes after the time the original document was sent.

**Business Hours**

Business hours specify a company’s active hours of operation. More than one set of business hours can be defined, such as Office Hours or Shipping Hours.

Business hours can be applied to FA reconciliation settings to specify how Inovisworks processes timeout situations. If applied, Inovisworks applies or “counts” timeout periods only during the business hours specified in the configuration.

**Events**

Events are any action performed on a document as it travels through the GXS network. For example, an event can be the reconciliation of a response transaction to an original transaction.

An event can be produced by any activity in Inovisworks. Some events trigger alerts and others do not.

**Alerts**

Alerts use emails to notify your company that acknowledgement timeouts have occurred, such as warning or violation timeouts.

Alerts are based on an original document’s acknowledgement status. For example, your company might want to be notified every time it receives an acknowledgement (acknowledgement status is Received). Or, your company might want to be notified only if it gets acknowledgements for original documents that have been rejected by trading partners (acknowledgement status is Rejected).
Event Notification Configurations

Event notification configurations provide a way for you to be automatically notified of events that are of interest to you, such as document errors or acknowledgement reconciliation events.

You set up the email addresses to which the notifications are to be sent in event notification configurations. The configuration specify email addresses for:

- Your company, which sends original documents and subscribes to FA reconciliation
- Your trading partners from which you expect to receive FAs

See “Setting up Event Notifications for FA Events” on page 125.

Acknowledgement Status for Original Documents

When FAs are not received on time, the timeout settings defined for your company can change the acknowledgement status of original documents. For example, when a timeout occurs, your company might want the original document’s acknowledgement status to be changed from Expected to Warning or Violation.

Use the Document Tracking tab to monitor acknowledgements and actively manage situations where acknowledgements do not reconcile with original documents (see “Example Original Document Acknowledgement Status” on page 187) and “Tracking Functional Acknowledgements” on page 63.

Example Original Document Acknowledgement Status

If a timeout situation exists, your company has set up FA reconciliation settings that request that GXS change the acknowledgement status of the original document (purchase order) to:

- Warning if FAs are not received within 6 minutes.
- Violation if FAs are not received within 15 minutes.

See “Processing Flow and Acknowledgement Status” on page 64.
Stages in FA Reconciliation Set up Process

Your company must follow a two-stage process to setup FA reconciliation settings and have email notifications sent to you and your trading partners. You go to different parts of Inovisworks to complete the tasks in each stage.

<table>
<thead>
<tr>
<th>For this stage...</th>
<th>Go to this part of Inovisworks...</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Stage 1—Setting up FA Reconciliation Settings for Original Documents” on page 188</td>
<td>Administration tab &gt; Ack Reconciliation</td>
</tr>
<tr>
<td>“Stage 2—Setting up Email Addresses in Event Notification Configurations” on page 197</td>
<td>Administration tab &gt; Event Notification &gt; Configure Event Notifications</td>
</tr>
</tbody>
</table>

Stage 1—Setting up FA Reconciliation Settings for Original Documents

The first stage of the acknowledgement reconciliation setup process is to set up FA reconciliation settings for original documents. The settings define how your company wants to reconcile acknowledgements in response to original documents. One account (PSN) can have many FA reconciliation settings.

The FA reconciliation set up process in Inovisworks consists of a series of pages. Use the:

- First page—“To define general settings for the original document”
- Second page—“To define settings based on document standard (X12 or EDIFACT)”
- Third page—“To define business hours, and timeout and event notification settings”

To define general settings for the original document

1 Select the account (PSN) that subscribes to FA reconciliation.
2 Click the Administration tab > Acknowledgement Reconciliation > Add.
   The FA Reconciliation Add page opens
3 Activate and name the configuration; for example, 850s for Acme Corporation.

4 In Original Document Settings, define the document standard, transaction types, and senders and receivers for which acknowledgements are to be reconciled (see “FA Reconciliation Field Descriptions (Page 1 of 3)” on page 193).
   a Standard—Select the document standard to which FA reconciliation settings are to be applied; for example, X12 or EDIFACT.
b Transaction Types—Select the transaction types that are to be reconciled; for example, 850 for a purchase order or 810 for an invoice (see “Transaction Types” on page 194).

<table>
<thead>
<tr>
<th>Transaction Types:</th>
<th>All</th>
<th>Only Selected Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All to perform reconciliation of all outgoing documents (this does not include outgoing acknowledgments). Select Only to perform reconciliation only of outgoing document types selected in the list below.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>824</td>
<td>997</td>
<td>210</td>
</tr>
<tr>
<td>Select one or more predefined transaction types from the list. Enter customer defined transaction types (one per line) in the text box.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Optionally, type transaction types that are unique to your company, one per line, in the text box. Ensure the values in the text box match the values in the documents that are sent.

c Sender ID/Qualifier—For your company, select the sender IDs and qualifiers for which you want to reconcile the transaction types (see “Sender ID/Qualifier” on page 194 and “Customer Defined” on page 194).

<table>
<thead>
<tr>
<th>Sender ID/Qualifier:</th>
<th>All</th>
<th>Only Selected</th>
<th>Exclude Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All to perform reconciliation of outgoing documents for all sender ID/qualifiers. Select Only to perform reconciliation only of outgoing documents where the selected sender ID/qualifier is selected in the list below. Select Exclude Selected to perform reconciliation of outgoing documents for all sender ID/qualifiers except those that are selected.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>412001803</td>
<td>41201802</td>
<td>412001802</td>
<td>Customer Defined:</td>
</tr>
<tr>
<td>Select one or more predefined sender ID/qualifiers from the list. To quickly enter more than one value use the “or” button. Enter values in the text box in the appropriate format.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- All—Reconcile outgoing documents for all sender ID/qualifiers.
- Only Selected—Reconcile outgoing documents only if the sender ID/qualifier is selected.
- Exclude Selected—Reconcile outgoing documents for all sender IDs/qualifiers except those that are selected.

d Receiver ID/Qualifier—For your trading partners, select the receiver IDs and qualifiers for which outgoing documents will be reconciled (see “Receiver ID/Qualifier” on page 194).

<table>
<thead>
<tr>
<th>Receiver ID/Qualifier:</th>
<th>All</th>
<th>Only Selected</th>
<th>Exclude Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All to perform reconciliation of outgoing documents for all receiver ID/qualifiers. Select Only to perform reconciliation only of outgoing documents where the selected receiver ID/qualifier is selected in the list below. Select Exclude Selected to perform reconciliation of outgoing documents for all receiver ID/qualifiers except those that are selected.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter receiver trading ID and qualifier (one per line) in the text box. Valid formats are ID/qualifier or ID.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- All—Reconcile outgoing documents for all receiver ID/qualifiers.
- Only Selected—Reconcile outgoing documents only if the receiver ID/qualifier is selected.
Exclude Selected—Reconcile outgoing documents for all receiver IDs/qualifiers except those that are selected.

5 Click Step 2.
   The settings page opens.

6 Go “To define settings based on document standard (X12 or EDIFACT)” on page 190.

To define settings based on document standard (X12 or EDIFACT)
Begin this procedure after completing step 5 in “To define general settings for the original document” on page 188.

1 In Reconciliation Provider, select Inovisworks.

2 The remaining options on the page depend on the document standard you selected.
   - X12—Go to step 3.
   - EDIFACT—Go to step 5.

3 For the X12 standard, define how your company wants to reconcile FAs to original documents (see “X12 Settings” on page 195).

4 You have completed the settings page for the X12 standard. Go to step 7.
5 For the EDIFACT standard, define how your company wants to reconcile FAs to original documents (see “EDIFACT Settings” on page 195).

- **Validate Message Version**—Indicate if the message version in the acknowledgement should be considered when determining which document is to be reconciled.

- **Reconcile Last Sent Interchange**—Indicate how to handle acknowledgements that match duplicate interchange IDs. Forces reconciliation against the last sent interchange.

  **Note:** If not checked, Inovisworks generates a duplicate interchange error when it finds duplicates.

- **Accept Only EDIFACT Acknowledgement Codes 4, 7, and 8**—
  - If checked, Inovisworks accepts only EDIFACT acknowledgement codes 4, 7, and 8 from element 0083:
    - 4—This level and all lower levels rejected
    - 7—This level and all lower levels acknowledged (if the level is not rejected)
    - 8—Interchange received
  - If not checked, Inovisworks accepts these codes:
    - 1—EDIFACT acknowledgment all good
    - 2—EDIFACT acknowledgment error detected
    - 3—EDIFACT acknowledgment errored at low levels
    - 5—EDIFACT acknowledgment header OK
    - 6—EDIFACT acknowledgment header bad
  - If not checked, all other codes will cause an “illegal status code” error.

6 You have completed the settings page for the EDIFACT standard. Go to step 7.

7 Click Step 3.

   The Timeouts and Alerts page opens.

8 Go “To define business hours, and timeout and event notification settings” on page 191.

**To define business hours, and timeout and event notification settings**

Begin this procedure after completing step 7 in “To define settings based on document standard (X12 or EDIFACT)” on page 190.
In Time Based On, select the business hour configuration you want to use. Inovisworks applies or "counts" timeout periods only during the business hours specified in the configuration.

**Note:** If blank, Inovisworks runs based on a 24 hour clock (that is, seven days a week, 24 hours a day).

In Timeout Settings, select Enabled to activate the first timeout setting (see “FA Reconciliation Field Descriptions (Page 3 of 3)” on page 196).

- **Timeout Type**—Select the status to which you want the original document changed if a timeout occurs.

- **Reference Date**—Select the date to start the timeout period.

- **Original Document Processed Date**—Date Inovisworks processed the original document.

- **Extract Date from Original Document**—Date extracted from the original document. Select the date code field from the drop-down list; for example, 068—Current Schedule Ship.

**Note:** Inovisworks uses the Reference Date and the “Timeout Interval” to calculate the timeout time.

- **Timeout Interval**—Indicate the interval of time, in days and minutes or hours, between the “Reference Date” and when the timeout is to occur.

If an FA is not received within 15 minutes of the original document’s processed date, a timeout situation will exist.
d Select the Before or After options to indicate if the timeout is to occur before or after the Reference Date (for an example, see “Timeout Interval” on page 196).

**Note:** Inovisworks uses the Timeout Interval and the “Reference Date” to calculate the timeout time.

e Send Alert To—Indicate if your company wants an alert to be sent to your company (sender) or to your trading partner (receiver) if a timeout occurs.

f To define Timeouts 2 and 3, repeat step 2.

3 In Event Notification Settings, indicate who should be notified based on the processing of the acknowledgement. For example, if the first checkbox is selected, Inovisworks notifies the sender of the original document (your company) each time an acknowledgement with an Accepted status is received.

<table>
<thead>
<tr>
<th>Notify if Accepted:</th>
<th>Sender of Original Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify if Not Matched:</td>
<td>Sender of Original Document</td>
</tr>
<tr>
<td>Notify if Rejected:</td>
<td>Sender of Original Document</td>
</tr>
<tr>
<td>Notify if Other Error:</td>
<td>Sender of Original Document</td>
</tr>
</tbody>
</table>

**Important:** Email addresses must be defined separately (see “Setting up Email Addresses for FA Event Notifications” on page 198).

4 Click **Complete**.

The page lists the FA reconciliation settings selected for the account (PSN).

5 If necessary, click **Previous** to adjust any settings.

6 When you are satisfied the settings are accurate, click **Complete**.

The FA reconciliation setting is added to the Ack Reconciliation List page.

7 To complete the FA reconciliation set up process, go to “Stage 2—Setting up Email Addresses in Event Notification Configurations” on page 197

**FA Reconciliation Field Descriptions (Page 1 of 3)**

These fields display on the first FA Reconciliation page.

<table>
<thead>
<tr>
<th>Section/Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Settings</td>
<td></td>
</tr>
<tr>
<td>Active Status</td>
<td>To activate the configuration.</td>
</tr>
<tr>
<td><em>Configuration Name</em></td>
<td>Describes the name of the FA reconciliation configuration, such as 850s for Acme Company.</td>
</tr>
<tr>
<td>Original Document Settings</td>
<td></td>
</tr>
<tr>
<td>Direction</td>
<td>Direction of the original document in the context of Inovisworks. Outbound means the original document was sent by your company to your trading partner.</td>
</tr>
<tr>
<td>Section/Field</td>
<td>Type or Select</td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Standard</td>
<td>Standard to which the FA reconciliation settings are to be applied; for example, EDI-X12, EDI-EDIFACT, or any other supported standard.</td>
</tr>
</tbody>
</table>
| Transaction Types    | Transaction types for the outgoing document to be reconciled; for example, 850 for a purchase order or 810 for an invoice.  
  - All—Perform reconciliation on all types of outgoing documents.  
  - Only Selected Types—Perform reconciliation on only the outgoing documents that are selected.  
  Click Ctrl to select multiple document types. |
|                      | Customer Defined: Transaction types that are unique to your company, one per line. |
| Sender ID/Qualifier   | For your company, sender IDs and qualifiers for which to reconcile outgoing documents.  
  - All—Reconcile outgoing documents for all sender ID/qualifiers.  
  - Only Selected—Reconcile outgoing documents only if the sender ID/qualifier is selected.  
  - Exclude Selected—Reconcile outgoing documents for all sender IDs/qualifiers except those that are selected. |
|                      | Customer Defined: For your company, additional criteria, such as group ID/qualifier and group version. |
|                      | Format: Brackets mean optional. No spaces are allowed.  
  Examples:  
  - SenderID(SenderQual):SenderGroupID(SenderGroupQual):GroupVersion  
    (Complete information)  
  - SenderID(SenderQual):SenderGroupID:GroupVersion  
    (Group qualifier is optional)  
  - SenderID(SenderQual):SenderGroupID  
    (Version is optional)  
  - SenderID(SenderQual::GroupVersion  
    (Group ID/qualifier is optional.  
  Important: Note the use of the double colons (::).  
  - SenderID(SenderGroupID(SenderGroupQual):GroupVersion  
    (IC qualifier is optional)  
  Receiver ID/Qualifier | For your trading partner, receiver IDs and qualifiers for which to reconcile outgoing documents.  
  - All—Reconcile outgoing documents for all receiver ID/qualifiers.  
  - Only Selected—Reconcile outgoing documents only if the receiver ID/qualifier is selected.  
  - Exclude Selected—Reconcile outgoing documents for all receiver IDs/qualifiers except those that are selected.  
  Type receiver IDs/qualifiers, one per line, in the text box. |
### FA Reconciliation Field Descriptions (Page 2 of 3)

These fields display on the second FA Reconciliation page.

<table>
<thead>
<tr>
<th>Section/Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Return Document Settings</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Transaction Types</strong></td>
<td>Based on the standard, the abbreviation for the return document. In X12, FAs are 997; in EDIFACT, FAs are CONTRL. Note: This field is populated only in Edit mode.</td>
</tr>
</tbody>
</table>

| **X12 Settings**              |                |
| **Validate Group Version**    | To indicate if the group version in the acknowledgement should be considered when determining which document is to be reconciled. |
| **Always Reconcile Last Group** | To indicate how to reconcile FAs that match duplicate group IDs. Forces reconciliation against the last group sent. **Note:** If not checked, Inovisworks generates an error. |
| **Allow Re-Reconcile**        | To indicate how to handle acknowledgements that match already acknowledged documents. Forces re-reconciliation using the latest acknowledgement. **Note:** If not checked, Inovisworks ignores the second acknowledgement. |

| **EDIFACT Settings**          |                |
| **Validate Message Version**  | To indicate if the message version in the acknowledgement should be considered when determining which document is to be reconciled. |
| **Reconcile Last Sent Interchange** | To indicate how to handle acknowledgements that match duplicate interchange IDs. Forces reconciliation against the last sent interchange. **Note:** If not checked, Inovisworks generates a duplicate interchange error. |
| **Accept Only EDIFACT Acknowledgement Codes 4, 7, and 8** | If checked, Inovisworks accepts only EDIFACT acknowledgement codes 4, 7, and 8 from element 0083.  
  - 4—This level and all lower levels rejected  
  - 7—This level and all lower levels acknowledged (if the level is not rejected)  
  - 8—Interchange received  
  If not checked, Inovisworks accepts these codes:  
  - 1—EDIFACT acknowledgement all good  
  - 2—EDIFACT acknowledgement error detected  
  - 3—EDIFACT acknowledgement errored at low levels  
  - 5—EDIFACT acknowledgement header OK  
  - 6—EDIFACT acknowledgement header bad  
  If not checked, all other codes will cause an “illegal status code” error. |
FA Reconciliation Field Descriptions (Page 3 of 3)

These fields display on the third FA Reconciliation page.

<table>
<thead>
<tr>
<th>Section/Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time Based On</td>
<td>If business hours have been defined, the business hour configuration you want to use. Inovisworks applies or “counts” timeout periods only during the business hours specified in the configuration. If blank, Inovisworks runs based on a 24 hour clock (seven days a week, 24 hours a day).</td>
</tr>
</tbody>
</table>

### Timeout Settings

<table>
<thead>
<tr>
<th>Enabled</th>
<th>To activate the timeout setting.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timeout Type</td>
<td>Status to which you want the original document changed if a timeout occurs:</td>
</tr>
<tr>
<td></td>
<td>- Warning—Change the document’s status to Warning.</td>
</tr>
<tr>
<td></td>
<td>- Violation—Change the document’s status to Violation.</td>
</tr>
<tr>
<td>Reference Date</td>
<td>Date the timeout for the expected acknowledgement is to start.</td>
</tr>
<tr>
<td></td>
<td>- Original Document Processed Date—Date Inovisworks processed the original document.</td>
</tr>
<tr>
<td></td>
<td>- Extract Date from Original Document—Date that is extracted from the original document. Select the date code field from the drop-down list; for example, 068—Current Schedule Ship.</td>
</tr>
</tbody>
</table>

**Note:** Inovisworks uses the Reference Date and the “Timeout Interval” to calculate the timeout time.

<table>
<thead>
<tr>
<th>Timeout Interval</th>
<th>Interval of time, in days and hours, between the “Reference Date” and the time when the acknowledgement has exceeded an acceptable timeframe in which to be received.</th>
</tr>
</thead>
</table>
|                       |  - Before—Timeout is to occur before the Reference Date.  
|                       |  **Example:** If the Reference Date is 010—Requested Ship and your company must receive an acknowledgement before that date, the Timeout Interval should be before the Reference Date. |
|                       |  - After—Timeout is to occur after the Reference Date.  
| **Note:** Inovisworks uses the Time Interval and the “Reference Date” to calculate the timeout time. |

<table>
<thead>
<tr>
<th>Send Alert To</th>
<th>Send an alert that a timeout has occurred to:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Sender of Original Document</td>
</tr>
<tr>
<td></td>
<td>- Receiver of Original Document</td>
</tr>
</tbody>
</table>

| Timeout 2             | See “Timeout Settings” on page 196.                                             |
| Timeout 3             | See “Timeout Settings” on page 196.                                             |

### Event Notification Settings

<table>
<thead>
<tr>
<th>Notify if Accepted</th>
<th>Notify the sender of the original document each time an acknowledgement with an Accepted status is received.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Important:</strong> Set up email addresses to which notifications will be sent from Administration tab &gt; Event Notification &gt; Configure Event Notifications.</td>
<td></td>
</tr>
</tbody>
</table>
Stage 2—Setting up Email Addresses in Event Notification Configurations

The second stage of the FA reconciliation setup process is to define event notification configurations. The configurations specify the email addresses to which FA notifications will be sent.

- “FA Settings and Corresponding FA Event Groups” on page 197
- “Setting up Email Addresses for FA Event Notifications” on page 198

FA Settings and Corresponding FA Event Groups

The timeout type and event notification settings defined in “Stage 1—Setting up FA Reconciliation Settings for Original Documents” correspond to specific FA event groups in event notification.

### Section/Field

<table>
<thead>
<tr>
<th>Section/Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify if Not Matched</td>
<td>Notify the sender or receiver of the original document each time an acknowledgement is not matched to an original document. Important: Set up email addresses to which notifications will be sent from Administration tab &gt; Event Notification &gt; Configure Event Notifications.</td>
</tr>
<tr>
<td>Notify if Rejected</td>
<td>Notify the sender of the original document each time an acknowledgement with a Rejected status is received. Important: Set up email addresses to which notifications will be sent from Administration tab &gt; Event Notification &gt; Configure Event Notifications.</td>
</tr>
<tr>
<td>Notify if Other Errors</td>
<td>Notify the sender or receiver of the original document each time an error occurred during acknowledgement processing. Important: Set up email addresses to which notifications will be sent from Administration tab &gt; Event Notification &gt; Configure Event Notifications.</td>
</tr>
</tbody>
</table>

An event group is a set of related events, such as document errors. For example, if your company wants to be notified when it gets an FA that rejects an original document (Notify if Rejected is selected in Event Notification Settings), the “Ack Reject for Org Doc Sender” event group must be selected when defining event notification configurations.

Event notification configurations specify the email addresses to which notifications will be sent.
The table shows how FA reconciliation settings correspond to FA event groups in event notification.

<table>
<thead>
<tr>
<th>When these options are selected in FA reconciliation settings</th>
<th>Use this FA event group when defining email addresses in event notification configurations</th>
<th>Emails can be sent to...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Timeout Type Settings</strong></td>
<td>Ack Warning Timeout for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td>Warning</td>
<td>Ack Warning Timeout for Org Doc Receiver</td>
<td>Receiver</td>
</tr>
<tr>
<td>Violation</td>
<td>Ack Violation Timeout for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td></td>
<td>Ack Violation Timeout for Org Doc Receiver</td>
<td>Receiver</td>
</tr>
<tr>
<td><strong>Event Notification Settings</strong></td>
<td>Ack Accepted for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td>Notify if Accepted</td>
<td>Ack Not Matched for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td>Notify if Not Matched</td>
<td>Ack Not Matched for Org Doc Receiver</td>
<td>Receiver</td>
</tr>
<tr>
<td>Notify if Rejected</td>
<td>Ack Reject for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td>Notify if Other Errors</td>
<td>Other Ack Error for Org Doc Sender</td>
<td>Sender</td>
</tr>
<tr>
<td></td>
<td>Other Ack Error for Org Doc Receiver</td>
<td>Receiver</td>
</tr>
</tbody>
</table>

**Important:** If your trading partner (receiver) is to get event notifications, email addresses must be set up for the events that correspond to the receiver’s acknowledgement reconciliation settings. The email addresses are defined in an event notification configuration.

**Setting up Email Addresses for FA Event Notifications**

See “Setting up Event Notifications for FA Events” on page 125.

**Set Up Process Complete**

After completing the two stages in the FA reconciliation set up process, Inovisworks reconciles FAs to original documents you send to your trading partners.

Use the Document Tracking tab to view and track FAs (see “Tracking Functional Acknowledgements” on page 63).

**Filtering Existing FA Reconciliation Settings**

**To filter existing FA Reconciliation settings**

1. Select the account (PSN) that subscribes to FA reconciliation.
2. Click the Administration tab > Ack Reconciliation.
The Acknowledgement List page opens.

<table>
<thead>
<tr>
<th>Filter Criteria</th>
<th>Filter Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reconciliation ID</td>
<td></td>
</tr>
<tr>
<td>Standard</td>
<td></td>
</tr>
<tr>
<td>Sender Trading ID</td>
<td></td>
</tr>
<tr>
<td>Active Status</td>
<td></td>
</tr>
<tr>
<td>Document Types</td>
<td></td>
</tr>
<tr>
<td>Receiver Trading ID</td>
<td></td>
</tr>
</tbody>
</table>

The results of your search display.

3 Click Filter.

4 Select the criteria for the filter > click Apply (see “Reconciliation Filter List Field Descriptions” on page 199).

The results of your search display.

### Reconciliation Filter List Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ack Reconciliation Filter</td>
<td></td>
</tr>
<tr>
<td>Reconciliation ID</td>
<td>Identifier for the configuration.</td>
</tr>
<tr>
<td>Active Status</td>
<td>Status of the configuration, active or inactive.</td>
</tr>
<tr>
<td>Original Document Settings</td>
<td></td>
</tr>
<tr>
<td>Standard</td>
<td>EDI standard by which you want to filter the list; for example, X12 or EDIFACT.</td>
</tr>
<tr>
<td>Document Type</td>
<td>Transaction types by which you want to filter the list; for example, 850 for a purchase order or 810 for an invoice.</td>
</tr>
<tr>
<td>Sender ID/Qualifier</td>
<td>Sender ID and qualifier by which you want to filter the list.</td>
</tr>
<tr>
<td>Receiver ID/Qualifier</td>
<td>Receiver ID and qualifier by which you want to filter the list.</td>
</tr>
</tbody>
</table>

### Editing FA Reconciliation Settings for Original Documents

To edit FA reconciliation settings for an original document

1 Select the account (PSN) that subscribes to FA reconciliation.

2 Click the Administration tab > Ack Reconciliation.
3 Select the configuration > click Edit.

4 Modify the information as needed, clicking Step, Previous, or Finish until you have updated the configuration.

5 Click Complete.
   The page lists the updated FA reconciliation settings for the original document.

6 Click Finish.
   You have updated the configuration.

**Viewing FA Reconciliation Settings for Original Documents**

To view FA reconciliation settings for an original document
1 Select the account (PSN) that subscribes to FA reconciliation.
2 Click the Administration tab > Ack Reconciliation.
3 Select the configuration > click View.
   The current configuration settings display.
4 If you want to modify the information, click Edit and go to step 4 in “Editing FA Reconciliation Settings for Original Documents” on page 199.

**Deleting FA Reconciliation Settings for Original Documents**

To delete FA reconciliation settings for an original document
1 Select the account (PSN) that subscribes to FA reconciliation.
2 Click the Administration tab > Ack Reconciliation.
3 Select the configuration > click Delete.
4 Click Confirm Delete.
Account Admin role  An external role assigned to a person responsible for managing specific accounts (PSNs). The Account Admin role has limited access to information and administrative functions the assigned account (PSN).

Account User role  This role is assigned to a person responsible for maintaining specific accounts (PSNs). The Account User roles has limited access only to those accounts (PSN) assigned.

Application assigned number  A reference number for an Inbound file; for example, PO Number.

AS1 / AS2  Applicability Statement 1 (AS1) and Applicability Statement 2 (AS2) are secure methods for transferring encrypted data across the Internet.

Breadcrumbs  Links that display across the top of Inovisworks page showing where you are in the application and how you got there. By clicking on a link (a breadcrumb) you return to the page selected.

Charge type  An invoice line item indicating the type of charge.

Customer Admin role  The role assigned to a person responsible for setting up and maintaining User roles and functions within a company.

Customer ID  A nine-digit number identifying an Inovisworks customer. More than one account can be associated with a single customer ID.

Customer User role  A role assigned by the Customer Admin. Customer User roles are confined to those accounts for which she or he is responsible.

Document  In Inovisworks, the word “document” means an “interchange” or a transaction.

Document ID  A numeric identifier assigned to a document at the Interchange level. A Document ID is variable length and assigned by Inovisworks for each Interchange.

Document status  The status of a document on the GXS network. For example, Available, Received, Hold, etc. See “Status Definitions” on page 203.

Document type  The type of document, such as Purchase Order (PO) or Invoice (IN).

Event  An action performed on a document as it travels through the GXS network. For example, Enter Gateway, Validate, or Received/Interconnected.
Event Tracking graph  A graph showing document events and status. Using color-coded nodes a document’s progress is tracked through the GXS network and shown in graph form.

Fromvan  FTP folders, automatically created by GXS, used to store EDI transactions ready to be retrieved.

File Transfer Protocol  FTP—used to transfer large files.

FTP Outbound Service  An GXS service which automatically sends documents to a receiver’s FTP server. Customers who register for this service do not need perform an FTP pull.

FTP Pull  Trading Partner documents retrieved by using the FTP pull commands, such as fromvan/get< filename>.

FTP push  Trading Partner documents are sent using FTP push commands, such as tovan/put <filename>.

Functions  Tasks users perform while working in Inovisworks. Functions available to a user depend on his or her defined role.

Gateways  Document exchange servers. Inovisworks customers exchange documents using FTP, Pipeline, X400, EDI-INT, and UCCNet gateways.

Hold Status  The sender of an outbound document can put a document on hold, making it unavailable to the Trading Partner.

Inbound documents  Documents sent to you from your Trading Partner.

Inovisworks  GXS’ value added network (VAN), which securely exchanges information regardless of data type, network, or connectivity standards.

Interconnect  Another public or private network Inovisworks uses to transfer data.

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

Mailbag  A file containing bundled data, used by VANs to transmit and track large amounts of data.

Non-peak time  Between 8 p.m. and 6 a.m., Monday through Friday, Eastern Standard Time (EST), and all day Saturday and Sunday, when there is less traffic on GXS:Access.

Online Enabled  An online Inovisworks service offering, such as Access:OnRamp.

OnRamp  Free connectivity software, available through the Inovisworks.

Outbound documents  Documents sent from your company to a Trading Partner.

Outbound FTP custom file names  File names automatically created by GXS to store outbound documents in the FTP directory.
Product service number (PSN)  A unique nine-digit account number. An account represents the GXS software owned by or service subscribed to by the customer.

Peak time  Between 6 a.m. and 8 p.m., Monday through Friday, EST, when the heaviest network traffic occurs.

Qualifier  Designates the sender and receiver IDs of Trading Partners. A ZZ qualifier means the sender and receiver ID is mutually defined by the Trading Partners.

Queue  Where documents “wait their turn” to be sent or received.

Required fields  Indicated by an asterisk (*), these fields must contain information.

Roles  Defines functions or tasks available to users of Inovisworks. Each user is assigned a role.

Service charge  The cost of an GXS service mailbox.

Status Definitions

<table>
<thead>
<tr>
<th>Document Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-Progress</td>
<td>Documents presently processing through Inovisworks.</td>
</tr>
<tr>
<td>Available</td>
<td>All documents in a mailbox and available for pickup by the recipient.</td>
</tr>
<tr>
<td>Received</td>
<td>Document was received.</td>
</tr>
<tr>
<td>Hold</td>
<td>Sender, receiver, or a document rule placed a document on hold. This makes</td>
</tr>
<tr>
<td></td>
<td>the document unavailable.</td>
</tr>
<tr>
<td>System Hold</td>
<td>Inovisworks put the document on hold because the sender’s or receiver’s</td>
</tr>
<tr>
<td></td>
<td>account has a Delinquent or Cancel status.</td>
</tr>
<tr>
<td></td>
<td>Call the GXS billing department to reactivate the account.</td>
</tr>
<tr>
<td>Duplicate</td>
<td>Duplication of a document already sent.</td>
</tr>
<tr>
<td>Redirected</td>
<td>Document has been redirected within Inovisworks.</td>
</tr>
<tr>
<td>Modified</td>
<td>Original document was changed before being sent.</td>
</tr>
<tr>
<td>Pending Mailbag</td>
<td>Document is waiting to be placed inside a mailbag.</td>
</tr>
<tr>
<td>Pending Comm</td>
<td>Document has been mailbagged, and the mailbag is waiting to be sent.</td>
</tr>
<tr>
<td>In-Progress Ignored</td>
<td>Document is on a system that is down.</td>
</tr>
<tr>
<td></td>
<td>When the system comes back up, the document status changes to In-Progress.</td>
</tr>
<tr>
<td>Comm-Error</td>
<td>Document did not reach its recipient. Communications errors occur if:</td>
</tr>
<tr>
<td></td>
<td>■ the database is down or the connection to the database is lost.</td>
</tr>
<tr>
<td></td>
<td>■ your gateway connection is incorrect or lost.</td>
</tr>
<tr>
<td></td>
<td>■ a sender transmits a non-EDI document to a receiver who uses</td>
</tr>
<tr>
<td></td>
<td>async/bisync communications to get documents.</td>
</tr>
<tr>
<td>Data Syntax Error</td>
<td>Document data is not formatted to standard.</td>
</tr>
<tr>
<td>Data Validation Error</td>
<td>Document has an invalid receiver.</td>
</tr>
<tr>
<td>Processing Error</td>
<td>An error other than communication, data syntax, data validation, or rules</td>
</tr>
<tr>
<td></td>
<td>engine error.</td>
</tr>
</tbody>
</table>
Tovan  The FTP directory used to store EDI data files ready to send to a Trading Partner via Inovisworks.

Trading partner  A company with whom your company exchanges documents.

Trading profile  The Trading Partner's company information, including trading ID, billing address, and contacts.

Transaction Summary Graph  A color-coded graph showing the number and status of documents. Each Document Type, such as an invoice, is represented by a color.

Usage charge  The fees for using an GXS service. Usage charges are based on:
- GXS service used.
- Number of documents sent and received during peak or off-peak hours.
- Number of characters sent and received during peak or off-peak hours.
- Number of Trading Partners.
- Other trading network connections.

User roles  User roles define what functions/tasks users can perform in Inovisworks. These user roles defined by Inovisworks are:
- Customer Admin
- Customer User

Value added process  A process that adds value during a document exchange. For example, AS/2 connectivity link or X400 connectivity link.
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