IBM WebSphere Partner Gateway V6.1 Advanced and Enterprise Editions

EDI wizards

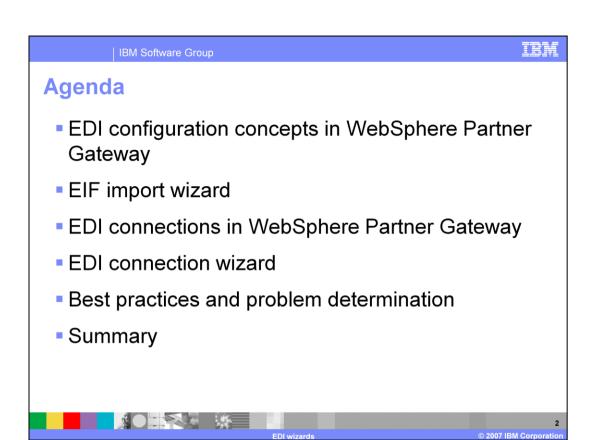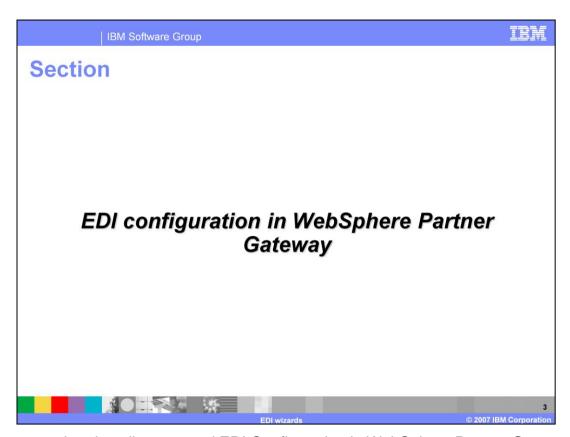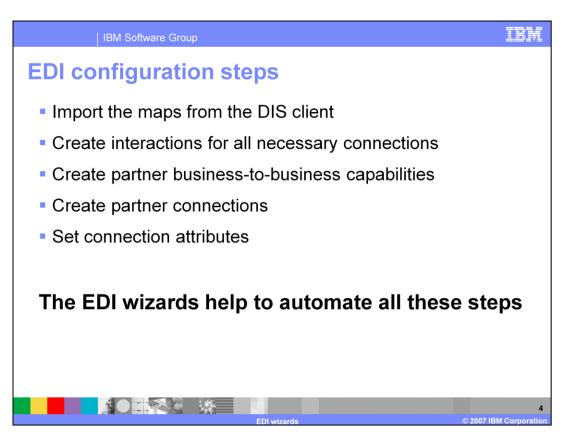## (Previously known as SupportPac™ GA02)

This presentation describes the EDI Wizard in WebSphere® Partner Gateway V6.1. The EDI Wizards were originally released as a support pack for WebSphere Partner Gateway V6.0. WebSphere Partner Gateway V6.1 comes with the EDI Wizards pre-installed.

Agenda

- EDI configuration concepts in WebSphere Partner Gateway
- EIF import wizard
- EDI connections in WebSphere Partner Gateway
- EDI connection wizard
- Best practices and problem determination
- Summary

The agenda starts with a review of EDI configuration in WebSphere Partner Gateway. Next is the EIF Import Wizard, followed by EDI connections needed for some specific scenarios in WebSphere Partner Gateway and EDI Connection wizard. The last topics will be best practices, and problem determination followed by summary.

Section

EDI configuration in WebSphere Partner Gateway

3

The next section describes general EDI Configuration in WebSphere Partner Gateway .

EDI configuration steps

- Import the maps from the DIS client
- Create interactions for all necessary connections
- Create partner business-to-business capabilities
- Create partner connections
- Set connection attributes

The EDI wizards help to automate all these steps

When configuring WebSphere Partner Gateway for EDI, you must do several things:

First, you must import the maps. In previous releases, this had to be done using the command line import script, or through a direct connection between the DIS Client and the WebSphere Partner Gateway database.

Next, you must determine which connections are necessary (such as De-Enveloping, Transformation, Enveloping, and so on), and create the interactions for these connections.

Then, you must enable the business-to-business capabilities for each partner that you want to include.

Then, you must create the partner connections, and set the connection attributes.

This process can be confusing and time consuming.

Although you can still opt to do it by hand, the EDI Wizards have been created to help automate all these steps.

Simply by using the two EDI Wizards, all of these steps will be completed for you.

This section covers the EIF import wizard. The EIF import wizard is located on the console, under the Wizards tab. It is only visible to hub operators (such as the hubadmin user).

The main goal of the EIF Import Wizard is to import your EDI maps through the console. The EIF Import Wizard provides a graphical user interface to the import process. The wizard assumes that your maps will be imported as .eif files, which contain compiled control string objects. This type of file can be extracted from the DIS Client that is shipped as part of WebSphere Partner Gateway.

A second goal of the EIF Import Wizard is to create interactions and associations in WebSphere Partner Gateway for your maps. In order to use a map in WebSphere Partner Gateway, the map must be associated with either a document definition, or an interaction. In the past, this was a time consuming step that had to be done for each imported map.
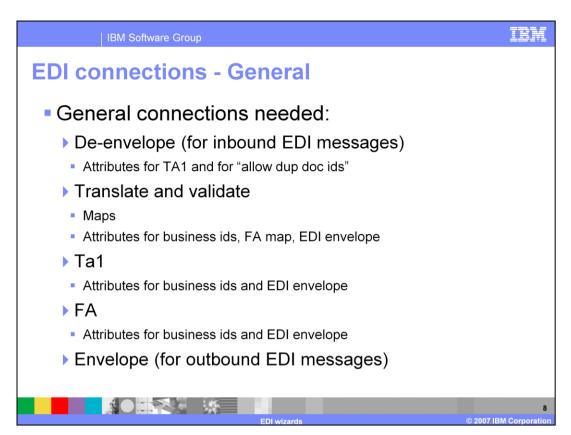
For transformation maps, the EIF Import Wizard will allow you to customize which interactions will be created by allowing you to specify a Package and an Action.

For validation maps, the wizard will automatically create associations to the correct document definition.

For FA maps, the wizard will automatically create associations and interactions.

Section

EDI connections in WebSphere Partner Gateway

EDI wizards

© 2007 IBM Corporation

7

After maps are imported, the next step is to determine which connections are needed. This section will describe the connections that may be needed to configure EDI in WebSphere Partner Gateway.

EDI connections - General

- **General connections needed:**
  - ▶ De-envelope (for inbound EDI messages)
    - Attributes for TA1 and for "allow dup doc ids"
  - ▶ Translate and validate
    - Maps
    - Attributes for business ids, FA map, EDI envelope
  - ▶ Ta1
    - Attributes for business ids and EDI envelope
  - ▶ FA
    - Attributes for business ids and EDI envelope
  - ▶ Envelope (for outbound EDI messages)

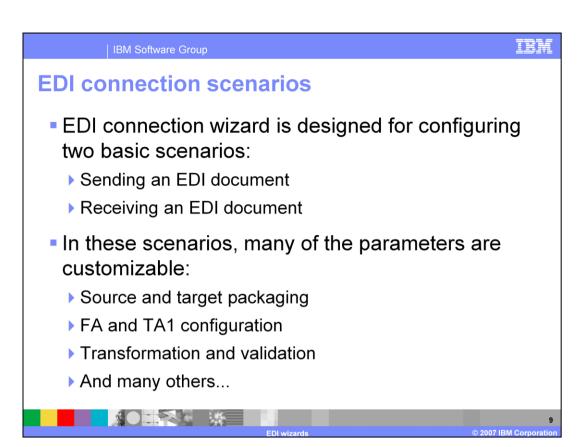EDI Configuration requires several connections in WebSphere Partner Gateway.

For all inbound enveloped EDI messages, WebSphere Partner Gateway must have a de-enveloping connection.

For all outbound EDI messages, WebSphere Partner Gateway must have an enveloping connection.

A connection is needed for translation and validation.

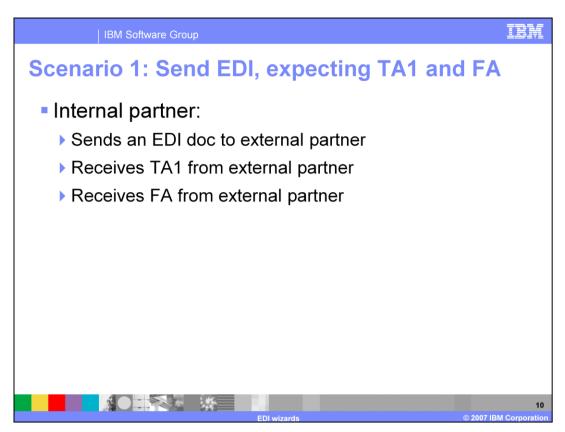Also, if a TA1 or an FA will be sent, a connection must be created for it.

This slide also lists some of the attributes that are needed on each connection.

IBM

EDI connection scenarios

- EDI connection wizard is designed for configuring two basic scenarios:
  - ▶ Sending an EDI document
  - ▶ Receiving an EDI document

- In these scenarios, many of the parameters are customizable:
  - ▶ Source and target packaging
  - ▶ FA and TA1 configuration
  - ▶ Transformation and validation
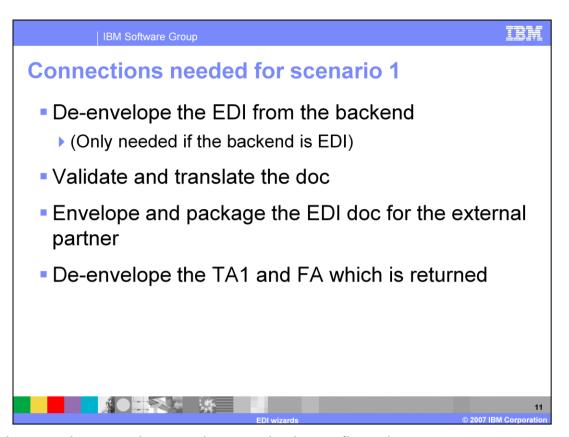 - ▶ And many others...

9

The EDI Connection Wizard is designed for configuring two basic scenarios. Sending an EDI document and Receiving an EDI document.

These scenarios are described in the next few slides.

In each of these scenarios, many of the parameters are customizable. Some examples of parameters are source and target packaging and document type, FA and TA1 configuration, Transformation and Validation, EDI parameters and delimiters, and many others.

IBM

Scenario 1: Send EDI, expecting TA1 and FA

- Internal partner:
  - ▶ Sends an EDI doc to external partner
  - ▶ Receives TA1 from external partner
  - ▶ Receives FA from external partner

EDI wizards

10

© 2007 IBM Corporation

In the first scenario, an EDI document is sent outbound to an External Partner. The sending partner expects to receive both a TA1 and a FA from the external partner.

Connections needed for scenario 1

- De-envelope the EDI from the backend
  - ▶ (Only needed if the backend is EDI)
- Validate and translate the doc
- Envelope and package the EDI doc for the external partner
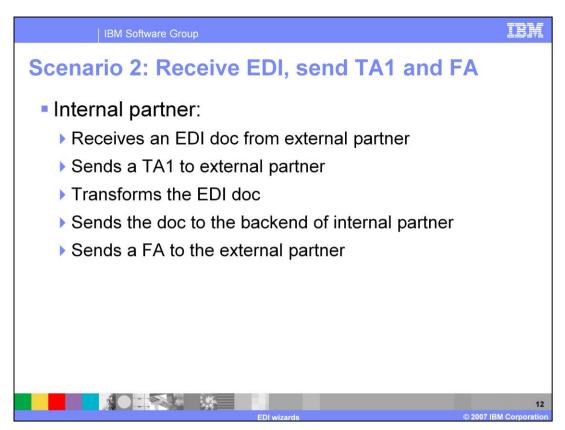- De-envelope the TA1 and FA which is returned

For this scenario, several connections need to be configured.

If your outbound EDI document comes in to WebSphere Partner Gateway using EDI from the backend, then you will need a de-enveloping connection for it. Typically, the backend is not EDI, and this connection is not needed.
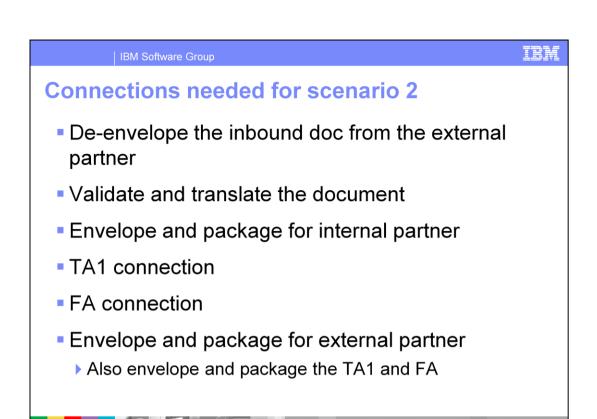
Next, you will need a connection that WebSphere Partner Gateway will use for validation and translation. Here, you would specify the validation and transformation maps that you want to use. On this connection, you also must specify the EDI attributes used in enveloping the message.

The next connection needed is the Enveloping connection for the EDI outbound document.

And finally, you will need a de-enveloping connection for the returning TA1 and FA to share.

Scenario 2: Receive EDI, send TA1 and FA

- Internal partner:
  - ▸ Receives an EDI doc from external partner
  - ▸ Sends a TA1 to external partner
  - ▸ Transforms the EDI doc
  - ▸ Sends the doc to the backend of internal partner
  - ▸ Sends a FA to the external partner

In the second scenario, you will be receiving an inbound EDI document from an external partner. TA1 will be sent outbound back to that external partner. Internally, EDI document is transformed, and send it to the internal backend system. Then, a FA is sent outbound back to the external partner.

Connections needed for scenario 2

- De-envelope the inbound doc from the external partner

- Validate and translate the document

- Envelope and package for internal partner

- TA1 connection

- FA connection

- Envelope and package for external partner
  - Also envelope and package the TA1 and FA

The connections needed for scenario 2 are similar, but slightly different from the connections needed for scenario 1.

In scenario 2, you will need a de-enveloping connection used to de-envelope the inbound EDI document.

Next, you will need a connection to validate and translate the document. This connection can also be used to package the document for the internal partner backend system, assuming the backend does not need enveloped messages.

Next, you will need a connection for the TA1 configuration, and a connection for the FA configuration.

And finally, you will need an enveloping connection to allow messages to be enveloped before being sent back to the external partner. This enveloping connection will be used by both the TA1 and the FA.

Section

EDI connection wizard

WebSphere Partner Gateway Community Console

Account Admin I Viewers I Tools I Hub Admin I RosettaNet Partner Simulator I System Administration ▼ Wizards Logout I Help

EIF Import Wizard | **EDI Connection Wizard**
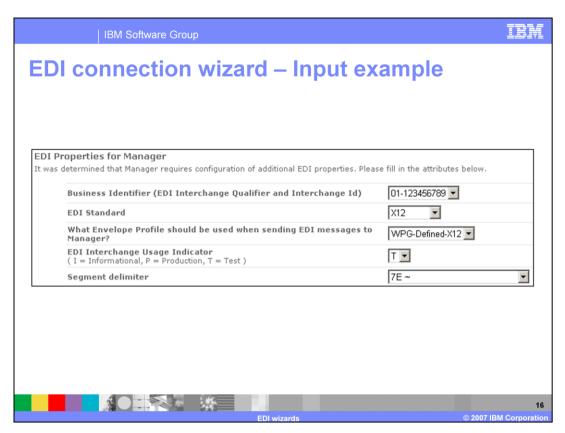
14

© 2007 IBM Corporation

The next section covers the EDI Connection wizard. The EDI Connection wizard is located on the console, under the Wizards tab.

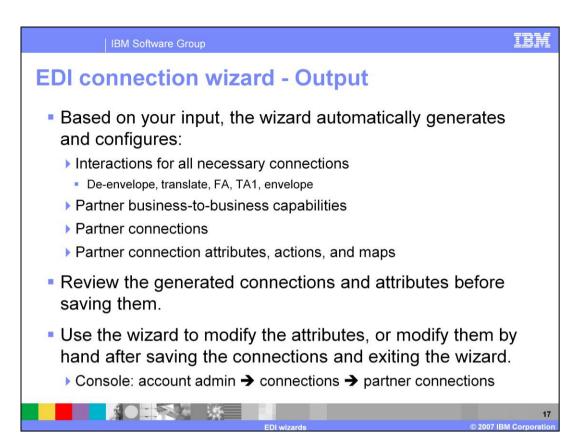It is only visible to hub operator, such as the hubadmin user.

EDI connection wizard - Input

- **The wizard guides you through the configuration process by asking questions about:**
  - ▶ Source and target partner
  - ▶ Document syntax, protocol, and document type
  - ▶ EDI standard
  - ▶ EDI attributes such as delimiters
  - ▶ Transformation and validation maps to use

The EDI Connection wizard can be used to generate and configure all of the connections listed in scenario 1 and scenario 2 on the previous slides.

The wizard is a series of question and answer screens that allow you to customize the connections that will be generated. You can specify things like source and target Partner, document syntax, protocol, and document type, EDI Standard, EDI attributes such as delimiters and Transformation and Validation Maps to use.

EDI connection wizard – Input example

EDI Properties for Manager

It was determined that Manager requires configuration of additional EDI properties. Please fill in the attributes below.

Business Identifier (EDI Interchange Qualifier and Interchange Id)	01-123456789
EDI Standard	X12
What Envelope Profile should be used when sending EDI messages to Manager?	WPG-Defined-X12
EDI Interchange Usage Indicator (I = Informational, P = Production, T = Test)	T
Segment delimiter	7E ~

This is a panel from an example input screen in the EDI Connection Wizard. You can view the show-me demos of the wizard provided in the IBM Education Assistant.

EDI connection wizard - Output

- Based on your input, the wizard automatically generates and configures:
  - Interactions for all necessary connections
    - De-envelope, translate, FA, TA1, envelope
  - Partner business-to-business capabilities
  - Partner connections
  - Partner connection attributes, actions, and maps
- Review the generated connections and attributes before saving them.
- Use the wizard to modify the attributes, or modify them by hand after saving the connections and exiting the wizard.
  - Console: account admin ➔ connections ➔ partner connections

At the end of the wizard, it will automatically generate and configure interactions for all necessary connections, such as all de-enveloping, translation, FA, TA1, and enveloping connections.

It will add the necessary business-to-business capabilities to the specified partners.

It will create the partner connections, and will set the attributes, actions, and maps on those connections.

The wizard allows you to review the generated connections and attributes before saving them.

When reviewing your connections and attributes, you can either use the wizard to make modifications, or after completing the wizard, you can edit the connections and attributes in the console.

Section

Best practices, important notes, and problem determination

EDI wizards

18

© 2007 IBM Corporation

The next section covers the best practices, notes, and problem determination.

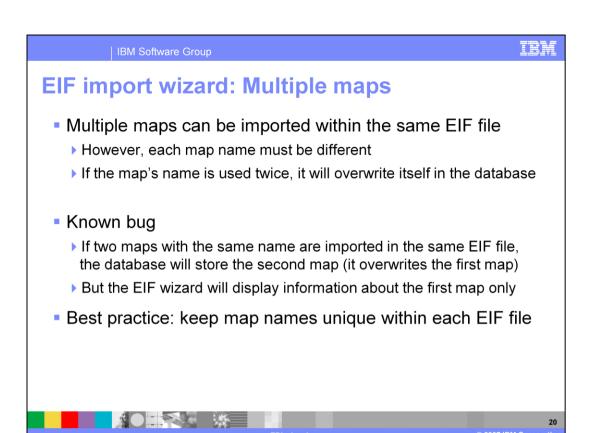## EIF import wizard: Locking mechanism

- The import wizard implements a logical locking mechanism that forces only one user to use the wizard at a time.
  - ▸ Your session ID is stored in the database when you click the import button and is removed from the database when you click the finish or cancel buttons.
- If you exit the console without clicking the finish or cancel buttons on the import wizard, your session ID will still exist in the database, and the wizard will remain locked.
- Only the hubadmin user can unlock the wizard.
- This locking mechanism is only implemented on the import wizard, not the connection wizard.

The EIF Import Wizard implements a logical locking mechanism that forces only one user to use the wizard at a time. Your session ID is stored in the database when you click the Import button; and is removed from the database when you click the Finish or Cancel buttons. If you exit the console without clicking the Finish or Cancel buttons on the Import Wizard, your session ID will still exist in the database, and the wizard will remain locked.

If you leave the wizard locked, only the hubadmin user can unlock the wizard.

This locking mechanism is only implemented on the Import Wizard, not the Connection Wizard.

EIF import wizard: Multiple maps

- Multiple maps can be imported within the same EIF file
  - However, each map name must be different
  - If the map's name is used twice, it will overwrite itself in the database

- Known bug
  - If two maps with the same name are imported in the same EIF file, the database will store the second map (it overwrites the first map)
  - But the EIF wizard will display information about the first map only

- Best practice: keep map names unique within each EIF file

20

Multiple maps can be imported within the same EIF file. However, each map name must be different. If the map's name is used twice, it will overwrite itself in the database.

There is a known bug. If two maps with the same name are imported in the same EIF file, the database will store the second map. It overwrites the first map, but the EIF Wizard will display information about the first map only. As a best practice, keep map names unique within each EIF file.

Importing a second EIF file which contains the same map name as a previous or existing map is fine, and will not cause any errors. As expected, the older map in the system will be overwritten by the newly imported map with the same name.

EDI connection wizard: Pre-configuration

- Pre-configuration steps needed before connection wizard should be used:
  - ▶ Create the internal partner
  - ▶ Create at least one external partner
  - ▶ Create an EDI business ID for each partner.
    - An EDI business ID is defined here as a freeform business identifier having the form "qq-nnnnnnnnn"
      - Where "qq" is the 2 digit EDI interchange qualifier, and "nnnnnnnnn" is the 9 digit EDI interchange identifier
  - ▶ Create destinations and set default destinations for each partner used
  - ▶ Create or configure envelope profiles

Before using the EDI Connection wizard, you must have some configuration done in WebSphere Partner Gateway.

You must create the internal partner and at least one External Partner. You must create an EDI Business ID for each partner. An EDI Business Id is defined here as a Freeform Business Identifier having the form "qq-nnnnnnnnn". The "qq" is the 2 digit EDI Interchange Qualifier, and "nnnnnnnnn" is the 9 digit EDI Interchange Identifier.

Additionally, you must create destinations and set Default Destinations for each partner used. You must create or configure Envelope Profiles. This step is optional if you want to use the WebSphere Partner Gateway defined envelope profiles.

EDI connection wizard: Pre-configuration

- Additional configuration may be needed before WebSphere Partner Gateway is completely configured for EDI:
  - Configure XML formats
    - Only needed if you are sending or receiving XML
  - Configure receivers
    - If you are using record-oriented data (ROD), you may also need ROD splitter configured on the receiver
  - Configure connection attributes for AS1,AS2,AS3
    - Only needed if you are using AS packaging

Additional configuration may be needed before WebSphere Partner Gateway is completely configured for EDI.

If you are sending or receiving XML, you must configure XML formats.

If you are using ROD, you may also need ROD splitter configured on the Receiver.

If you are using AS packaging, you will need to configure Connection Attributes for AS1, AS2, or AS3.

Receivers need to be configured. A Receiver is needed before you can send or receive files, regardless of your configuration.

EDI connection wizard: Notes

- Some connection attributes can be changed in the wizard

- Others must be changed after the connections have been generated
  - In console, use account admin ➔ connections panels

- Examples:
  - EDI delimiters
  - Maps
  - Actions
  - Or any other attributes

As mentioned before, some connection attributes can be changed in the wizard, and others must be changed after the connections have been generated.

For example, if you want to use an alternate EDI delimiter that is not in the drop down list in the Wizard, you can enter your own delimiter on the Connections screen.

If you want to specify an alternate map or action that is not in the list of available maps or actions on the wizard, you can use the console to modify it later.

EDI connection wizard - Notes

- In the EDI connection wizard, the transformation maps will only appear if they have been previously assigned to an interaction with matching protocol and doc type.

- *Best practice*: by uploading the transformation maps through the import wizard, the related interactions will be created for you.

- Validation maps will only appear in the EDI connection wizard if they have been associated with the selected protocol and doc type.

EDI wizards

© 2007 IBM Corporation

24

Additional notes about the Connection Wizard:

In the EDI Connection Wizard, the transformation maps will only appear if they have been previously assigned to an interaction with matching Protocol and Doc Type.

As a Best Practice, upload the transformation maps through the Import Wizard. The related interactions will be created for you.

Validation maps will only appear in the EDI Connection Wizard if they have been associated with the selected Protocol and Doc Type.

The next section covers the summary and references.

Summary

- Use EIF import wizard to import EIF files through the console.
  - ▶ EIF import wizard will create and associate interactions with your maps
- Use the EDI connection wizard to help generate the necessary connections and attributes for basic EDI flows.
- View the show-me demos for a walkthrough of the wizards.

EDI wizards

26

© 2007 IBM Corporation

In summary, you can use the EIF Import wizard to import EIF files through the console. The EIF Import Wizard will create and associate interactions with your maps.

You can use the EDI Connection Wizard to help generate the necessary connections and attributes for basic EDI flows.

You can view the show-me demos for a walkthrough of the wizards.

IBM

Trademarks, copyrights, and disclaimers